

COMMUNITY NEEDS ASCERTAINMENT

NORTHERN DAKOTA COUNTY CABLE COMMUNICATIONS COMMISSION

**(Inver Grove Heights, Lilydale, Mendota, Mendota Heights,
South St. Paul, Sunfish Lake, and West St. Paul, Minnesota)**

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TABLE OF CONTENTS

Page

I. INTRODUCTION AND OVERVIEW	1
II. COMMUNITY CABLE NEEDS AND INTERESTS	2
A. OVERVIEW AND METHODOLOGY	2
B. COMMUNITY FOCUS GROUP WORKSHOPS AND ON-LINE SURVEY	3
C. SUMMARY OF DISCUSSIONS AND BRAINSTORMING DURING	29
COMMUNITY FOCUS GROUP SESSIONS	
D. TELEPHONE SURVEY OF CABLE SUBSCRIBERS.....	41
E. PEG ACCESS OPERATIONS, FACILITIES, AND EQUIPMENT	43
F. ADDITIONAL MEETINGS AND INTERVIEWS	57
G. SUMMARY OF MAJOR FINDINGS.....	62
III. RECOMMENDATIONS REGARDING COMMUNITY CABLE-RELATED.....	73
NEEDS AND INTERESTS	
A. INTRODUCTION.....	73
B. CABLE DISTRIBUTION SYSTEM.....	73
C. SUBSCRIBER SERVICES AND CUSTOMER SATISFACTION	79
D. PEG ACCESS	81

APPENDICES

1. Community Needs & Interests Questionnaire
2. Responses to the Community Needs and Interests Questionnaire
 - 2a. Questionnaire Open-Ended Responses: Comments about Comcast
 - 2b. Questionnaire Open-Ended Responses: Comments about TST
3. Notes from Focus Group Brainstorming Sessions
4. TST Local Programming Operations Questionnaire
5. TST Community Media Facility Inventory
6. Suggested TST Equipment Replacement/Upgrade Packages

COMMUNITY NEEDS ASCERTAINMENT

NORTHERN DAKOTA COUNTY CABLE COMMUNICATIONS COMMISSION

I. INTRODUCTION AND OVERVIEW

The Buske Group was retained by the Northern Dakota County Cable Communications Commission (“NDC4”) -- a seven-city municipal joint powers consortium consisting of the Cities of Inver Grove Heights, Lilydale, Mendota, Mendota Heights, South St. Paul, Sunfish Lake, and West St. Paul, Minnesota (the “NDC4 franchise area”) -- to conduct an ascertainment of community cable-related needs and interests, for use during franchise renewal negotiations with Comcast of Minnesota, Inc. (“Comcast”). The Buske Group was authorized to conduct research in order to identify current and future community cable-related needs and interests.

Comcast currently operates a cable system in the NDC4 franchise area under franchises that expire in 2015.

As a matter of federal law, the cable-related needs and interests of residents are protected in part through the Franchise renewal process. As part of the Franchise renewal process, NDC4, on behalf of its member cities, is responsible for identifying cable-related needs and interests, and translating those interests into Franchise requirements. During renewal proceedings, NDC4 may identify and establish requirements for cable system capacity, functionality, and customer service, and require cable operators to provide -- among other things -- facilities and equipment and channels for Public, Educational, and Government (PEG) Access. As stated in the legislative history to the Cable Communications Policy Act of 1984, as amended (the “Cable Act”):

The ability of a local government entity to require particular cable facilities (and to enforce requirements in the Franchise to provide those facilities) is essential if cable systems are to be tailored to the needs of each community [and the legislation] explicitly grants this power to the franchising authority.

It is wise to use a variety of informational-gathering tools when conducting a needs ascertainment in any subject area. However, it is critical to use such a variety of tools when dealing with a technology arena that is rapidly evolving, such as cable communications.

II. COMMUNITY CABLE NEEDS AND INTERESTS

A. OVERVIEW AND METHODOLOGY

In order to develop a basic understanding of the current and future cable-related needs and interests for the NDC4 franchise area, public input was critical. Following is a brief description of the tasks performed by The Buske Group in an effort to identify community cable-related needs and interests in the NDC4 franchise area:

- Conducted a series of seven community focus group workshops - attended by representatives of area community groups, organizations, educational institutions, government agencies and citizens - to help identify current and future cable-related needs and ascertain attitudes about existing cable services and programming.
- Distributed questionnaires to focus group participants that were designed to identify community cable-related needs and interests, assess whether current local cable TV services and resources are adequate and appropriate, and help to identify changes that might be made to meet future community cable-related needs and interests.
- Prepared and conducted an on-line survey that included the same questions as those in the focus group questionnaire (thereby permitting residents and representatives of area organizations and institutions who were unable to participate in the focus groups to provide input to this Community Needs Ascertainment).
- Conducted a telephone survey of Comcast cable subscribers that asked questions about the company's cable signal quality, customer service, and related matters; PEG Access awareness and viewership; and the importance of local PEG Access programming.
- Prepared and distributed questionnaires for completion by the Town Square Television ("TST") staff regarding the existing PEG Access facilities, equipment, programming and services that are provided in the NDC4 franchise area.
- Met with TST staff and inspected the PEG Access equipment and facilities, including council chambers production equipment packages for four of the member cities.
- Conducted face-to-face stakeholders meetings with representatives of Dakota County, ISD 199, ISD 197, and South St. Paul Schools to further explore communication needs in the NDC4 franchise area.

Information was gathered from the following groups:

- Cable subscribers and non-subscribers
- Health and human service organizations and agencies
- Arts, culture, music and heritage organizations
- Nonprofit, civic and community groups
- Churches and faith-based organizations
- Police, fire, and other public safety agencies
- Elected officials and representatives of government agencies
- Schools and educational institutions
- Members of the general public
- School teachers and staff

B. COMMUNITY FOCUS GROUP WORKSHOPS AND ON-LINE SURVEY

On January 14-16 and February 12, 2014, The Buske Group facilitated seven focus group workshops in the NDC4 franchise area. The workshop constituencies were:

- Local Government (Department Heads, Staff and Elected Officials)
- Arts, Culture, Media and Heritage Organizations
- Community, Youth, Senior, Recreation, and Non-Profit Organizations
- Pre-K-12 and Post-Secondary Education (Teachers, Administrators, Staff, Parents and Students)
- Human, Social Services & Faith Based Organizations
- Business, Civic Organizations, Chambers of Commerce, Neighborhood Groups
- Young Adults

The focus group workshops provided an opportunity for the exchange of information and ideas in the following general areas: (1) an overview of the cable franchise renewal process; (2) an explanation of how the current cable system works; and (3) an exploration of how individuals, community groups, government agencies, businesses, schools, and other organizations can benefit from or use the cable communication system. Special emphasis was placed on providing an opportunity for discussion and brainstorming by the participants.

A packet of informative materials (including a "Community Needs & Interests" questionnaire that was designed to identify community cable-related needs and interests, assess whether current local cable TV services and resources are adequate and appropriate, and help to identify changes that might be made to meet future community cable-related needs and interests) was also distributed to focus group participants.

A total of 120 different people from the NDC4 franchise area attended the focus group workshops. These individuals were invited to fill out the aforementioned questionnaire, or complete an on-line version of the questionnaire. A total of 591 questionnaires were completed by people who either attended a focus group workshop or completed the questionnaire on-line. A copy of the paper questionnaire is provided as Appendix 1 to this report; Appendix 2 displays the responses to each survey question. A list of the 106 organizational and institutional affiliations represented by focus group participants and on-line survey respondents is provided below and on the following pages. (Many of the respondents did not indicate an organizational or institutional affiliation, and some of the organizations listed were identified by more than one participant.)

- 4-H
- Airport Relations Commission
- AVEX LLC
- Bauer Floor Covering
- Bester Brothers Transfer
- Brown College
- Business Voice
- Cable Comm. & City Council, Sunfish Lake
- Central Bank
- Cheerocalypse
- City of Inver Grove Heights
- City of Lilydale
- City of Mendota
- City of Mendota Heights
- City of South St. Paul
- City of Sunfish Lake
- City of West St. Paul
- Crown of Life Lutheran Church
- Dakota County Library - Wentworth and Wescott
- DARTS
- Deerwood Elementary
- Drain-Plane
- Eagle Brook Church
- Emanuel Lutheran Church
- Enke Films

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

- Eyetography
- First Calvary Baptist Church
- Friedman & Associates
- Globe Publishing Co
- Gold Eagle Realty
- Good Life Consultants, Inc.
- Good Samaritan Society
- Grace Lutheran Church
- Henry Sibley Band Boosters
- Henry Sibley Choir
- Henry Sibley Music Boosters
- Highland Friendship Club
- HORA
- Image Builders
- IN THE MOMENT Acting Studio
- Inver Grove Heights City Council
- Inver Grove Heights Park Commission
- Inver Grove Heights Planning Commission
- Inver Hills Community College
- ISD 196
- Kaposia Days
- Key Community Bank
- Killing Joke Films, Inc.
- Kuchera Insurance Agency Inc.
- L.A.E. Properties Inc
- Leading Brand Comedy
- LeVander Gillen & Miller PA
- Lilydale City Council
- Lions
- Lower Mississippi River Watershed Management Organization
- Mayor's Youth Task Force
- Meals on Wheels
- Mendota Heights ARC
- Mendota Heights City Council

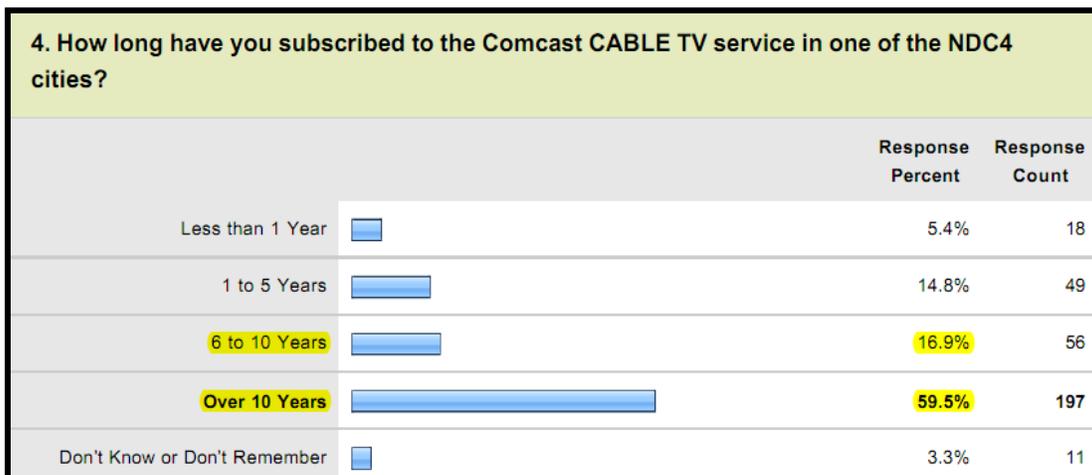
Organizational Affiliations of Focus Group/On-Line Survey Participants (continued)

- Mendota Heights Fire Department
- Mendota Heights Police
- Mendota Heights Public Works
- Mendota Heights Rotary
- Minnesota Brass/Holiday on Main Street
- Mo's Barber Shop
- MUKitchen
- MUSTA Advertising
- NDC4
- Neighbors, Inc.
- Net Ministries, Inc.
- On the Road Again
- Pine Bend Elementary
- Police Reserve
- Quantum Healing
- Quick-Serv License Center
- Ramsey County
- Real Estate Opportunities, Inc.
- Richard C Schmitt, CPA
- River Heights Chamber of Commerce
- Romanian Genealogy Society
- Rotary
- Ruffed Grouse Society
- Saint James Ev. Lutheran Church
- Savannah
- Sibley High School Music Dept.
- Silent Moon Coaching Services
- South Metro Fire
- South St. Paul Education Foundation
- South St. Paul Future, Inc.
- South St. Paul Public Library
- South St. Paul Jaycees
- South St. Paul Lions Club

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

- South St. Paul Parks & Recreation
- South St. Paul Public Library
- South St. Paul Public Schools
- South St. Paul Restorative Justice
- St. Croix Lutheran High school
- St. James Lutheran Church
- Town Square Television
- Tri District Community Ed
- Tribute To The Troops
- Twin Cities Film Fest
- University of St. Thomas
- University of Wisconsin-River Falls Focus on U
- Wakota Federal CU
- Xcel Energy

Over half (56.8%) of the focus group and online questionnaire respondents said they subscribe to the Comcast cable TV service in one of the NDC4 cities. Of these subscribers, 76.4% said they have been Comcast customers for more than five years.



Of the Comcast cable TV subscribers, 60.4% indicated that they pay extra to receive Comcast's high definition channels. Of the HD subscribers, over one-fourth (27.7%) said that they rarely or never watch channels that are not delivered in HD.

The Comcast subscribers were then asked to indicate which one source they used most often to find information about programming on their cable TV channels. The most frequently indicated source (61%) was Comcast’s on-screen program guide, as shown below.

7. Which ONE source of information do you use MOST OFTEN to find information about programming on cable TV channels? PLEASE CHECK ONE OF THESE:			
		Response Percent	Response Count
TV Section of Newspaper		9.9%	32
"TV Guide" Magazine		1.2%	4
Internet		8.4%	27
Comcast's On-Screen Program Guide		61.0%	197
"Channel Surfing"		15.5%	50
Don't Know		1.2%	4
Other (please specify)		2.8%	9

About three-fifths (59.5%) of the Comcast subscribers said they use Comcast’s on-screen program guide “frequently” or “always” to decide what to watch.

8. How often do you use Comcast's on-screen program guide to decide what to watch?			
		Response Percent	Response Count
Never		15.0%	48
Occasionally		25.5%	82
Frequently		37.1%	119
Always		22.4%	72
Don't Know		0.0%	0

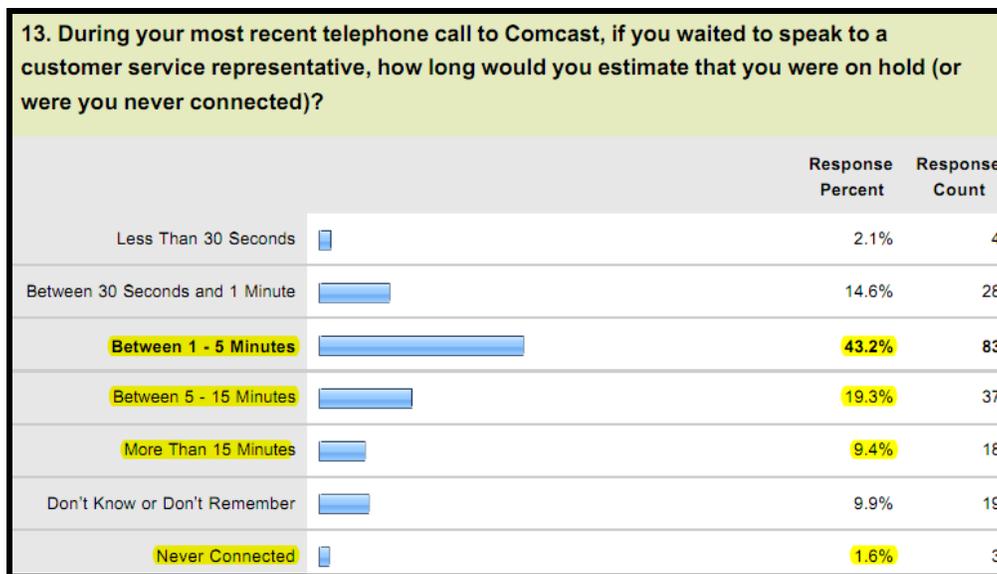
46.6% of the Comcast cable TV customers also subscribe to Comcast’s Internet and telephone service, 37.8% also subscribe to Comcast’s Internet service (but not telephone service), and 2.2% also subscribe to Comcast’s telephone service (but not Internet service).

Comcast subscribers were then asked to indicate their level of satisfaction with Comcast’s service in 12 different areas. Services with the most “Very Good” or “Good” ratings were *quality of the picture and sound* (86.7%) and *reliability of the Comcast cable TV service* (82%). Services with the most “Very Poor” or “Poor” ratings were *rates charged by Comcast for cable TV service* (50.5%) and *ability to quickly speak to a customer service representative when you call Comcast* (21.8%), followed by *ease of getting problems repaired or resolved by Comcast* (19.4%) and *ease of getting services installed or changed by Comcast* (16.9%). The chart below displays their responses to each of the service areas.

10. Please indicate your level of satisfaction with Comcast's CABLE TV service (NOT telephone or Internet service) in the following areas. (If the item is not applicable to you, indicate that by checking "N/A.")								
	VERY GOOD	GOOD	FAIR	POOR	VERY POOR	DON'T KNOW	N/A	Rating Count
Quality of the picture and sound	45.3% (140)	41.4% (128)	7.8% (24)	2.6% (8)	1.6% (5)	0.6% (2)	0.6% (2)	309
Reliability of Comcast's CABLE TV service	34.6% (106)	47.4% (145)	12.4% (38)	2.0% (6)	1.6% (5)	1.3% (4)	0.7% (2)	306
Number and variety of channels offered	30.4% (94)	41.4% (128)	18.4% (57)	5.5% (17)	1.0% (3)	1.0% (3)	2.3% (7)	309
Helpfulness of Comcast's customer service representatives	23.5% (72)	31.6% (97)	22.1% (68)	7.8% (24)	7.2% (22)	3.3% (10)	4.6% (14)	307
The rates charged by Comcast for CABLE TV service	4.5% (14)	9.1% (28)	31.4% (97)	27.2% (84)	23.3% (72)	2.6% (8)	1.9% (6)	309
Ease of getting services installed or changed by Comcast	11.4% (35)	33.4% (103)	26.3% (81)	10.4% (32)	6.5% (20)	4.5% (14)	7.5% (23)	308
Ability of Comcast to provide an accurate, written confirmation of your order	9.2% (28)	35.4% (108)	26.9% (82)	3.9% (12)	2.3% (7)	10.2% (31)	12.1% (37)	305
Ability of Comcast to provide bills that are accurate and easy to understand	13.0% (40)	40.7% (125)	25.4% (78)	6.5% (20)	8.1% (25)	3.9% (12)	2.3% (7)	307
Fairness of Comcast's policies regarding late fees	6.2% (19)	21.0% (64)	19.3% (59)	3.6% (11)	4.6% (14)	20.0% (61)	25.2% (77)	305
Ease of getting problems repaired or resolved by Comcast	11.2% (34)	33.6% (102)	28.6% (87)	10.5% (32)	8.9% (27)	3.6% (11)	3.6% (11)	304
Ability to quickly speak to a customer service representative when you call Comcast	12.1% (37)	30.9% (95)	28.7% (88)	10.7% (33)	11.1% (34)	2.3% (7)	4.2% (13)	307
The ability of Comcast to respond to a service call within the promised time period	14.0% (43)	39.0% (120)	22.4% (69)	6.5% (20)	3.2% (10)	5.2% (16)	9.7% (30)	308

When the focus group and online survey respondents who subscribe to the Comcast cable TV service were asked to indicate their “overall” level of satisfaction with Comcast, over two-thirds of them indicated that they were “Very Satisfied” (25.7%) or “Somewhat Satisfied” (43%), while 12.7% said they were “Somewhat Dissatisfied” and 8.1% said they were “Very Dissatisfied.”

About three-fourths (74.9%) of the Comcast subscriber-respondents said that they had tried to contact Comcast by telephone during the past year. Of these respondents, 82.4% of them indicated that their issue was not resolved using the Comcast automated telephone response system, without talking to a person. When these individuals were asked how long they would estimate that they waited to speak to a customer service representative, 73.5% indicated that they had to wait one minute or longer, or were never connected, as shown in the chart below.



Over a third (34.4%) of the Comcast subscriber-respondents who were connected to a customer service representative by telephone indicated that *the CSR was unable to resolve their issue*; and only 29.2% of this group said it was due to the need for a service call.

Over half (58.8%) of the Comcast subscriber-respondents indicated that they had gone to the Comcast office in Inver Grove Heights or other nearby office during the past year. A very large majority (87.2%) of these respondents said that *having an office in Inver Grove Heights or somewhere in the seven-city Northern Dakota County area* is “Very Important” or “Important” to them; 83.5% said they went to the office to *return or pick up equipment*; 67.6% said they had to wait in line for *fifteen minutes or less*, and 84.8% said that *Comcast was able to solve their problem*.

The respondents could also provide any open-ended comments about the Comcast cable TV service and customer service. All of the 166 comments are provided in Appendix 2a to this report. Negative comments outnumbered positive/neutral comments by about three to one. Common criticisms included too high fees charged by Comcast and having to pay for channels that they never watched.

The focus group and online questionnaire respondents who do not subscribe (or have never subscribed) to the Comcast cable TV service in the NDC4 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*” (24%), followed by “I switched to a satellite TV service” (20.9%). Of those who had never subscribed to the Comcast cable TV service, the most frequently indicated reason was “I’m not interested – I don’t watch TV enough to make it worthwhile” (28.1%), followed by “Comcast’s cable TV service is too expensive” (24.7%) and “I subscribe to program services delivered through the Internet” (23.6%).

Next, all respondents were asked if they were aware of the channels and programming delivered by Town Square Television (“TST”) -- i.e., local community news, sports, music, events, and talk shows on Channel 14; public access and multifaith access programming on Channels 15 and 16; local government, Classic Arts Showcase, and NASA programming on Channels 18 and 19; educational programs, school board meetings, and Deutsche Welle on Channel 20; and community bulletin board & program schedule listings on Channel 21. Over three-fourths (80.5%) of them (including respondents who do not subscribe to Comcast) answered “Yes.” Those who were aware of these channels were asked a series of follow-up questions about them.

First, when asked how often they watched TST Community Channel 14, 45% said they watched this channel at least once per month, as illustrated below:

27. Town Square Television Community Channel 14 features local news, sports, music, community events, talk shows, and many other programs created or obtained by Town Square Television staff. How often do you watch Town Square Television Community Channel 14?

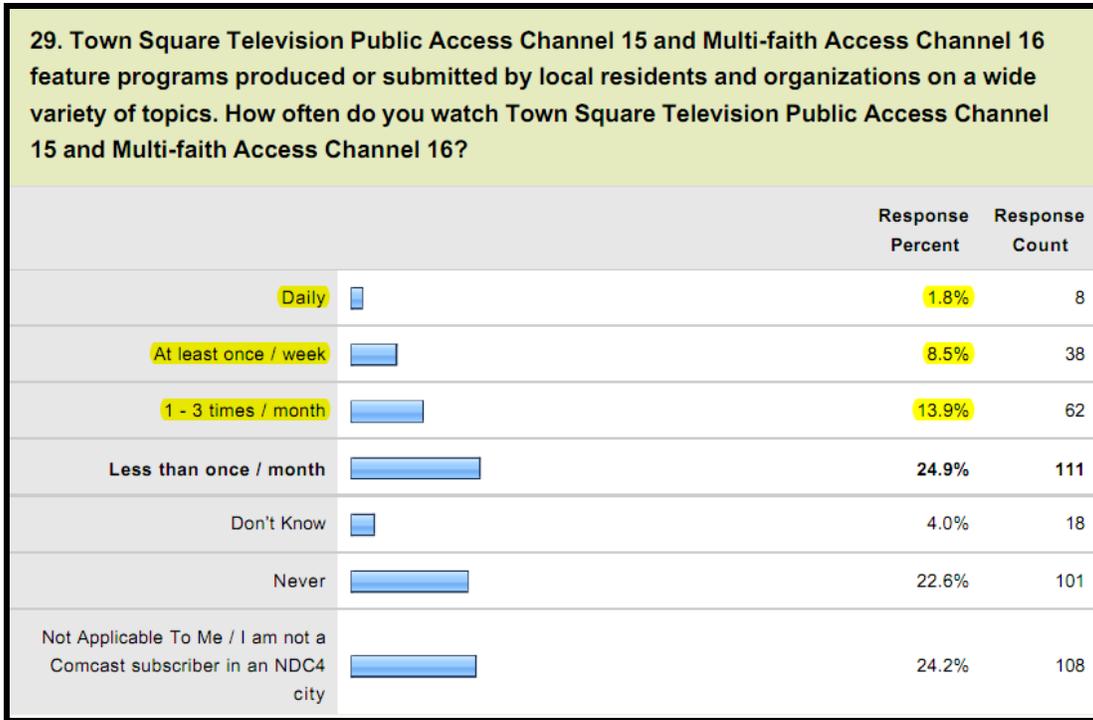
		Response Percent	Response Count
Daily		7.1%	32
At least once / week		15.4%	69
1 - 3 times / month		22.5%	101
Less than once / month		22.5%	101
Don't Know		1.3%	6
Never		8.2%	37
Not Applicable To Me / I am not a Comcast subscriber in an NDC4 city		22.9%	103

Those who had watched Community Channel 14 were asked to indicate their opinion of three statements about this channel. Very large majorities (86-92%) said they “strongly agree” or “agree” with each of these statements, as illustrated below.

28. Indicate your opinion of these statements about Town Square Television Community Channel 14:

	STRONGLY AGREE	AGREE	DISAGREE	STRONGLY DISAGREE	DON'T KNOW	Rating Count
Provides worthwhile community programming	47.1% (146)	45.2% (140)	1.6% (5)	0.3% (1)	5.8% (18)	310
Provides valuable information	40.3% (124)	50.3% (155)	1.3% (4)	0.3% (1)	7.8% (24)	308
Provides programs that are interesting to watch	32.1% (99)	54.2% (167)	5.5% (17)	1.0% (3)	7.1% (22)	308

Those who were aware of the TST channels were then asked how often they watched Public Access Channel 15 and Multifaith Access Channel 16. About one-fourth (24.2%) said they watched these channels at least once per month, as illustrated below:

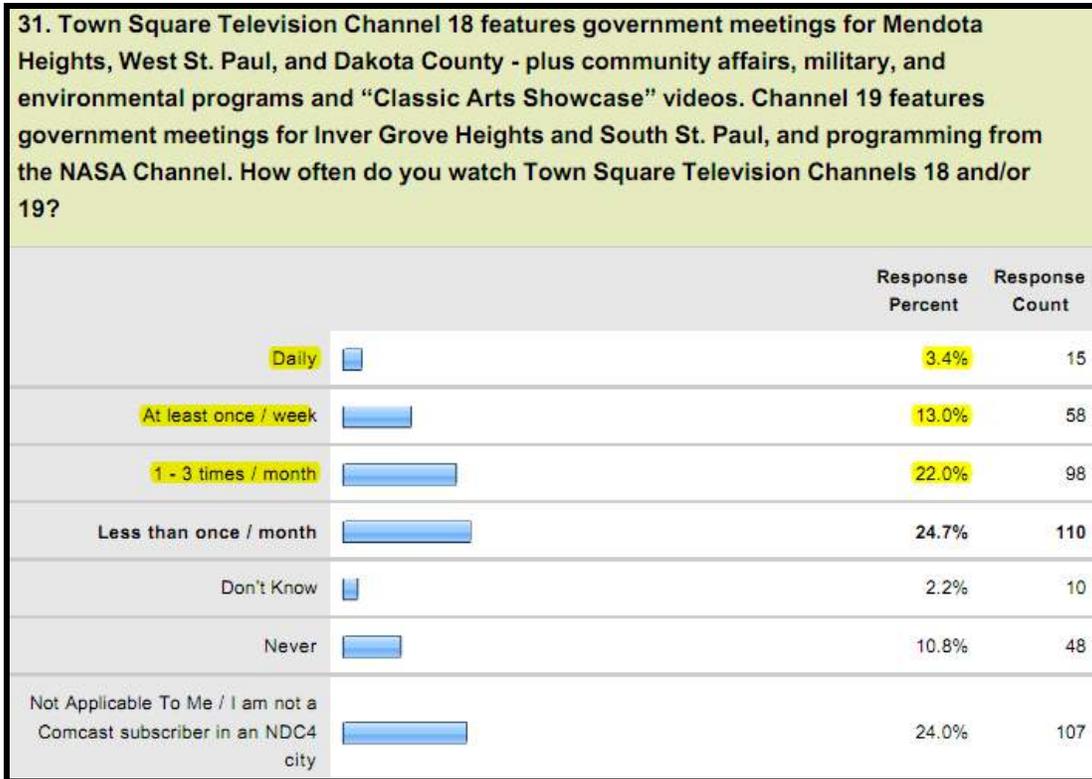


Those who had watched Public Access Channel 15 and Multifaith Access Channel 16 were asked to indicate their opinion of three statements about these channels. Large majorities (72-80%) said they “strongly agree” or “agree” with each of these statements, as illustrated below.

30. Indicate your opinion of these statements about Town Square Television Public Access Channel 15 and Multi-faith Access Channel 16:

	STRONGLY AGREE	AGREE	DISAGREE	STRONGLY DISAGREE	DON'T KNOW	Rating Count
Provide worthwhile community programming	30.9% (73)	48.7% (115)	4.2% (10)	0.0% (0)	16.1% (38)	236
Provide valuable information	28.1% (66)	46.8% (110)	6.0% (14)	0.4% (1)	18.7% (44)	235
Provide programs that are interesting to watch	23.1% (54)	48.7% (114)	8.5% (20)	0.9% (2)	18.8% (44)	234

Next, those who were aware of the TST channels were asked how often they watched Government Channels 18 and 19. Over one-third (38.4%) said they watched these channels at least once per month, as illustrated below:

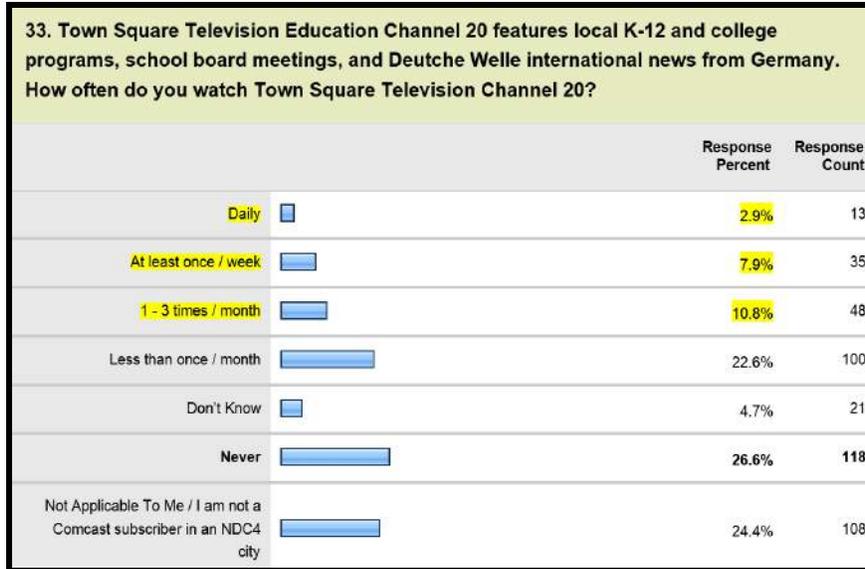


Those who had watched Government Channels 18 and 19 were asked to indicate their opinion of three statements about these channels. Very large majorities (86-90%) said they “*strongly agree*” or “*agree*” with each of these statements, as illustrated below.

32. Indicate your opinion of these statements about Town Square Television channels 18 and 19:

	STRONGLY AGREE	AGREE	DISAGREE	STRONGLY DISAGREE	DON'T KNOW	Rating Count
Provide worthwhile local government programming	46.6% (136)	43.8% (128)	1.4% (4)	0.0% (0)	8.2% (24)	292
Provide valuable information	42.6% (124)	47.4% (138)	1.4% (4)	0.0% (0)	8.6% (25)	291
Provide programming that is interesting to watch	34.0% (99)	51.9% (151)	4.1% (12)	0.7% (2)	9.3% (27)	291

Next, those who were aware of the TST channels were asked how often they watched Education Channel 20. Over one-fifth (21.6%) said they watched this channel at least once per month, as shown below:



Those who had watched Education Channel 20 were asked to indicate their opinion of three statements about this channel. Large majorities (79-83%) said they “strongly agree” or “agree” with each of these statements, as shown below.

34. Indicate your opinion of these statements about Town Square Television channel 20:

	STRONGLY AGREE	AGREE	DISAGREE	STRONGLY DISAGREE	DON'T KNOW	Rating Count
Provides worthwhile educational programming	34.3% (73)	48.4% (103)	1.9% (4)	0.0% (0)	15.5% (33)	213
Provides valuable information	36.4% (78)	44.9% (96)	3.7% (8)	0.0% (0)	15.0% (32)	214
Provides programming that is interesting to watch	31.5% (67)	47.9% (102)	4.2% (9)	0.5% (1)	16.0% (34)	213

Next, those who were aware of the TST channels were asked how often they watched TST Channel 21. Over one-fourth (26.6%) said they watched this channel at least once per month, as illustrated below:

35. Town Square Television Channel 21 features bulletin board listings of events and organizations, program schedule listings for all Town Square Television channels, and locally-sourced weather and traffic information. How often do you watch Town Square Television Channel 21?

	Response Percent	Response Count
Daily	4.6%	20
At least once / week	10.0%	43
1 - 3 times / month	12.0%	52
Less than once / month	18.8%	81
Don't Know	4.9%	21
Never	25.7%	111
Not Applicable To Me / I am not a Comcast subscriber in an NDC4 city	24.1%	104

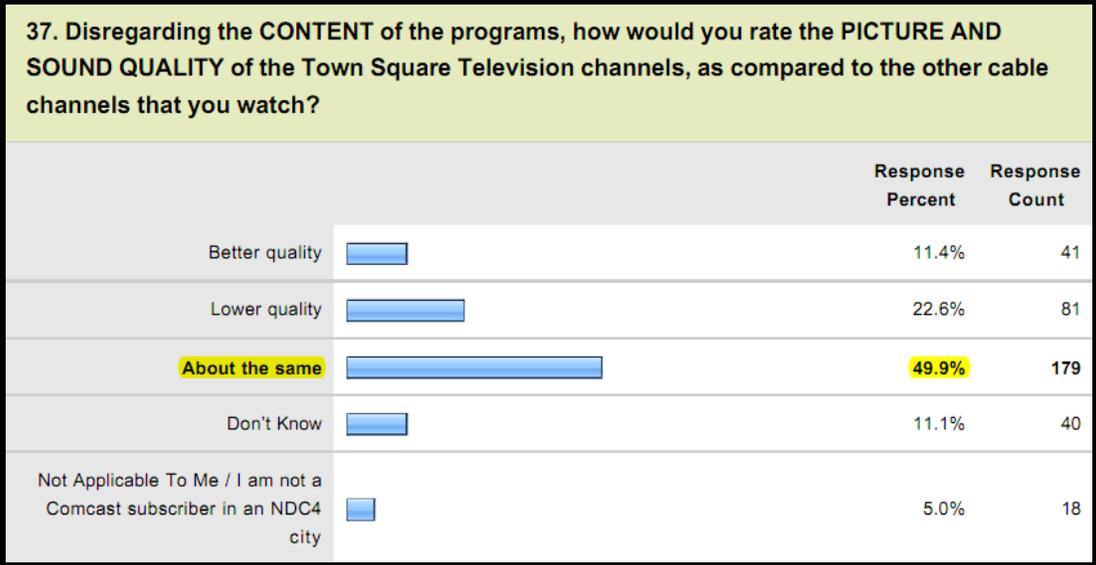
All survey respondents who said they were aware of the TST channels were then asked how they found out about the programming on these channels.¹ As illustrated below, the most frequent method was “channel surfing,” followed by the “TST website.”

36. How do you find out about programs that you want to watch on the Town Square Television channels? (PLEASE CHECK ALL THAT APPLY.)

	Response Percent	Response Count
www.townsquare.tv website	35.0%	153
City or other websites	16.5%	72
Channel 21 listings	16.0%	70
At events	9.2%	40
Newspaper	7.8%	34
"Channel Surfing"	43.7%	191
Friends & Family	19.0%	83
Facebook	11.7%	51
Twitter	2.3%	10
Don't Know	4.8%	21
Not Applicable To Me / I am not a Comcast subscriber in an NDC4 city	17.6%	77

¹ Comcast does not provide information about programming on any of the TST channels on its on-screen program guide, the most frequently used source of programming information by the survey respondents.

Next, these survey respondents were asked, disregarding the content of programs on these channels, to rate the picture and sound quality of these channels, as compared to the other cable channels that they watch. As illustrated below, about half (49.9%) of them answered “about the same,” followed by 22.6% who answered “lower quality.”



Over one-third (37.4%) of the respondents who were aware of the TST channels said they had watched TST programs on the townsquare.tv website. About one fourth of them (24.1%) were not aware of this option.

Of those who had watched TST programs on the townsquare.tv website, over one-fourth (29%) watched them on a mobile device, including a smart phone or tablet.

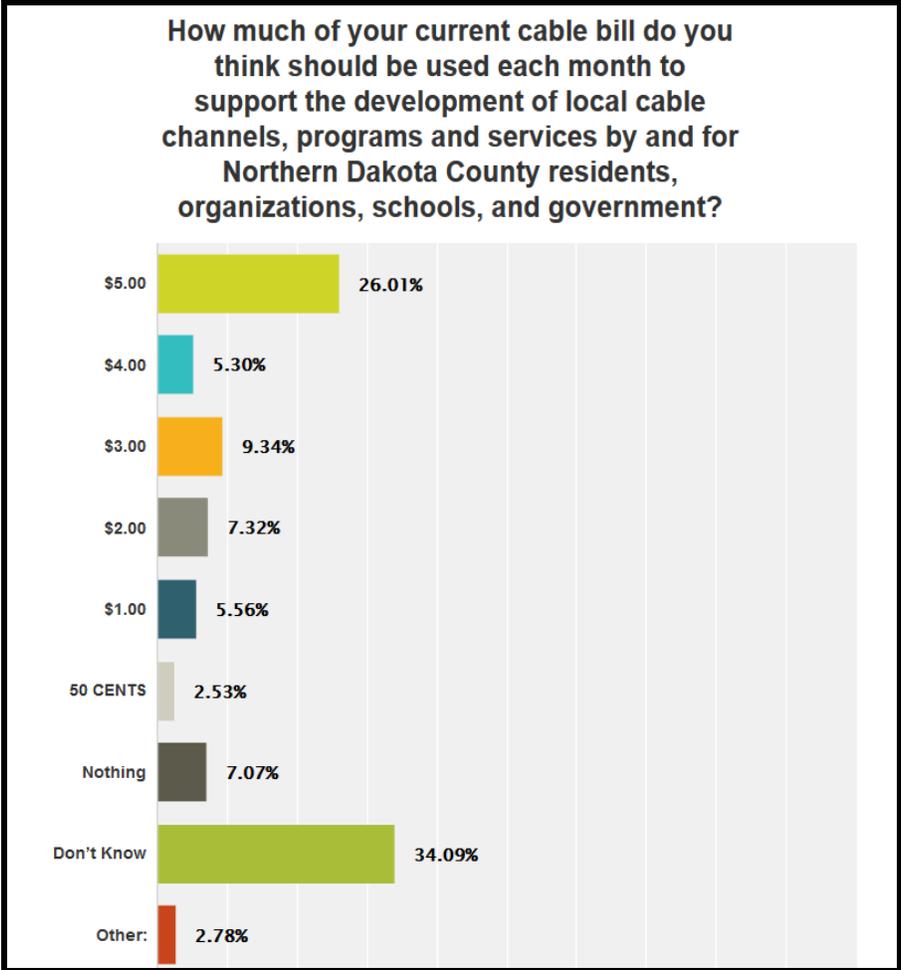
Respondents who had watched a channel delivered by TST were provided a list of programs that appear on these channels and were asked to indicate how many times they had watched them. The chart below display their responses, and shows that most often indicated as being watched at least once per month were: (1) “City Council or other Local Government Meetings” [39.1%], (2) “Insight 7” [25.8%], and (3) “Game of the Week” [21.8%].

40. Please indicate if you have ever watched any of the following programs that are regularly shown on the Town Square Television channels -- or the townsquare.tv website -- and how often you watch them. (If this item is not applicable to you, indicate that by checking “N/A.”)

	NEVER	LESS THAN MONTHLY	1 – 3 TIMES PER MONTH	AT LEAST WEEKLY	DON'T KNOW	N/A	Rating Count
Insight 7	31.2% (124)	25.4% (101)	18.3% (73)	7.5% (30)	2.5% (10)	15.1% (60)	398
Game of the Week	38.8% (155)	22.3% (89)	13.3% (53)	8.5% (34)	2.5% (10)	14.5% (58)	399
SportsZone	43.1% (168)	23.3% (91)	10.0% (39)	5.9% (23)	2.3% (9)	15.4% (60)	390
Girl Talk	54.1% (209)	12.4% (48)	10.1% (39)	3.4% (13)	3.1% (12)	16.8% (65)	388
Amp It Up	56.7% (221)	9.2% (36)	10.5% (41)	3.6% (14)	3.1% (12)	16.9% (66)	390
Positive Parenting	59.8% (228)	8.9% (34)	7.9% (30)	2.1% (8)	3.7% (14)	17.6% (67)	381
City Council or other Local Government Meetings	15.6% (65)	32.0% (133)	27.6% (115)	11.5% (48)	1.7% (7)	11.5% (48)	416
School Board Meetings	36.8% (146)	30.0% (119)	14.9% (59)	3.5% (14)	1.5% (6)	13.4% (53)	397
School Music/Drama Performances	33.9% (135)	32.2% (128)	14.3% (57)	4.8% (19)	2.3% (9)	12.6% (50)	398
Any Faith Programs or Services on Channel 16	53.6% (209)	15.6% (61)	8.2% (32)	5.1% (20)	1.3% (5)	16.2% (63)	390

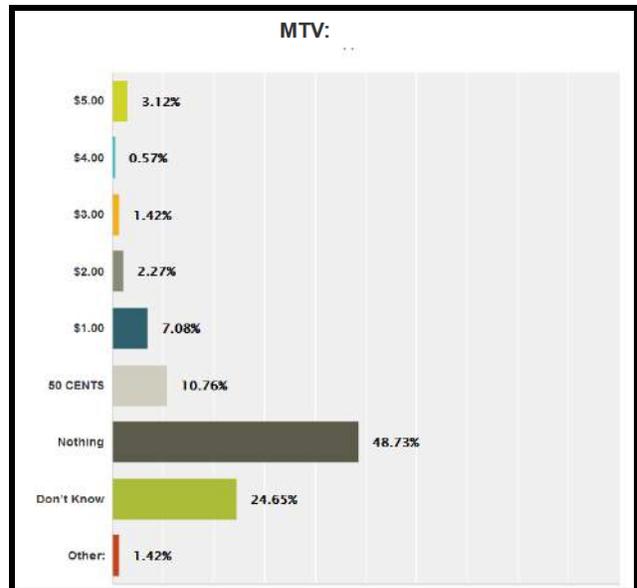
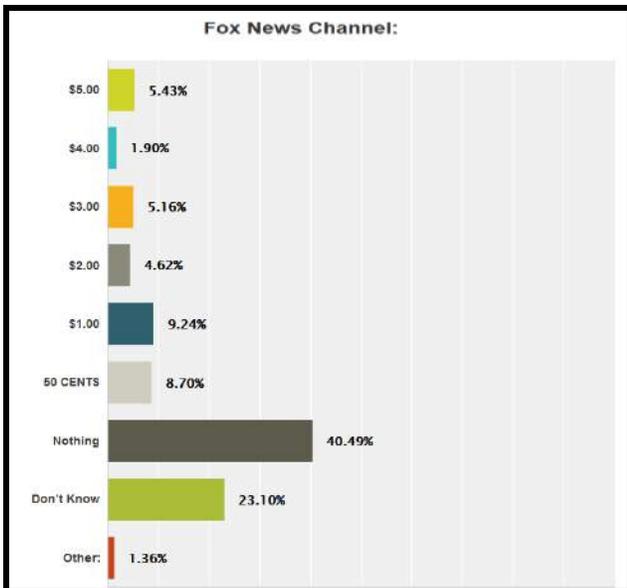
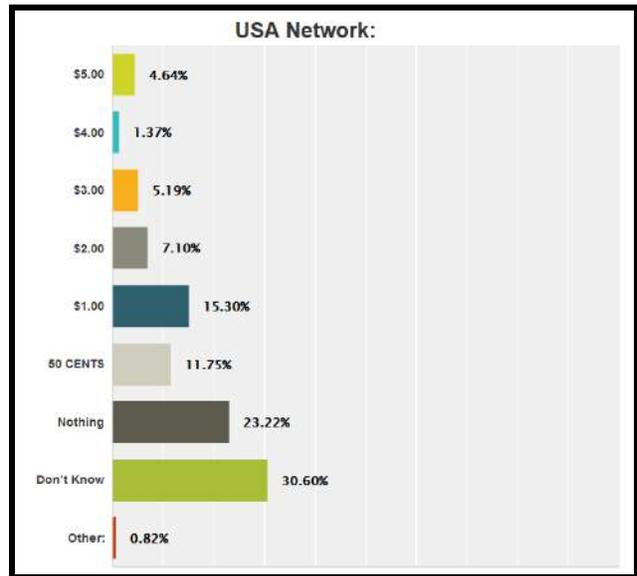
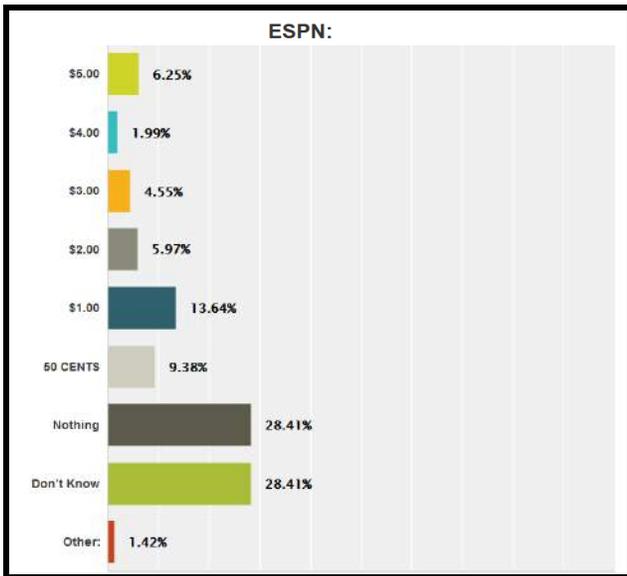
These respondents were provided a list of four programs that appear on the TST channels quarterly or annually, and were asked if they had ever watched them. “Parades, Coronations, & Festivals” had been seen by 60.6% of them, followed by “Candidate Information or Election Results” (58.3%), “High School or College Graduations” (44%) and “Community Parks Connection” (36.4%). Finally, the respondents were provided a list of four satellite-delivered programs that appear on the TST channels, and were asked to indicate how many times they had watched them. The at least once per month responses for these programs were as follows: “NASA programs” (16.2%); “Classic Arts Showcase” (14.6%); “Deutsche Welle” (10.3%); and “Pentagon Channel programs” (8.8%).

In the next section of the focus group/on-line survey, all survey respondents were asked to indicate the amount of their monthly cable bill that should be used to support the development of local cable channels, programs and services by and for Northern Dakota County residents, organizations, schools, and government. The chart below displays their responses (*respondents who indicated “not applicable to me” as their answer to this question are not included in the responses to this question*). Nearly one-half (48%) of these respondents indicated two dollars or more -- a significantly higher perceived value than for any of the commercial channels tested, as detailed on the next page.

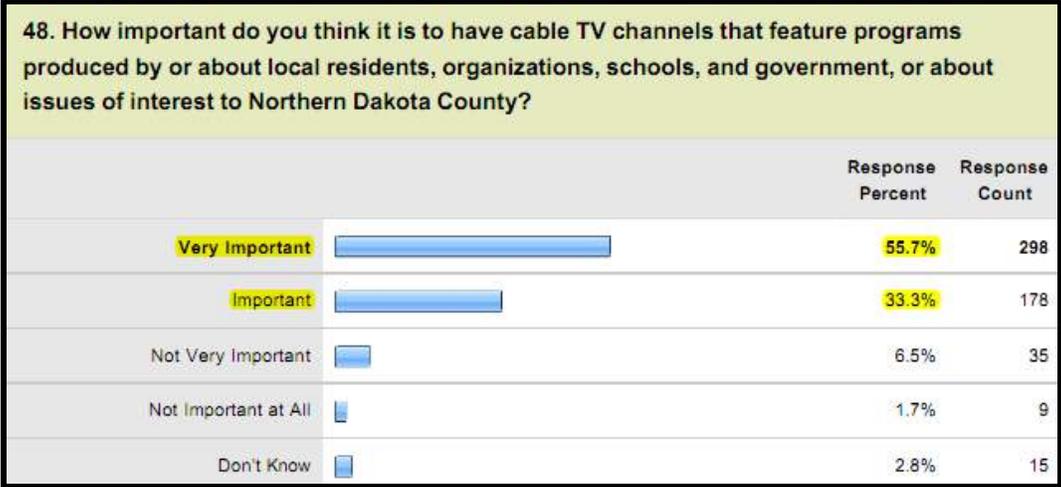


A similar question was asked of Comcast subscribers regarding the amount of their monthly cable bill that should be used to pay for four cable programming services: ESPN, Fox News Channel, USA Network and MTV. The percentages of these respondents who indicated two dollars or more for each of these services were as follows (again, 48% indicated two dollars or more to support the development of local cable channels, programs and services):

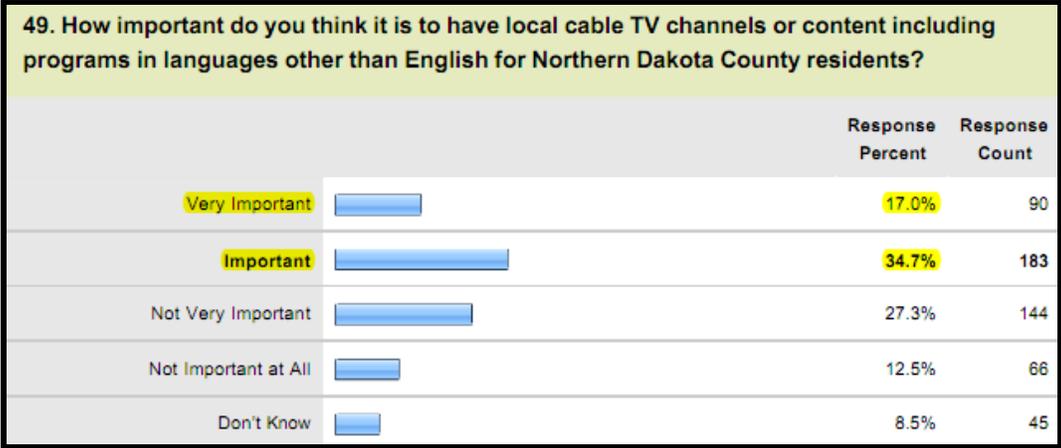
- ESPN – 18.8%
- USA Network – 18.3%
- Fox News Channel – 17.1%
- MTV – 7.4%



All survey/questionnaire respondents were asked how important they think it is to have cable TV channels that feature programs produced by or about local residents, organizations, schools, and government, or about issues of interest to Northern Dakota County. Very high percentages of them said these local channels and services are “Very Important” (55.7%) or “Important” (33.3%), as illustrated below.



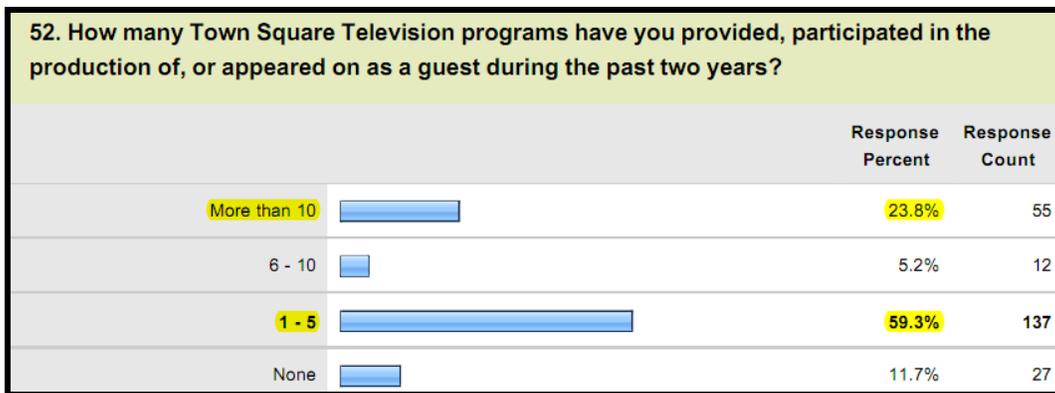
Next, all survey/questionnaire respondents were asked how important they think it is to have local cable TV channels or content including programs in languages other than English for Northern Dakota County residents. A majority said this is “Very Important” (17%) or “Important” (34.7%), as illustrated below.



All survey/questionnaire respondents were then asked two Yes/No questions. Following are those questions and the percentage of respondents who answered “Yes.”

- Do you know you, or the organizations you are involved with, can produce programs to show on a Town Square Television channel and on the Internet?
 “Yes” = 67.6% (359 of 531 respondents to this question)
- Have you ever provided or participated in the production of a program, or appeared as a guest on a program shown on a Town Square Television channel and the townsquare.tv website?
 “Yes” = 43% (230 of 535 respondents to this question)

The following series of questions were asked of the 230 survey/questionnaire respondents who said that they had provided or participated in the production of a program, or appeared as a guest on a program to show on a channel delivered by TST. First, when asked to indicate how many programs they had helped to produce or appeared on as a guest on a TST channel during the past two years, “1-5” was the largest response grouping, followed by “more than 10,” as illustrated below.



Next, these 230 survey/questionnaire respondents were asked about the “impact” of their programs on viewers. The most common reply was about *being recognized in public by viewers*, followed by *no known impact*, *viewers attending an event promoted in their program*, and *getting calls from viewers for more information*.

53. What was the impact of your program(s) on your organization, collaborators, supporters, and the viewing audience? PLEASE CHECK ALL THAT APPLY:			Response Percent	Response Count
I/We got requests from viewers and supporters for more information		25.8%	58	
Viewers and supporters got involved in the issue(s) presented in my/our program		24.0%	54	
Viewers and supporters said they attended an event that was promoted in my/our program		27.1%	61	
Participants who appeared on my/our program were recognized in public by viewers		34.7%	78	
Traffic on our web site or social media increased		16.9%	38	
Improved visibility or fundraising efforts or assisted in receiving an award		21.8%	49	
No impact that I know of		31.6%	71	

When these survey/questionnaire respondents were asked to indicate how readily available was the TST production equipment when they wanted to produce a program, over two-thirds of them answered “always” or “usually.”

54. How readily available were the Town Square Television production facilities and equipment when you wanted to participate in the production of a program (or material for a program)?			Response Percent	Response Count
Always		41.2%	94	
Usually		26.8%	61	
Sometimes		3.5%	8	
Rarely		0.0%	0	
Not Applicable		28.5%	65	

When the respondents who had used the TST production equipment were asked to describe the typical condition of that equipment when they had used it, a very large majority of them (87.8%) answered “excellent” or “good.”

55. How would you describe the typical condition of the Town Square Television production facilities and equipment items when you have used them?			
		Response Percent	Response Count
Excellent		48.8%	80
Good		39.0%	64
Fair		6.1%	10
Poor		0.0%	0
Very Poor		0.0%	0
Not Applicable		6.1%	10

Next, the respondents who had used the TST production equipment were asked if the quantity and technical capability of the equipment met their current needs. A very large majority (86.7%) answered “Yes.” The eight respondents who answered “No” were provided a list of possible “improvements” and were asked to indicate what they need. Most often indicated were “*high definition equipment*” (by six of these eight people), followed by “*cameras with more advanced capability,*” which was indicated by five of them.

Next, the survey/questionnaire respondents who said that they had provided or participated in the production of a program were asked how important it is for the Town Square Television channels to have the ability to transmit video programming live from locations throughout Northern Dakota County, including places like a community center, library, school, sports field or stadium, or parade route. Nearly 90% of these respondents indicated that this was “Very Important” (53.7%) or “Important” (34.8%).

Finally, the survey/questionnaire respondents who had provided or participated in the production of a TST program were asked to rate the quality of several services provided by the TST staff. Their responses are shown in the table below. The services with the most “excellent” or “good” ratings were *production and other training services* (76.2%) and *playback of your programs on cable TV* (71%). The service with the fewest “excellent” or “good” ratings was *assistance to help you promote your program(s)* (57.5%).

59. Please rate the quality of the following services provided by the Town Square Television staff:							
	EXCELLENT	GOOD	FAIR	POOR	VERY POOR	NOT APPLICABLE	Rating Count
Efforts to inform residents about Town Square Television equipment, services and programming	39.1% (88)	31.6% (71)	12.4% (28)	1.8% (4)	0.4% (1)	14.7% (33)	225
Production and other training services	44.4% (99)	31.8% (71)	5.4% (12)	0.0% (0)	0.0% (0)	18.4% (41)	223
Assistance in planning the creation of your program(s)	39.3% (88)	25.9% (58)	4.5% (10)	1.3% (3)	0.0% (0)	29.0% (65)	224
Assistance in reserving production equipment	33.6% (75)	24.2% (54)	2.7% (6)	0.0% (0)	0.0% (0)	39.5% (88)	223
Assistance in the production of your program(s)	39.4% (87)	25.3% (56)	3.6% (8)	0.0% (0)	0.0% (0)	31.7% (70)	221
Maintenance of production equipment	35.5% (78)	29.5% (65)	2.7% (6)	0.0% (0)	0.0% (0)	32.3% (71)	220
Advice to help you improve your program(s)	34.4% (75)	26.1% (57)	4.6% (10)	0.9% (2)	0.5% (1)	33.5% (73)	218
Assistance to help you promote your program(s)	33.3% (73)	24.2% (53)	8.2% (18)	1.4% (3)	0.5% (1)	32.4% (71)	219
Playback of your programs on cable TV	45.7% (101)	25.3% (56)	2.7% (6)	0.9% (2)	0.0% (0)	25.3% (56)	221

All survey/questionnaire respondents were invited to provide any other comments about the programming and services offered by TST, and suggestions to improve the programming and services. All of the 150 comments are provided in Appendix 2b to this report. Positive/neutral comments outnumbered negative comments by nearly twelve to one.

All survey respondents were provided a list of several media-related resources and services (each of which are provided by other community media centers in the US), and were asked if they would like to use or participate in any of them if offered in the future. About 60% or more of the respondents answered “Yes” or “Maybe” to four of the choices, led by “Free access to computers and the Internet” (63.4%) and “Training in the use of computers and software” (62.5%), as well as “Advanced media production training” (60.8%) and “Training in the use of your own home camera and/or editing software” (59.9%).

61. Would you like to use or participate in any of the following types of media-related resources or services, if they were offered in the future?				
	YES	NO	MAYBE	Rating Count
Free access to computers and the Internet	40.1% (205)	36.6% (187)	23.3% (119)	511
Training in the use of computers and software	38.7% (198)	37.5% (192)	23.8% (122)	512
Training in the use of social media (e.g., Facebook, Twitter, LinkedIn, etc.)	31.0% (157)	47.2% (239)	21.7% (110)	506
Advanced media production training (e.g., screenwriting, documentary production, advanced lighting/audio techniques, how to upload your videos to YouTube, etc.)	37.9% (192)	39.3% (199)	22.9% (116)	507
Citizen journalism (training and involvement in collecting, analyzing and reporting local news and information)	31.3% (160)	49.1% (251)	19.6% (100)	511
Training in the use of your own home camera and/or editing software	38.0% (194)	40.1% (205)	21.9% (112)	511

All survey/questionnaire respondents were then provided a list of several types of local programs or services, and were asked to indicate their level of interest in them. The table provided on the following two pages displays their responses. The items with the most “very interested” and “interested” indications were “local news and information” (71.4%), “live coverage of local events (sports, concerts, etc.)” (68%), “community festivals, neighborhood events” (67.5%), “programs about local history, arts and artists” (67%), “City government/public agency meetings” (64%), “program schedules for the TST channels on Comcast’s on-screen program guide” (61.9%), “City government informational programs” (60.7%), and “local sports and recreational activities” (60.7%).

Levels of Interest in Specified Types of Local Programs or Services

62. How interested are you in the following types of local cable TV programs or services:					
	VERY INTERESTED	INTERESTED	NEUTRAL	NOT VERY INTERESTED	NOT AT ALL INTERESTED
Community festivals, neighborhood events	28.5% (145)	39.0% (198)	20.3% (103)	8.9% (45)	3.3% (17)
Local programming channels in high definition	28.0% (140)	27.6% (138)	29.0% (145)	10.2% (51)	5.2% (26)
Local programs on Comcast's video-on-demand service	25.9% (128)	30.5% (151)	26.3% (130)	10.1% (50)	7.3% (36)
Program schedules for the Town Square Television channels on Comcast's on-screen program guide	29.2% (144)	32.7% (161)	23.9% (118)	7.7% (38)	6.5% (32)
Educational/instructional programs from local schools	20.1% (101)	35.1% (176)	29.5% (148)	9.8% (49)	5.6% (28)
Environmental programs	18.9% (94)	32.7% (163)	31.3% (156)	11.4% (57)	5.6% (28)
Ethnic and cultural programs	15.4% (76)	28.7% (141)	34.1% (168)	14.2% (70)	7.5% (37)
City government/public agency meetings	27.8% (139)	36.2% (181)	21.4% (107)	10.0% (50)	4.6% (23)
City government informational programs	24.7% (123)	36.1% (180)	23.1% (115)	11.2% (56)	4.8% (24)
Health and fitness programs	16.0% (79)	36.8% (182)	30.7% (152)	10.9% (54)	5.7% (28)
Informational programs about services and activities of Northern Dakota County organizations and clubs	19.5% (97)	39.6% (197)	25.9% (129)	10.0% (50)	5.0% (25)
Live coverage of local events (sports, concerts, etc.)	31.3% (157)	36.7% (184)	19.9% (100)	6.8% (34)	5.4% (27)
Live interactive/call-in shows on local or current issues	18.4% (92)	31.5% (157)	33.5% (167)	9.8% (49)	6.8% (34)
Local church services and spiritual programs	11.5% (57)	22.7% (112)	33.0% (163)	17.4% (86)	15.4% (76)
Local news and information	27.7% (139)	43.7% (219)	19.4% (97)	5.0% (25)	4.2% (21)
Local sports and recreational activities	22.0% (109)	38.7% (192)	25.6% (127)	7.7% (38)	6.0% (30)
Programs about local history, arts and artists	29.7% (148)	37.3% (186)	21.5% (107)	7.4% (37)	4.0% (20)
Programming for children	20.1% (100)	28.9% (144)	32.5% (162)	10.8% (54)	7.6% (38)

Levels of Interest in Specified Types of Local Programs or Services (continued)

62. How interested are you in the following types of local cable TV programs or services:					
	VERY INTERESTED	INTERESTED	NEUTRAL	NOT VERY INTERESTED	NOT AT ALL INTERESTED
Senior citizen activities and concerns	16.2% (81)	27.8% (139)	34.4% (172)	14.0% (70)	7.6% (38)
Youth-produced programs	18.2% (91)	28.9% (144)	32.7% (163)	12.6% (63)	7.6% (38)
Programs in languages other than English	9.6% (48)	15.9% (79)	35.3% (176)	19.1% (95)	20.1% (100)
Programs produced in other communities of the Greater Twin Cities region	19.0% (95)	27.4% (137)	32.0% (160)	14.0% (70)	7.6% (38)

Finally, all survey/questionnaire respondents were provided a list of several types of information sources, and were asked to indicate how often they use them to find out about the services available and activities that occur in Northern Dakota County. The sources with the most “frequently” and “always” indications were “*on-line news sites*” (38.7%) “*social media*” (37.2%), and “*websites of local organizations*” (35.6%).

63. How often do you use the following information sources to find out about the services available and activities that occur in Northern Dakota County:					
	NEVER	OCCASIONALLY	FREQUENTLY	ALWAYS	Rating Count
Social media (e.g., Facebook, Twitter, text messages, email)	28.1% (142)	34.8% (176)	25.7% (130)	11.5% (58)	506
On-line news sites (e.g., patch.com, twincities.com, startribune.com, southwestreviewnews.com, South St. Paul Voice, etc.)	18.2% (91)	43.1% (215)	29.5% (147)	9.2% (46)	499
Websites of local organizations	19.7% (98)	44.7% (222)	29.6% (147)	6.0% (30)	497
Town Square Television channels 14, 15, 16, 18, 19, 20 & 21	41.9% (208)	40.5% (201)	14.7% (73)	2.8% (14)	496
Flyers and posters placed on bulletin boards, etc.	35.5% (177)	50.7% (253)	12.0% (60)	1.8% (9)	499
Local newspaper articles and advertisements	18.5% (93)	51.8% (260)	26.1% (131)	3.6% (18)	502
Local radio station stories and advertisements	29.7% (149)	47.1% (236)	19.2% (96)	4.0% (20)	501
Local broadcast TV station stories and advertisements	26.5% (132)	46.9% (234)	22.0% (110)	4.6% (23)	499
Newsletters and other materials via US Mail	24.0% (120)	52.1% (260)	19.4% (97)	4.4% (22)	499

C. SUMMARY OF DISCUSSIONS AND BRAINSTORMING DURING COMMUNITY FOCUS GROUP SESSIONS.

As mentioned earlier in this report, a portion of each of the focus group sessions was set aside to allow participants to engage in a brainstorming process. During this time, participants were asked to consider and discuss a series of questions, including:

- What are the Key Local Issues Facing You, Your Neighbors, Community Organizations, NDC4 Local Governments, and Schools in the Next 10 Years?
- What Makes it Difficult for Community Organizations, City Government Departments, or Schools to Effectively Communicate Information to Their Constituencies and the Residents of NDC4 Member Cities?
- How Would You Like to Use the Cable System, PEG Access Channels, a Community Media Center, and the I-Net to Educate, Inform, and Entertain NDC4 residents?
- What would make easier for You (or your Organization, City Government Department, or School) to Use PEG Access Channels, a Community Media Center or the Cable System?

The information presented on the following pages is an analysis and synthesis of the information gathered through the brainstorming process. It is the result of a detailed review of the responses to the brainstorming questions discussed during each focus group meeting. Consequently, The Buske Group was able to identify common community needs, interests, and concerns. The areas of agreement and groupings of responses to each question are presented in the analysis that follows. A copy of the notes from each brainstorming session is included as Appendix 3 to this report.

It is important to note that neither The Buske Group nor NDC4 officials generated the recommendations and thoughts that evolved from these brainstorming sessions. These thoughts and suggestions were independently developed by individuals from diverse areas of interest throughout the NDC4 franchise area.

Input Gathered During Focus Group Workshop Brainstorming Sessions

Question #1: What are the Key Local Issues Facing You, Your Neighbors, Community Organizations, NDC4 Local Governments, and Schools in the Next 10 Years?

The participants in the focus group sessions identified over 150 topics of concern in the seven areas listed below as key local issues. The areas are listed in the order of frequency in which related topics were mentioned. The wording in parentheses represents a sampling of focus group participants' comments and concerns in each area.

Primary Issues Identified

1. *Technology, Telecommunications and Media* (access to technology; affordability of Internet service; cable TV service is vital to people with challenges; digital divide; impact of e-commerce; net neutrality concerns; no local news coverage; social media impact; sufficient back-up storage capacity)
2. *Economic Development, Jobs, Cost of Living, Taxes, Poverty, Housing* (affordable housing; lack of jobs; deteriorating infrastructure; economic development; growth/development in Inver Grove; income-related concerns; poverty; property taxes are high; sustainable tax base)
3. *Communication Problems, Collaboration, Networking* (collaboration of city services where possible; communicating with diverse new populations; language barriers; recruiting and retaining volunteers for community groups; not enough time)
4. *Health, Public Safety and Government-Related Concerns* (access to medical services; crime-related issues and prevention; delivery of public safety services cost-effectively; fire safety; recreational resources need to be maintained and grow)
5. *Diversity, Demographics, Immigration, Age-Related Concerns* (aging population; changing demographics; geriatric monitoring of people at home; issues regarding youth; people moving into the area [immigration])
6. *Education and Arts-Related Concerns* (appreciation of and growth/support of public art; educational challenges; engaging people's artistic sides; financing education and other public services)
7. *Transportation* (expanded public transit throughout area; expanding trail system; people need transportation information)

Question #2: What Makes It Difficult for Community Organizations, City Government Departments, or Schools to Effectively Communicate Information to Their Constituencies and the Residents of NDC4 Member Cities?

An analysis of the responses to this question resulted in the identification of six areas of concern, in order of the frequency of comments related to each concern: (1) lack of time, funding, resources, communication skills, collaboration; (2) communications media and technology concerns; (3) audience-related issues, information overload, etc.; (4) PEG access-related issues; (5) language, cultural, age-related, geographic and other barriers; and (6) Comcast-related issues. Examples of the stated concerns that fall within these six areas of difficulty are provided below and on the next page.

- Challenge #1: Lack of Time, Funding, Resources, Communication Skills, Collaboration
 1. Complexity of communications media
 2. Cost of creating a program
 3. Don't know how to get message out
 4. Funding for more staff is needed
 5. How do we best communicate good things about our community, groups
 6. Limited amount of time that people can volunteer
 7. More collaboration needed (e.g., with schools)
 8. Not enough time
 9. Qualified people are needed to make sure that media tools can be used effectively
 10. TST can't cover everything that people want covered

- Challenge #2: Communications Media and Technology Concerns.
 1. Businesses need very secure connectivity
 2. Changing technological formats
 3. Difficult to make programs universally available when people want to see them
 4. Internet access is not universal
 5. Many messages are ignored
 6. People want to get messages in a large variety of ways
 7. School classrooms are being converted from TVs to computer monitors, so they need to have channels/programs streamed (rather than telecast)

- Challenge #3: Audience-Related Issues, Information Overload, etc.
 1. Apathy
 2. Competition for eyeballs
 3. Information overload from many sources
 4. Lack of community engagement
 5. Many people don't watch the TST channels
 6. "Me" orientation -- "What's in it for me" mentality

- Challenge #4: PEG Access-Related Issues
 1. Adequate funding needed to provide closed captioning for PEG programs
 2. Don't know what's on all PEG channels
 3. Equipment upgrades needed
 4. Lack of a senior channel
 5. Lack of collaboration with other PEG operations
 6. PEG program listings are not on Comcast's electronic program guide

- Challenge #5: Language, Cultural, Age-Related, Geographic and Other Barriers
 1. Generational/cultural differences re: how people get information
 2. Impact of new immigrants, non-English speaking populations
 3. Language barriers
 4. Many seniors don't have a computer
 5. School districts cross city boundaries throughout the Twin Cities area

- Challenge #6: Comcast-Related Issues
 1. Almost half of homes don't subscribe to Comcast
 2. Comcast's "Basic 1" package is not advertised or promoted by Comcast
 3. Comcast's modulators in schools are outdated
 4. Corporate philosophy changes mean that Comcast is much less interested in the community, or in keeping people as customers
 5. There's been a delay in getting Comcast to serve some business areas

Question #3: How Would You Like to Use the Cable System, PEG Access Channels, a Community Media Center, and the I-Net to Educate, Inform, and Entertain NDC4 residents?

Over 180 suggestions of program content, technology, and other applications were identified by the diverse participants in the focus group workshop sessions. They include the following:

Program Content:

- Aging-related issues (e.g., home modification, transportation, care-giving, etc.)
- Animal of the week (produced with local animal shelter)
- Basic computer instruction programs
- Bible trivia
- Break up Council meetings into shorter issue or topic categories (chapters)
- Calendar of events
- Call-in shows on a wide variety of subjects
- Call-ins before Council meetings
- Church services for shut-ins
- Citizen journalism (especially by young people)
- City Council meetings
- City government topics (e.g., how taxes are used, how budget is developed, etc.)
- Civic events
- Classic Arts Showcase
- Commercials about volunteer needs
- Community events coverage (e.g., church-affiliated youth events)
- Community-specific information
- Concerts
- Content from local filmmakers
- Cooking programs
- Coverage of competitions between residents of the 7 cities in all areas (e.g., checkers, cribbage, spelling bees, etc.)
- Coverage of outdoor events
- Cultural interpreters (and how to find them) for a variety of purposes
- Driving tips
- Educational content (e.g., teacher lectures)
- Educational programs
- Educational programs for seniors on use of new technologies, etc.
- Election programs/debates, candidates' information

Ways to Use Cable System, PEG Channels, a CMC & I-Net (continued)

Program Content (continued):

- Emergency notifications
- ESL programs
- Expanded local entertainment programming
- Graduation coverage
- History of our area
- How technology works
- How to create a program
- How to do a dance competition
- How to keep your pets healthy
- How to manage your money
- How to raise decent, respectable children
- How to start a business
- How to use a roundabout
- Importance of spaying/neutering dogs and cats
- Information about organizations who need funds
- Insight 7
- Interviews with City Council members
- Introductions of new business leaders
- Job and career information
- Job opportunities
- Journalist recap of Council meetings in addition to gavel-to-gavel coverage
- Kids programs
- Less high school sports, more performing arts from schools
- Let people know what you can do at TST
- Link-up between TST and SSP Voice and other local newspapers to deliver local news content
- Live Mayor's Youth Task Force meetings coverage
- Local high school sports
- Local music performances (and other performing arts)
- Local news and information
- Local news for the seven cities (with incentives for news tips)
- Local sports, events, concerts, choir, band, etc.
- Marketing the product
- More government meetings, including other committees and commissions
- More programming about what is going on in schools

Ways to Use Cable System, PEG Channels, a CMC & I-Net (continued)

Program Content (continued):

- More public/community meetings
- Old movies
- PEG promos on program guide channel, electronic program guide, other cable channels
- Plays, musical, artistic events
- Political forums
- Presentations by speakers at local conferences on subjects of interest to segments of the community
- Presentations by visiting dignitaries and subject experts
- Profiles of elected officials
- Profiles of local businesses and nonprofit organizations
- Programming for and about ethnic populations
- Programs about media, journalism
- Programs from other nearby communities (or from other parts of the US)
- Programs to better understand new immigrant populations
- Public safety education programs (in collaboration with public safety agencies)
- Publicity/announcements about local business-sponsored activities (e.g., shredding services)
- Record and distribute seminars with production experts (e.g., audio, acting, recording techniques, writing)
- Referendum information
- Regular updates: weather, activities, traffic
- Religious programs
- School concerts
- Short format programs about various subjects (e.g., library services, events)
- Showcase of programming from local filmmakers
- Sports events
- Spotlight on current activities
- TST to promote how it is a technology leader
- Veterans Day activities
- Video version of “The Current” demographic
- Virtual referendums (instant opinion polling)
- Ways to reduce your insurance costs
- Youth film festival

Ways to Use Cable System, PEG Channels, a CMC & I-Net (continued)

Technology-Related Applications:

- Ability to go live easily from anywhere in the franchise area
- Ability to see programs from neighboring communities
- Archive of public meetings and public records at a central location
- Audio-only podcasts
- Being able to see government meetings from all of the cities in the greater MSP area
- City-wide access to the Internet
- Connections between live cable and web interface
- Distribution of PEG programs to other media (e.g., I-Pad, smart phones, etc.)
- Evolution of TST to more than just TV (to CMC)
- Filmmaking gear -- lights, mic's, etc.
- Funding for wireless transmission of live remotes
- Having access to more than one channel in schools (due to Comcast's changes that reduced availability), via system that is compatible with school's distribution system (Smart Boards)
- I-Net to be maintained
- Industry standard ENG audio gear
- Interactive classrooms between school districts, to develop enough student demand for some classes (e.g., Chinese)
- Interactive Council meetings
- Interactivity -- ability to score/survey/rate the show you just watched
- Keep the I-Net in place
- Keep truck available for production of events, with crews that have strong ties to the community
- Link emergency alerts to detailed information provided on a cable channel
- Live streaming of TST
- Maintain the I-Net
- More dedicated educational access channels
- More focus on web streaming and radio
- Must have HD channels
- On-demand for PEG programs
- Online streaming of PEG in HD
- PEG in HD
- Portable field audio gear, digital mix devices
- Presentation of TST programs in many formats
- Programs available on phones and portable devices

Ways to Use Cable System, PEG Channels, a CMC & I-Net (continued)

Technology-Related Applications (continued):

- Public viewing areas for cable channels, provided at no charge by Comcast (they currently require subscription fees for such connections)
- Replay of live telecasts of local events
- SAP (Secondary Audio Program) capability in PEG channels
- Shorter clips available on demand and on-line
- Social media alerts regarding upcoming PEG programs
- Soft lights, portable kits
- Streaming of PEG programming/channels
- Streaming PEG to mobile technologies
- Studio with state of the art equipment (e.g., lighting, mics, audio gear, grip items, accessories)
- Technology that makes it easier to do live remotes
- Traffic camera displays and other hyper-local information on cable
- TST program listings on Comcast's electronic program guide
- TST using all technologies to deliver their PEG channels/programs
- Universal PEG access channels to everyone
- Upgrade all PEG equipment to HD, and whatever develops after that
- Video on demand for government meetings from greater Twin Cities area
- Video on demand for TST
- Video teleconferencing
- Videos made by people with their smart phones, I-Pads, personal computers and camcorders, etc.
- Wireless access points provided by Comcast at many locations throughout the area

Other:

- All access programming to be maintained
- Bring in high level "teachers"
- Channel for seniors
- Classes for high school credit
- Dance floors, art gallery, places to allow people to perform or get coverage
- DeWolfe or other music library
- Fun events like Oscars, Grammy's
- Internships for credit (or not)
- Let people volunteer for "credits" toward production gear
- Local "IMDB"

Ways to Use Cable System, PEG Channels, a CMC & I-Net (continued)

Other Applications (continued):

- Make things pop on the web site
- Match-making an intern with a business or a “client” for a project
- Matchmaking producers with content people, with supervision of the relationships
- More funding for local services available, etc.
- Offer tracks or modules
- Photos of gear online
- Promote Council meetings as not boring in many ways (including billboards)
- Promote/market PEG channels and programming
- Provide a sound stage with venue for musicians to perform
- Use creative ways to get the “creatives” attention -- outside the box

Question #4: What Would Make It Easier for You (or your Organization, City Government Department, or School) to Use PEG Access Channels, a Community Media Center or the Cable System?

Four primary categories of concern regarding improvements to make it easier to use PEG Access or the cable system were identified by the focus group participants. Those categories include, in order of the frequency of comments related to each category of concern: (1) PEG Access Staff, Assistance, Policies, Funding, Services, Training, Collaboration; (2) Cable Company's Infrastructure, System Design, Services, Policies, etc.; (3) PEG Access Programming, Distribution, Programming, Bandwidth, Channels; and (4) PEG Access Facilities and Equipment. These categories, with a sampling of the suggestions that fall within them, are listed below and on the next page.

Category #1: PEG Access Staff, Assistance, Policies, Funding, Services, Training, Collaboration.

- Balance between free speech, providing a voice, and quality standards
- Better promotion of PEG content
- Build TST training into school curriculum or offer as community education on campus
- Classes on lighting, audio, advanced training
- Evolution of TST to a CMC
- Grant program
- Incentives for kids to participate at TST
- Mentoring
- More production of/by NDC4/TST about services and opportunities
- More staff (well paid)
- Printed program guide for TST programming
- Project management -- more production assistance and advice
- Providing coordination of people with technical skills to people/groups with program ideas
- Streamlined way for new people and groups to get involved
- Training in non-technical aspects of production
- Training provided on-site (not at TST facility)
- Workshops for the community to learn about journalism

Category #2: Cable Company's Infrastructure, System Design, Services, Policies, etc.

- A la carte channel choices
- Ability to contact one person/department at Comcast that will provide accurate, reliable information about your service
- Cable plant available to all business locations
- Clear indication by Comcast of available service packages that are not publicized by Comcast (e.g., lowest cost packages)
- Cross-promotion of PEG on mass audience cable channels
- CSRs that we can understand (and hear what we are asking about)
- DVR-compatible PEG channels
- Fiber infrastructure throughout franchise area
- Free cable drops to public buildings, schools, etc.
- Include PEG listings on the interactive program guide
- More affordable rates for service from Comcast
- Redundancy (too many instances of outages without redundant design)
- Video on demand for PEG programs

Category #3: PEG Access Programming, Distribution, Programming, Bandwidth, Channels

- A senior channel
- Ability to go live from locations that are not near the I-Net
- All PEG channels/programs need to be streamed
- Content available on-demand, through a variety of apps, streaming, etc.
- Direct upload/transfer of finished programs from my computer to TST
- Indexed on-demand access to Council meetings
- Metro-wide PEG channel(s)
- Shorter segments, branding, trailers
- TST programs on the Internet, in a searchable format

Category #4: PEG Access Facilities and Equipment

- Access to equipment to permit the ability to receive multiple channels via the I-Net
- Equipment to go live from schools with an automated remote system (like Council meetings)
- HD equipment (portable, studio, and transmission)
- Incorporate I-Pad and smartphone technologies at TST
- SAP-capable equipment
- Updated council chambers equipment (school board rooms, too)

D. TELEPHONE SURVEY OF CABLE SUBSCRIBERS

During the period from April 14-24, 2014, Group W Communications conducted a telephone survey of 400 Comcast cable subscribers in the seven member cities of NDC4, drawn at random from active residential telephone numbers. In addition to questions regarding Comcast's cable signal quality, customer service, and related matters, this telephone survey asked respondents about their awareness of the Town Square Television channels, viewership of those channels, and the importance of local PEG Access programming. Following are the primary findings of the survey.

In general, the telephone survey respondents indicated that they are satisfied with several of the Comcast cable system quality and service measures tested:

- Almost 90% rated the reliability of Comcast's cable TV service and the quality of the picture and sound as "good" or "very good."
- About three-fourths rated the number & variety of channels and the helpfulness of Comcast's customer service representatives as "good" or "very good."
- About 70% rated the ability of Comcast to respond to a service call within the promised time period as "good" or "very good."
- However, only 14% said that the rates charged by Comcast for cable TV service were "good" or "very good" (38.8% rated this item as "poor" or "very poor").
- When asked how satisfied they are, overall, with the Comcast cable TV service, about three-fourths of the respondents said that they are either "very satisfied" (25.5%) or "somewhat satisfied" (47.8%).
- About 45% of all respondents said that they pay extra to receive Comcast's high definition channels. About a third (33.2%) of the HD subscribers say they "rarely" or "never" watch non-HD channels.
- Nearly half (48.3%) of all respondents said they most often use Comcast's on-screen guide to find programming information, far more than any other method.
- About 46% subscribe to Comcast's telephone and Internet service, in addition to cable TV service.
- Over half of all respondents said they think it is either "very important" (21.8%) or "important" (34%) that Comcast provide a service location in Inver Grove Heights or somewhere in the seven city Northern Dakota County service area.

The telephone survey respondents also answered a series of questions regarding the programming and services of Town Square Television:

- Nearly half (47.8%) of all cable subscribers have watched a program on a channel delivered by TST. Of these viewers:
 - * During the past month: 44.5% said they had watched Channel 14 at least once, 35.1% had watched Channel 20 at least once, 34% had watched Channels 18 or 19 at least once, 27.2% had watched Channels 15 or 16 at least once, and 10% had watched Channel 21 at least once.
 - * About three-fourths said they had watched City Council or other meetings, well over half had watched “Game of the Week,” a little under half had watched School Music/Drama Performances and “Insight 7,” and a little under 40% had watched “Girl Talk.” Three seasonal event programs tested (“Community Parks Connection,” High School or College Graduations, and Candidate Information or Election Results) had also been watched by over half.
 - * About half (50.3%) said the picture and sound quality on the TST channels is equal to the picture and sound quality of the other channels on the cable system. About one-third (34%) said it is not.
- A little under three-fourths of all telephone survey respondents said it is either “very important” (32.3%) or “important” (38.8%) to have local cable TV channels that feature programs about Northern Dakota County residents, organizations, schools, government, events and issues.
- When all cable subscribers were asked how much of their monthly cable bill should be used to support the development of local cable TV programs, **46.3%** indicated \$2.00 or more. This compares very favorably to their perceived value of four commercial channels tested. The percentages of the subscriber-respondents who indicated \$2.00 per month or more for each of those channels were as follows: ESPN: 33.5%; USA Network: 32.0%; Fox News: 27.8%; MTV: 18.3%.
- Less than one-fourth (22.3%) of all subscribers know that they or the organizations they are involved with can provide or produce programs and show them on Town Square channels. About 5% provided, helped to produce or appeared as a guest on a program shown on a Town Square Channel.

A complete analysis of the responses to the telephone survey, prepared by Group W Communications and The Buske Group, is included in a separate report to NDC4.

E. PEG ACCESS OPERATIONS, FACILITIES, AND EQUIPMENT

1. Brief Introduction to "PEG Access"

In 1984, Congress adopted the Cable Communications Policy Act of 1984, as amended (the "Cable Act"), which affirmed that local governments have the right to require cable operators to set aside "channel capacity for public, educational or governmental use." PEG Access channels, Congress explained, "provide groups and individuals who generally have not had access to the electronic media with the opportunity to become sources of information in the electronic marketplace." Therefore, it is the program producer, not the cable operator, who determines the content of a PEG access program. A request for a franchise (or renewal of an existing franchise) can be denied if a cable operator fails to provide adequate PEG Access "channel capacity, facilities or financial support." As a result, PEG access requirements have become a staple of cable franchises during the past forty years, and an important source of localism.

However, just as the cable industry has evolved from the delivery of TV services to a provider of video, voice, data services and many other ancillary services, PEG access has also evolved. Equipment, business, and management techniques that might have been appropriate forty years ago for the cable industry may not be appropriate today, and the same goes for PEG Access.

Communities have had many years of experience to determine what helps make PEG Access channels an asset for the entire community, and what inhibits their effective use. Two broad access management models have developed during this time.

Under the first model, a minimal level of equipment, facilities and services are provided, but it is up to the community to either use what is provided or not. Little effort is made to promote use, or to make it easy to use the equipment that is provided by offering training, assistance, ongoing encouragement, or sufficient hours of operation.

Under the second model, equipment, facilities and services are also provided, but a much more active role in the development of PEG Access related activities occurs. PEG Access channels are promoted to a much greater degree, staff reaches out to the community to encourage the use of the facilities and channels, a variety of training classes

are offered, equipment is updated regularly, and a user-friendly environment is provided where participants can perform the technical tasks required to create high-quality programming that adequately conveys their message.

It has been widely recognized in the PEG access field that the first model rarely works, if ever. The second model has worked very well in many small, medium and large communities throughout the U.S., from Monterey, California to the boroughs of New York City; from Salem, Oregon to Chicago; and from Olympia, Washington to Cambridge, Massachusetts. This model also requires, at a minimum, adequate initial channel space, facilities, equipment and operational support, plus ongoing and stable funding that permits expansion and replacement of equipment over time. It is under this second model that the term "Community Media Center" has evolved to acknowledge the importance of serving the public's community media needs.

When an assessment of current and future community cable-related needs and interests is conducted, it is important to examine the resources presently available for PEG Access. However, before proceeding further with this discussion, it may be useful to present the following widely accepted definitions for the terms "Access," "Public Access," "Educational Access," "Government Access," and "PEG Access":

"Access" generally means the availability of the cable system (i.e., channel capacity) for use by various agencies, institutions, organizations, groups and individuals to acquire, create, edit and distribute video programming. The cable company does not have editorial control of the content of Access programming.

"Public Access" -- Organizations, non-profit groups, or individual members of the general public, on a non-discriminatory, first-come, first-served basis, are the primary or designated programmers or users.

"Educational Access" -- Schools, colleges and universities are the primary or designated programmers or users.

"Governmental Access" -- Governmental institutions, departments, agencies or their designees are the primary or designated programmers or users.

"PEG Access" -- Public Access, Educational Access, and Governmental Access, collectively.

2. Current PEG Access Environment in the NDC4 Franchise Area

PEG Access resources are managed by the staff of NDC4 (government and educational production and programming) and Town Square Television (TST). TST is a 501(c)(3) nonprofit organization, governed by an 11-member board of directors. (NDC4 is the parent organization of TST.) TST delivers the PEG Access channels to the cable system headend, manages the public access/community production and playback facility located in Inver Grove Heights, and encourages public use of the cable system. TST's mission statement is "*to provide public access to communications technologies and services.*" Its slogan is "*Bringing together...people, programs, production.*"

TST provides training and assistance to the public in the use of the TST studio, edit suites, portable video equipment, and production truck to make locally-produced programs; creates staff-produced community programs and videos; and manages the playback of programming on seven PEG Access channels on Comcast's NDC4 cable system. The seven PEG Access channels are:

- Community Channel 14, featuring staff-produced programs that include the "Insight 7" new magazine, Game of the Week high school sports coverage, memorial celebrations, local performances, concerts, graduations, etc.
- Public Access Channel 15, an outlet for programs about a wide variety of topics that are produced or submitted by individuals and organizations from the NDC4 franchise area.
- Multifaith Access Channel 16, which offers faith-based programs that are produced or submitted by individuals and organizations from the NDC4 franchise area.
- Government Channel 18, featuring government meetings for Mendota Heights, West St. Paul, and Dakota County - plus community affairs, military, and environmental programs and "Classic Arts Showcase" videos.
- Government Channel 19, featuring government meetings for Inver Grove Heights and South St. Paul, and programming from the NASA Channel.
- Education Channel 20, which features local K-12 and college programs, school board meetings, and Deutsche Welle international news from Germany.
- Community Bulletin Board Channel 21, with listings of events and organizations, program schedule listings for all of the PEG Access channels, and locally-sourced weather and traffic information.

NDC4/TST programs have received many national and regional awards and nominations from NATOA's annual "Government Programming Awards" and the Upper Midwest Chapter of the National Academy of Television Arts and Sciences ("Emmy Awards").

To help evaluate the PEG Access activities in the NDC4 franchise area, the consultant prepared a Local Programming Operations Questionnaire and Video Facility Inventory forms that were completed by NDC4/TST staff. The completed Local Programming Operations Questionnaire is provided in Appendix 4 to this report, and the completed Video Facility Inventory forms are provided in Appendix 5.

On January 14-16, 2014, The Buske Group inspected the facilities and equipment used for the development of PEG programming by NDC4 and TST staff and members of the public.

The PEG production, editing and playback/master control facility is located at 5845 Blaine Avenue in Inver Grove Heights. The facility provides PEG functionality and interconnect services for Inver Grove Heights, Mendota Heights, South St. Paul and West St. Paul. The facility is open to the public from 1:00 to 9:00pm Monday through Thursday, 9:00am to 5:00pm on Friday, and 9:00am to 5:00pm on Saturday, for a total of 48 hours per week. Nearly all of the facility's hours of operation are dedicated to development and production of public access/community programming. Staff estimates that the facility is used about one hour per week for production service videos and City training videos.

Based upon the information included in the Local Programming Operations Questionnaire that was completed by NDC4/TST staff in July 2014, Comcast's PEG support funding totaled \$290,030 in 2011, \$302,124 in 2012, and \$305,019 in 2013, in accordance with its franchise obligations. *This PEG support funding is currently included and identified in Comcast's bills to subscribers.* Comcast's PEG support funding is supplemented by significantly higher funding amounts allocated for PEG and community television purposes by NDC4 from the franchise fees it receives (\$710,342 in 2011, \$736,370 in 2012, and \$776,485 in 2013). Other reported PEG revenue sources (about \$60,000 to \$70,000 per year in 2011-2013) include membership dues, training class fees, donations, investment income, production services, DVD sales, sponsorships, and city & school district reimbursements for services. In addition, NDC4/TST leveraged \$47,000 to \$57,000 per year in supplemental resources by engaging in-kind trade arrangements and utilizing volunteers. Taking all sources of funding into account, Comcast's PEG support funding of about \$300,000 per year represents approximately 25% of NDC4/TST total community television resources.

The seven member cities of NDC4 have also invested their franchise fees in a variety of cable- and technology-related resources, including improvements to city hall chambers, audio/video/distribution equipment, lighting, construction of control rooms, and other related expenditures.

From 2011 to 2013, an average of about 70% of total PEG expenditures was for personnel costs (including wages, benefits and payroll taxes) – a percentage that is typical for community media operations in the U.S. NDC4/TST has 13.65 full-time equivalent staff to handle management, outreach, training, facilitation, production, programming, engineering, master control, and promotional activities for public, education, government and community programming and channels.

During 2011-2013, an annual average of about 900 hours of local first-run programming (and nearly 2,000 hours of total first-run programming) were presented on the NDC4/TST channels. Many programs are repeated several times, to ensure that each channel is fully programmed 24 hours per day, seven days per week.

The TST website (townsquare.tv) offers a wide variety of useful information about the organization. It includes schedules of current, LIVE, and upcoming programming on all seven channels and the ability to set reminders to watch programs. Cable or online viewers will find video-on-demand schedules for community programs and city meetings on multiple platforms (including Comcast's Video On Demand service), promotional videos and highlight clips, and the ability to search and purchase DVD copies of available programs. Also available are schedules and online registration for training classes, information about TST's video production services and sponsorships, volunteer opportunities, hours of operation, directions to the TST facility, and a form to send an email message to TST staff. Access producers can find downloadable forms such as "Access Policies and Procedures," the cablecast request form, and the Channel 21 bulletin board message form. The website also includes links to easily make donations or pay membership dues online via PayPal or credit card, consumer information for cable subscribers, and documents relating to the cable commission.

During our inspection of the PEG facilities and review of the completed Local Programming Operations Questionnaire and Video Facility Inventory forms, The Buske Group noticed the following other items of interest:

a. Average annual usage levels of the TST equipment packages during 2011-2013 were as follows: studio -- 1,345 hours; 5 editing systems -- 4,634 hours; camcorder checkouts -- 129; production truck shoots -- 121.

b. TST reports that it offered a total of 86 training courses during 2013, covering several areas of instruction (introduction to community TV, HD production, field production, studio production, editing, and lighting). There were 112 registrations for these courses during the year. As a result, 89 new people were certified to use various TST equipment packages in 2013.

c. As indicated in the Community Media Facility Inventory forms (see Appendix 5), many items in the TST equipment inventory are more than (or nearly) 10 years old, and should be replaced/updated soon. They include the following items

- Field production -- five camcorders, six portable tripods, five lighting kits, all microphones
- Editing systems – three video recorders
- Studio – lighting instruments, cameras, switcher, video recorders, monitors, video graphics unit, audio mixer, etc.
- Multiple-camera field production system – video graphics unit, monitors, intercom system
- Field production truck – switcher, video recorders, edit controller, video graphics unit, monitors, microphones, replay system, modulator, MPEG2 encoder
- Master control/playback – video players, time base corrector, monitors

d. As also indicated in the Community Media Facility Inventory forms, and as illustrated in the photos included later in this report, many items in the equipment packages for the Council Chambers in Inver Grove Heights, Mendota Heights, South St. Paul, and West St. Paul are more than 10 years old and need to be replaced/updated, including cameras, video players, video graphics units, document cameras.

e. Upgrades are needed to much of the TST field production, truck, editing, studio, master control, and the member cities' Council Chambers equipment, based upon the observed age, condition, and limited functionality of the equipment. All local production and playback equipment should be able to record and transmit programs in both standard and high definition formats.

Photographs of the TST facility and equipment (including two of the ten camcorders, two of the five editing stations, the TV studio, production truck, and other production and playback equipment) were taken during The Buske Group's January 2014 on-site inspection, and are provided on the following pages. Photographs of the Council Chambers production facilities in Inver Grove Heights, Mendota Heights, South St. Paul, and West St. Paul were taken during that on-site inspection, and are also provided.



Photo 1: TST facility entrance and truck garage



Photo 2: TST lobby from entrance



Photo 3: TST reception area



Photo 4: TST channels monitor, awards



Photo 5: Panasonic AG-HVX250 HD camcorder



Photo 6: Panasonic AG-HPX300 HD camcorder (staff)



Photos 7/8: TST portable field production equipment and accessories storage



Photo 9: TST video editing station #1



Photo 10: TST video editing station #2



Photo 11: TST studio



Photo 12: TST studio cameras



Photo 13: TST studio control



Photo 14: TST studio control switcher, monitors



Photo 15: Studio recorders



Photo 16: Video dub rack



Photo 17: TST studio set & prop storage



Photo 18: TST production truck

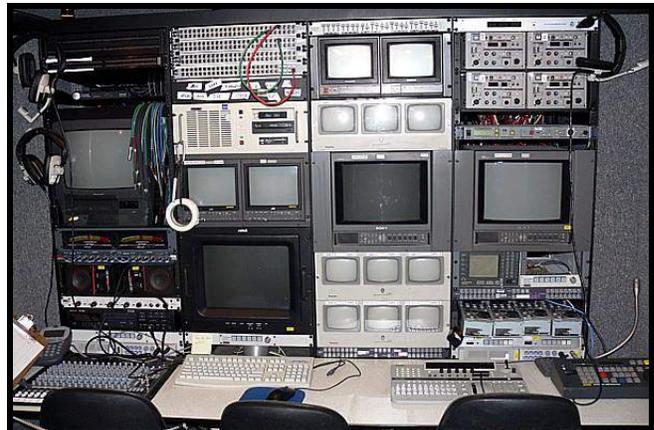


Photo 19: TST truck audio/video controls



Photo 19: TST truck replay controls



Photo 20: TST truck generator



Photo 21: TST master control



Photo 22: TST master control (operations)



Photo 23: TST master control (video playback and transmission equipment)



Photo 24: Inver Grove Hts. Council Chambers



Photo 25: Inver Grove Hts. Council Chambers desks



Photo 26: Inver Grove Hts. wall-mounted cameras



Photo 27: Inver Grove Hts. production controls



Photo 28: Mendota Heights Council Chambers



Photo 29: Mendota Heights wall-mounted camera



Photo 30: Mendota Heights production controls



Photo 31: South St. Paul Council Chambers



Photo 32: South St. Paul Council Chambers dais



Photo 33: South St. Paul ceiling-mounted camera



Photo 34: South St. Paul production controls



Photo 35: West St. Paul Chambers (podium/monitor)



Photo 36: West St. Paul (mounted camera & monitor)



Photo 37: West St. Paul wall-mounted camera



Photo 38: West St. Paul production controls

F. ADDITIONAL MEETINGS AND INTERVIEWS

In addition to the telephone survey, on-line survey, focus group workshops, and other needs assessment activities, the consultant conducted four (4) face-to-face small group meetings in January and February 2014 to explore issues with representatives of educational institutions and County Government in a more in-depth fashion. The purpose of these meetings was to gather additional input from the various public school districts serving the NDC4 member cities and from the Dakota County Government, in order to learn more about their level of satisfaction with the current I-Net/PEG facilities, equipment and services, and obtain their ideas -- drawn from their direct experience -- regarding desired improvements to these community resources.

Each group meeting included 3-10 individuals who were identified based upon input from NDC4 leaders.

The meetings with participants from educational institutions included senior level administrators such as School District Superintendents, as well as: (1) Directors of Technology; (2) School Building Principals; (3), Program Coordinators from the Elementary, Middle, and High School levels; (4) District Technology Integration Coordinators; (5) Curriculum Directors and many others. The educational meeting groups were as follows:

- South St. Paul School District Representatives
- School District 197 Representatives
- Inver Grove Heights School District 199

The school participants were asked to respond to and discuss a series of questions. The input received from them is provided below and on the following pages.

Question #1: *What do you see as the primary technology and connectivity needs of the school district in the next five (5) years?*

- The Institutional Network is a "Godsend."
- Having TST available to assist.
- Having access to the equipment within the school.
- Having a video about the school district that can be frequently cablecast on access channels and the Internet.
- Having functional internal wiring within all school buildings to enable the effective use of content that is available but currently not easily used because of the wiring and equipment issues.

Question #2: *What information/programming are you currently distributing or would you like to distribute in the future?*

- Sports activities.
- Music concerts, performances, etc.
- Truck productions.
- Elementary school events.
- Graduations.
- Electronic journalism course.
- Oral history project -- four or five years (that is huge) -- video and audio.
- Bulletin board information.
- Local school programs in multiple languages (Spanish, Arabic, etc.).
- School closings.
- Flipped classroom instructional materials and content.
- Information/programs from the schools in multiple languages.
- Having registration available on-line.
- School Board meetings.
- Special events.
- Webpage.
- Snow or other emergency information to parents and students.
- Video on demand.
- Better integration between website and PEG channels.
- Monthly program on topics related to community education and promotion and public relations about the schools.
- More student-produced content.

Question 3: *What would make it easier for the schools to do the things outlined in question 2 above?*

- Tying into the bulletin board channel.
- More effectively using and linking school website “screens” with TST so information can be distributed on PEG channels.
- The school district having an app.
- Have Comcast drop school information inserts into the Spanish channel.
- Screens in the schools have internal announcements all day. (Dist. 199)
- Not really using cable in the classroom much at all. (Dist. 199)
- Need new cable boxes: Problem with old cable boxes in some schools, signals are fuzzy. (Dist. 199)
- Several middle schools don’t have functional cable boxes. (Dist. 199)
- Schools buildings with functional internal distribution systems. (Dist. 199)
- Need new monitors in the buildings -- 1998 monitors currently. (Dist. 199)
- Use video and audio from the electronic journalism class on cable system, not just internally in school buildings.(Dist. 199)
- Internal wiring in school buildings is old and not reliable for video. (Dist. 199)
- Smart boards could be used for digital video.
- All classrooms are wired. Would like to use cable but do not because it doesn’t work. (Dist.199)
- District wide classrooms have Internet access with decent bandwidth.
- Elementary schools all have projectors on classroom computers, but it takes the teacher’s computer to show it. It isn’t as good for the teachers because they can’t pop a video on a screen and still use their computer. (Dist. 199)
- On-demand for Cable in the Classroom. This would make Cable in the Classroom much more valuable for teachers who teach the same class multiple times per day. Teachers need to be able to time it. (Dist. 199)
- Internet Essentials from Comcast to include the \$15 basic package with the \$10 Internet. (Add a Spanish channel to it.)
- Problems with Internet Essentials because there are families that could really benefit but don’t qualify because of some of the hurdles to qualify.
- On Demand capability would be huge, especially for channels such as The History Channel, NASA, Discovery, Disney and National Geographic Channel.
- Studio at High School. (Dist.199)

Question 3: *What would make it easier for the schools to do the things outlined in question 2 above? (continued)*

- Each School District Board room equipped with multi-camera system for live broadcast of school board meetings.
- Camera equipment at schools.
- A way of involving students in TST without having to move students from the school to the TST facility.
- Getting more students and parents involved with truck productions.
- Flip Classroom content available on-demand.
- Central storage of Flip Classroom content that can be accessible to multiple school districts.

On January 16, 2014, the consultant and NDC4 Executive Director Jodie Miller met with several Dakota County Government representatives, including a Deputy County Administrator, Community Relations Director from the County Attorney's Office, and representatives from the Assessor's Office, Community Services Division, and Library Administration and Support Services. During that meeting the consultant asked a series of questions. The input received from them is provided below and on the following pages.

Question #1: *What information or programming would the County like to distribute to NDC4 Cities and their residents and/or Countywide?*

- Dialog with public...not just streams of info that come out from the County departments, public health, parks, libraries, etc.
- Interactive dialog (panel or presentations), followed up by surveys or focus groups.
- Engaging constituencies in more qualitative ways, more inclusive, more interactive, more focused on specialized groups.
- County does not have centralized communications plan. It does have a communications department, but each department has its own communications staff.
- More public engagement process -- get beyond the NIMB ("not in my backyard") crowd to get a more generalized response.
- Reach a wider mainstream audience.
- Programming control -- the County's branding and imaging on a program coming from the County, not from TST.

Question #1: *What information or programming would the County like to distribute to NDC4 Cities and their residents and/or Countywide? (continued)*

- Programming from the Sheriff's Office and County Attorney.
- Demographics of county are changing -- many different cultures.
- County is mandated to provide services in meaningful way.
- County informational programs in a variety of languages in order to get vital information to all in the County, regardless of language or culture.
- Programs in ASL (American Sign Language).
- Information on Crime Victim Services and Victim rights.

Question #2: *What types of services, technologies, or resources would be helpful to the County in more effectively using Comcast or TST?*

- Viewership data -- do we have it?
- Ownership/rights issues.
- Multi-media -- move away from only using traditional cable.
- Facebook, social media.
- Getting our programming info out to the audiences so people find our schedules.
- Interactive, two-way programming.
- Interactive Program Guide -- very much a priority.
- HD for county programming.
- Video on demand.
- Support for cost and production services.
- Moving toward greater public self-service -- it's easier for people to go online and do something.
- Online videos, tutorials... our staff tries to work on it... it's not a core competency of our staff... access channel may be only one way of distributing it...
- Getting assistance and expertise on productions.
- Creating short information videos for use on cable and on-line and website.

G. SUMMARY OF MAJOR FINDINGS

The information gathered through this ascertainment process has helped to identify many significant cable-related needs and interests for the NDC4 franchise area. Concerns that are considered to be primary in nature are listed on the following pages. Definite needs and interests have been identified through the information collected through brainstorming by people who attended one of the seven focus group workshops; responses on a total of 591 questionnaires completed by persons (representing 105 organizations and institutions) who answered them on-line or at a focus group; a telephone survey of 400 Comcast subscribers; a review of existing local programming equipment, facilities and activities; and face-to-face interviews with representatives of educational institutions and County Government during four on-site meetings. It is important to note that these are current needs and interests. We believe one can reasonably assume that the communications needs of residents, institutions, and organizations in the NDC4 franchise area will evolve in the future as communications technologies advance.

General conclusions from 591 responses to a questionnaire by focus group participants or on-line survey/questionnaire respondents:

- Over half (56.8%) of the on-line survey/questionnaire respondents subscribe to the Comcast cable TV service. Of this group, 60.4% pay extra to receive HD channels, and 27.7% of these HD subscribers said that they rarely or never watch channels that are not delivered in HD.
- When Comcast subscribers were asked to indicate which one source they used most often to find information about programming on their cable TV channels, the most frequently indicated source (61%) was Comcast's on-screen program guide, which was indicated about four times as often as the next most popular source.
- When the Comcast subscriber-respondents were asked to indicate their "overall" level of satisfaction with Comcast, over two-thirds of them indicated that they were either "Very Satisfied" or "Somewhat Satisfied."
- Over 80% of Comcast subscribers answered "Very Good" or "Good" when asked to indicate their level of satisfaction with the (1) quality of the picture and sound, and (2) the reliability of the cable TV service. Services with the most "Very Poor" or "Poor" ratings were (1) rates charged by Comcast for cable TV service [50.5%], (2) ability to quickly speak to a customer service representative when you call Comcast [21.8%], (3) ease of getting problems repaired or resolved by Comcast [19.4%], and (4) ease of getting services installed or changed by Comcast [16.9%].

- About three-fourths of the Comcast subscriber-respondents said that they had tried to contact Comcast by telephone during the past year, of whom 82.4% indicated that their issue was not resolved using the Comcast automated telephone response system, without talking to a person. When these individuals were asked how long they had to wait speak to a customer service representative, 73.5% said they waited one minute or longer, or were never connected.
- Of the 58.8% of Comcast subscriber-respondents who said they had gone to the Comcast office in Inver Grove Heights or other nearby office during the past year, 87.2% said that having an office in Inver Grove Heights or somewhere in the seven-city Northern Dakota County area is “Very Important” or “Important” to them.
- Given an opportunity to provide comments about the Comcast cable TV service, negative comments outnumbered positive/neutral comments by about three to one. Common criticisms included too high fees and paying for never-watched channels.
- The respondents who do not subscribe to Comcast’s cable TV service in the NDC4 franchise area most frequently indicated that “cable TV service is too expensive,” followed by “I switched to a satellite TV service” and “I’m not interested – I don’t watch TV enough to make it worthwhile.”
- 80.5% of all respondents indicated that they were aware of the channels and programming delivered by TST. Of the “aware of TST” respondents:
 - * 45% said they watched TST Community Channel 14 at least once per month. 86-92% of those who had watched Channel 14 said they “strongly agree” or “agree” that it provides: (1) worthwhile community programming; (2) valuable information; and (3) programs that are interesting to watch.
 - * 24.2% said they watched Public Access Channel 15 and Multifaith Access Channel 16 at least once per month. 72-80% of those who had watched said they “strongly agree” or “agree” that they provide: (1) worthwhile community programming; (2) valuable information; and (3) programs that are interesting to watch.
 - * 38.4% said they watched Government Channels 18 & 19 at least once per month. 86-90% of those who had watched these channels said they “strongly agree” or “agree” that they provide: (1) worthwhile local government programming; (2) valuable information; and (3) programs that are interesting to watch.
 - * 21.6% said they watched Education Channel 20 at least once per month. 79-83% of those who had watched Channel 20 said they “strongly agree” or “agree” that it provides: (1) worthwhile educational programming; (2) valuable information; and (3) programs that are interesting to watch.
 - * 26.6% said they watched TST Channel 21 at least once per month.

- * The most frequently mentioned method that these respondents said they used to find out about the programs they want to watch on the TST channels was “channel surfing” (43.7%), followed by “www.townsquare.tv website” (35%).
 - * Disregarding the content of programs, 49.9% said the picture and sound quality of the channels delivered by TST, as compared to the other cable channels that they watch, was “about the same”; 22.6% said “lower quality.”
 - * Over one-third (37.4%) said they had watched TST programs on the townsquare.tv website (of these respondents, 29% watched them on a mobile device). About one fourth (24.1%) were not aware of the on-line option.
 - * The highest indicated TST programs these respondents said they had watched at least once per month were “City Council or other Local Government Meetings” (39.1%), “Insight 7” (25.8%), and “Game of the Week” (21.8%).
 - * When asked if they had watched four programs that appear on the channels quarterly or annually, “Parades, Coronations, & Festivals” had been seen by 60.6%, “Candidate Information or Election Results” by 58.3%, “High School or College Graduations” by 44%, and “Community Parks Connection” by 36.4%.
- When Comcast subscribers were asked to indicate the amount of their monthly cable bill that should be used to support the development of local cable programming and services in Northern Dakota County, nearly half (48%) indicated two dollars or more.
 - When Comcast subscribers were asked a similar question regarding the amount of their monthly cable bill that should be used to pay for four cable programming services (ESPN, Fox News Channel, USA Network and MTV), the percentages of those who indicated two dollars or more for each of these services were as follows:
 - * ESPN – 18.8%
 - * USA Network – 18.3%
 - * Fox News Channel – 17.1%
 - * MTV – 7.4%
 - When all of the survey/questionnaire respondents were asked to indicate how important they think it is to have cable TV channels that feature programs about local residents, organizations, schools, government, events and issues of interest to Northern Dakota County, very high percentages of them indicated that this was either “very important” (55.7%) or “important” (33.3%).
 - About half (51.7%) of all survey/questionnaire respondents indicated that it was either “Very Important” or “Important” to have local cable TV channels or content including programs in languages other than English for Northern Dakota County residents.

- Over two-thirds (67.6%) of all survey/questionnaire respondents knew that they (or the organizations they are involved with) can produce programs to show on a TST channel and on the Internet.
- 43% of all survey/questionnaire respondents said that they had previously provided or participated in the production of a program, or appeared as a guest on a TST program. Of these 230 respondents:
 - * The most common replies when asked about the “impact” of their programs was being recognized in public by viewers (34.7%). Over one-fourth of these respondents indicated that viewers and supporters said they attended an event that was promoted in their program (27.1%), or that they got requests from viewers and supporters for more information (25.8%).
 - * Over two-thirds said that the TST equipment was “always” or “usually” available when they wanted to produce a program, and 87.8% said the typical condition of the TST equipment was “excellent” or “good.”
 - * 86.7% said the quantity and technical capability of the TST equipment met their current needs (“high definition equipment” was the most often mentioned need). Nearly 90% said it was very important or important to have the ability to transmit programming live from locations throughout Northern Dakota County.
 - * When asked to rate the quality of various TST services, the most “excellent” or “good” ratings were given to production equipment training services (76.2%) and playback of programs on cable TV (71%). The service with the fewest “excellent” or “good” ratings was program promotion assistance (57.5%).
- All survey/questionnaire respondents were invited to provide comments about the programming and services offered by TST. Of the 150 respondents who replied, positive/neutral comments outnumbered negative comments by nearly 12 to 1.
- All survey/questionnaire respondents were provided a list of several media-related resources and services, and were asked if they would like to use or participate in any of them if offered in the future. About 60% or more of them answered “Yes” or “Maybe” to “free access to computers and the Internet,” “training in the use of computers and software,” “advanced media production training,” and “training in the use of your own home camera and/or editing software.”
- When all survey/questionnaire respondents were asked how interested they were in seeing certain types of programs, leading responses were “local news and information” (71.4%), “live coverage of local events (sports, concerts, etc.)” (68%), “community festivals, neighborhood events” (67.5%), “programs about local history, arts and artists” (67%), “City government/public agency meetings” (64%), “program schedules for the TST channels on Comcast’s on-screen program guide” (61.9%), “City government informational programs” (60.7%), and “local sports and recreational activities” (60.7%).

During the brainstorming portion of the focus group sessions, participants identified the following community needs, interests, and concerns:

- When asked to identify the key issues facing them, their neighbors, community organizations, local government, and schools in the next 10 years, most often mentioned were concerns relating to:
 - * Technology, Telecommunications and Media (e.g., access to technology; affordability of Internet service; cable TV service is vital to people with challenges; digital divide; impact of e-commerce; net neutrality concerns; no local news coverage; social media impact; sufficient back-up storage capacity)
 - * Economic Development, Jobs, Cost of Living, Taxes, Poverty, Housing (e.g., affordable housing; lack of jobs; deteriorating infrastructure; economic development; growth/development in Inver Grove; income-related concerns; poverty; property taxes are high; sustainable tax base)
 - * Communication Problems, Collaboration, Networking (e.g., collaboration of city services where possible; communicating with diverse new populations; recruiting and retaining volunteers for community groups; not enough time)
 - * Health, Public Safety and Government-Related Concerns (e.g., access to medical services; crime prevention; delivery of public safety services cost-effectively; fire safety; recreational resources need to be maintained and grow)
 - * Diversity, Demographics, Immigration, and Age-Related Concerns (e.g., aging population; changing demographics; geriatric monitoring of people at home; issues regarding youth; people moving into the area [immigration])
 - * Education and Arts-Related Concerns (e.g., appreciation of and growth/ support of public art; educational challenges; engaging people's artistic sides; financing education and other public services)
 - * Transportation (e.g., expanded public transit throughout area; expanding trail system; people need transportation information)
- When asked what makes it difficult for community organizations, local government departments, or schools to effectively communicate with their constituencies and the residents of the NDC4 member cities, the leading areas identified were:
 - * Lack of time, funding, resources, communication skills, collaboration
 - * Communications media and technology concerns
 - * Audience-related issues, information overload, etc.
 - * PEG Access-related issues
 - * Language, cultural, age-related, geographic and other barriers
 - * Comcast-related issues

- When asked how they could use the cable system, PEG Access channels, the community media center (TST) and the I-Net, over 180 suggestions of program content, technology, and other applications were identified. Included among them were aging-related issues; Bible trivia; calendar of events; church services for shut-ins; citizen journalism; civic events; concerts; cooking programs; driving tips; educational programs; election programs/debates; ESL programs; graduation coverage; history of our area; how to manage your money; how to start a business; job opportunities; local news and information; more public/community meetings; political forums; youth film festival; TST program listings on Comcast's electronic program guide; ability to see programs from neighboring communities; channel for seniors; distribution of PEG programs to other media; maintain the I-Net; keep truck available for production of events; upgrade all PEG equipment to HD, and whatever develops after that; on-demand for PEG programs; Secondary Audio Program (SAP) capability in PEG channels; technology to make it easier to do live remotes.

- When asked what would make it easier for their organization to use cable or PEG Access channels and a community media center, the top categories of need were:
 - * PEG Access Staff, Assistance, Policies, Funding, Services, Training, Collaboration (e.g., better promotion of PEG content; classes on lighting, audio, advanced training; coordination of people with technical skills to people/groups with program ideas, evolution of TST to a CMC; grant program; incentives for kids to participate at TST; more staff; mentoring)
 - * Cable Company's Infrastructure, System Design, Services, Policies, etc. (e.g., a la carte channel choices; clear indication by Comcast of available service packages that are not publicized by Comcast (e.g., lowest cost packages); CSRs that we can understand; free cable drops to public buildings, schools, etc.; more affordable rates for service from Comcast; VOD for PEG programs)
 - * PEG Access Programming, Distribution, Bandwidth, Channels (e.g., a senior channel; ability to go live from locations that are not near the I-Net; content available on-demand; direct upload/transfer of finished programs from my computer to TST; TST programs on the Internet, in a searchable format)
 - * PEG Access Facilities and Equipment (e.g., equipment to go live from schools with an automated remote system; HD equipment (portable, studio, and transmission); updated council chambers equipment (school board rooms, too)

Primary findings of the telephone survey of Comcast subscribers:

- In general, the telephone survey respondents indicated that they are satisfied with several of the quality and service measures tested. Almost 90% rated the quality of the picture as “good” or “very good.” Nearly 75% rated the number & variety of channels offered and the helpfulness of Comcast’s customer service representatives as “good” or “very good.” About 70% rated the ability of Comcast to respond to a service call within the promised time period as “good” or “very good.” The item that received the lowest rating was “the rates charged by Comcast for cable TV service,” which was rated as “good” or “very good” by only 14% (38.8% rated this item as "poor" or "very poor").
- Overall, about three-fourths of the respondents said that they are either “very satisfied” or “somewhat satisfied” with the Comcast cable TV service.
- About 45% of all respondents said they pay extra to receive Comcast's high definition channels. About a third (33.2%) of the HD subscribers say they “rarely” or “never” watch non-HD channels.
- Nearly half (48.3%) of all respondents said they most often use Comcast's on-screen guide to find programming information, far more than any other method.
- Nearly half (46%) subscribe to Comcast’s Internet service, in addition to cable TV.
- Over half said they think it is “very important” (21.8%) or “important” (34%) that Comcast provide a service location in Inver Grove Heights or somewhere in the seven city Northern Dakota County service area.
- About half (47.8%) of all cable subscribers have watched a program on a channel delivered by TST. Of these viewers:
 - * During the past month: 44.5% said they had watched Channel 14 at least once, 35.1% had watched Channel 20 at least once, 34% had watched Channels 18 or 19 at least once, 27.2% had watched Channels 15 or 16 at least once, and 10% had watched Channel 21 at least once.
 - * About half said the picture and sound quality on the TST channels is equal to the picture and sound quality of the other channels on the cable system. About one-third said it is not.
 - * About three-fourths said they had watched City Council or other meetings, well over half had watched “Game of the Week,” a little under half had watched School Music/Drama Performances and “Insight 7,” and a little under 40% had watched “Girl Talk.” Three seasonal event programs tested (“Community Parks Connection,” High School or College Graduations, and Candidate Information or Election Results) had also been watched by over half.

- A large majority (71.1%) of all telephone survey respondents said it is either “important” or “very important” to have local cable TV channels that feature programs about Northern Dakota County residents, organizations, schools, government, events and issues.
- When all cable subscribers were asked how much of their monthly cable bill should be used to support the development of local cable TV programs, **46.3%** indicated \$2.00 or more. This compares very favorably to their perceived value of four commercial channels: 33.5% indicated \$2.00 per month or more for ESPN; 32.0% for USA Network; 27.8% for Fox News; and 18.3% for MTV.
- Less than one-fourth (22.3%) of all subscribers know that they or the organizations they are involved with can provide or produce programs and show them on Town Square channels. About 5% provided, helped to produce or appeared as a guest on a program shown on a TST channel.

Primary findings regarding PEG Access resources, facilities, and equipment in the NDC4 franchise area:

- TST provides training and assistance to the public in the use of a studio, edit suites, portable video equipment, and production truck to make locally-produced programs; creates staff-produced community programs and videos; and manages the playback of programming on seven PEG Access channels on Comcast’s NDC4 cable system. NDC4/TST programs have received many national and regional awards and nominations from NATOA’s annual “Government Programming Awards” and the Upper Midwest Chapter of the National Academy of Television Arts and Sciences.
- The TST website offers useful information about the organization, including schedules of current and upcoming programming on all TST channels, video-on-demand schedules for community programs and city meetings on multiple platforms (including Comcast’s Video On Demand service), promotional videos, and the ability to search and purchase DVD copies of available programs. Also available are schedules and online registration for training classes, downloadable forms regarding policies and procedures, information about TST’s video production services and sponsorships, volunteer opportunities, hours of operation, and directions to the TST facility. The website also includes links to easily make donations or pay membership dues online via PayPal or credit card, consumer information for cable subscribers, and documents relating to the cable commission.

- NDC4/TST has 13.65 full-time equivalent staff to handle management, outreach, training, production, programming, engineering, master control, and promotional activities.
- Comcast provided PEG support funding that was about \$300,000 per year during 2011-2013 (in accordance with its franchise obligations). This PEG support funding (identified in Comcast's bills to subscribers) represents approximately 25% of NDC4/TST total community television resources.
- Comcast's PEG support funding is supplemented by significantly higher funding amounts allocated for PEG and community television purposes by NDC4, from: (a) the franchise fees it receives; (b) other sources of cash revenues; and (c) other sources of in-kind support.
- The NDC4 member cities have also invested their franchise fees in cable- and technology-related resources, including improvements to city hall chambers, audio/video/distribution equipment, lighting, and construction of control rooms.
- Other reported PEG revenue sources (about \$60,000 to \$70,000 in cash per year in 2011-2013) include membership dues, training class fees, donations, investment income, production services, DVD sales, sponsorships, and city & school district reimbursements for services, supplemented by \$47,000 to \$57,000 per year in in-kind services. About 70% of total PEG expenditures are for personnel, a percentage that is typical for community media centers in the U.S.
- An annual average of about 900 hours of first-run locally-produced programming (and nearly 2,000 hours of total first-run programming) were presented on the TST channels during 2011-2013.
- Average annual usage levels of the TST equipment packages during 2011-2013: studio -- 1,345 hours; 5 editing systems -- 4,634 hours; camcorder checkouts -- 129; production truck shoots -- 121.
- Many items in the TST equipment inventory are more than (or nearly) 10 years old, and should be replaced/updated soon, including several camcorders and other field production items; video editing system components; studio production cameras, lights, switcher, monitors, audio mixer and recorders; equipment in TST's production truck; and master control components. In addition, much of the production equipment in the Council Chambers in Inver Grove Heights, Mendota Heights, South St. Paul, and West St. Paul (e.g., cameras, video players, video graphics units, document cameras) are more than 10 years old and need to be replaced/updated.
- All local production and playback equipment (including all Council Chambers equipment) should be upgraded to enable the recording and transmission of programs in both standard definition ("SD") and high definition ("HD") formats.

Primary findings from four on-site meetings with representatives of educational institutions and County Government regarding the I-Net/PEG access facilities, equipment and services:

- When representatives of educational institutions were asked to identify the primary technology and connectivity needs of their school district in the next five years, their responses included:
 - * The Institutional Network is a “Godsend.”
 - * Having functional internal wiring within all school buildings to enable the effective use of content that is available but currently not easily used because of the wiring and equipment issues.
 - * Having access to the equipment within the school.

- When representatives of educational institutions were asked about the information/programming they are currently distributing or would like to distribute in the future, their responses included:
 - * Sports activities.
 - * Music concert, performances, etc.
 - * Elementary school events.
 - * Graduations.
 - * School Board meetings.
 - * School closings.
 - * Information/programs from the schools in multiple languages.
 - * Snow or other emergency information to parents and students.
 - * More student-produced content.

- When representatives of educational institutions were asked what would make it easier for the schools to do the things outlined in the previous question, their responses included:
 - * Tying into the bulletin board channel.
 - * Several middle schools don’t have a functional cable boxes. (Dist. 199)
 - * Schools buildings with functional internal distribution systems. (Dist. 199)
 - * Need new monitors in the buildings -- 1998 monitors currently. (Dist. 199)
 - * Internet Essentials from Comcast to include the \$15 basic package with the \$10 Internet. (Add a Spanish channel to it.)
 - * On Demand capability would be huge, especially for channels such as The History Channel, NASA, Discovery, Disney and National Geographic Channel.
 - * Studio at High School. (Dist.199)
 - * Each School District Board room equipped with multi-camera system for live broadcast of school board meetings.

- When Dakota County Government representatives were asked what information or programming would they like to distribute to NDC4 Cities and their residents and/or Countywide, their responses included:
 - * Dialog with public...not just streams of info that come out from the County departments, public health, parks, libraries, etc.
 - * Programming from the Sheriffs' Office and County Attorney.
 - * County informational programs in a variety of languages in order to get vital information to all in the County, regardless of language or culture.
 - * Programs in ASL (American Sign Language).
 - * Information on Crime Victim Services and Victim rights.

- When Dakota County Government representatives were asked what types of services, technologies, or resources would be helpful to the County in more effectively using Comcast or TST, their responses included:
 - * Viewership data.
 - * Multi-media -- move away from only using traditional cable.
 - * Interactive, two-way programming.
 - * Interactive Program Guide -- very much a priority.
 - * HD for county programming.
 - * Video on demand.
 - * Support for cost and production services.
 - * Getting assistance and expertise on productions.

III. RECOMMENDATIONS REGARDING COMMUNITY CABLE-RELATED NEEDS AND INTERESTS

A. INTRODUCTION

The community needs assessment process conducted by The Buske Group reveals a great deal of information regarding the current and future community cable-related needs and interests of the NDC4 franchise area. The seven community focus group sessions (attended by 120 different people); focus group questionnaire and on-line survey responses from 591 participants; the results of the telephone survey of Comcast cable subscribers; face-to-face interviews with representatives of area educational institutions and County Government; and our review of the PEG facilities, equipment and activities indicate significant needs and support for a modern cable system. Such a network can help to meet the cable-related needs and interests of area residents as they confront the challenges and opportunities of life in the 21st century.

Based upon the information and findings presented in this report, The Buske Group has identified an extensive list of community cable-related needs and interests, and developed recommendations as to how those needs and interests could be satisfied. This information should be very useful to NDC4 as it engages in the formal franchise renewal process, negotiates a new franchise with Comcast or deals with other potential new entrants. The needs and interests findings and recommendations address the following concerns: (1) Cable Plant and Headend; (2) Subscriber Services and Customer Satisfaction; and (3) PEG Access. The needs and interests findings and recommendations should apply to all companies that may operate a cable system within the NDC4 franchise area, although some may be unique to Comcast.

B. CABLE DISTRIBUTION SYSTEM

The following recommendations regarding the technical design and capabilities of the cable system to be specified in any new Franchise Agreements are based upon the information and materials gathered during the community needs assessment, and current best practices within the cable industry nationwide. Franchise Agreement requirements for cable plant, headend, and other technical matters should also draw on the findings and recommendations of the analysis conducted by NDC4's engineering consulting firm – CBG Communications, Inc.

1. Any cable system serving the NDC4 franchise area should include features typically found in state-of-the-art systems. An example of such a feature would be an Emergency Alert System (EAS) that could be activated by designated government officials to override all cable channels, to deliver up-to-date information when an emergency situation occurs. Such an EAS must be operated in compliance with FCC regulations, and must fully comply with local, state and federal EAS requirements.

If NDC4 concludes that the existing EAS cannot adequately inform residents in the franchise area about local emergencies², any cable operator within the franchise area should be required (at no cost to NDC4) to provide and install EAS equipment that designated government officials could remotely activate. The EAS must be able to override audio and video on all cable system channels within the franchise area -- without the assistance of the cable operator(s) -- for emergency broadcasts. In addition, the EAS must be able to transmit notifications specific to the NDC4 franchise area without overriding the audio and video portions of cable channels received outside of the franchise area.

2. The Franchise should include reasonable standards for upgrades during the Franchise term, as technological changes occur.

Due to the fact that changes in technology have occurred rapidly during the past decade, and are expected to continue (and likely accelerate) during the term of the next franchise, it would be appropriate to include adequate “reopener” language in the renewal franchise to address technology changes. This language might include:

- a. Authorizing NDC4 to periodically commence a review to determine whether Comcast has satisfied its obligation to respond to community needs and interests by incorporating technological advances into its system through upgrades and rebuilds.
- b. Authorizing NDC4 (after it conducts such a review) to require Comcast to submit a proposal describing its plans to incorporate technological advances into its system through upgrades and rebuilds.
- c. Authorizing NDC4 (after its analysis of Comcast’s proposal) and Comcast to negotiate in good faith to develop a plan, including a timetable, for an appropriate upgrade or rebuild of the system.

² Local emergencies that would necessitate the activation of EAS messages are incidents where such notifications would potentially save lives or reduce injuries (e.g., hazardous materials releases, a rapidly evolving public health emergency, local flash flooding, terrorist incident, etc.).

- d. Authorizing NDC4 (after negotiations with Comcast have been completed) to advise Comcast of its determination regarding the upgrade/rebuild plan, which may include an extension of the renewal franchise if the upgrade/rebuild plan submitted by Comcast is deemed by NDC4 to be adequate.

3. There is a need and interest in ensuring that the signal quality and functionality of the PEG channels is equivalent to that of the highest quality channel offered on the cable system, both now and throughout the Franchise term.

Concerns about PEG channel signal quality and functionality was indicated by several respondents to the focus group and on-line questionnaire, brainstorming participants, telephone survey respondents, and during in-person meetings with representatives of area educational institutions and County Government.

Any new franchise awarded by the NDC4 member cities should require Comcast to ensure that TST can independently monitor the PEG channels as transmitted by Comcast within the NDC4 franchise area. In addition, Comcast should be required to regularly test PEG channel signal quality on its system, and report the results to NDC4.

Other appropriate enforcement efforts regarding the technical quality and capability of the cable system may be necessary, as recommended in the report on the technical analysis of the Comcast system by CBG Communications, Inc.

Comcast should deliver all PEG channels to subscribers with no extra charges to receive them, and via channels whose quality, accessibility, functionality, and placement is equivalent to that accorded to the highest quality commercial channel carried on the cable system throughout the entire term of any renewed franchise agreements. In addition, in order to meet these needs and interests, Comcast should ensure that there are high-quality, well-maintained, and regularly monitored bi-directional fiber optic links between the TST master control/playback facility, each of the remote origination sites (located in member city, school, and community locations), and Comcast's transmission hubs and headend.

4. There is a need and interest in having the ability to easily transmit live programming from locations throughout the NDC4 franchise area (e.g., sporting event sites, parade routes, school gymnasiums, performing arts venues, etc.).

Responses to the telephone survey, focus group/on-line survey and comments during the brainstorming portion of the focus group sessions indicated a high level of interest in seeing live programming on the channels delivered by TST. When all of the focus group/on-line survey respondents were asked to indicate their level of interest in seeing certain types of local programs, one of the leading responses was “*live coverage of local events (sports, concerts, etc.).*”

Focus group/on-line survey respondents who had previously provided or participated in the production of a TST program also expressed a desire to be able to easily originate live programming from various points in the NDC4 franchise area. This goal could be accomplished if the NDC4 member cities require Comcast to either maintain and expand the live origination locations currently available via the Institutional Network (I-Net), or provide sufficient resources to enable live transmissions to occur from any location through the use of bonded cellular or other technology suitable for this purpose.

5. In addition to providing a minimum of the current allocation of bandwidth for seven (7) PEG channels and programming in the NDC4 franchise area, there is a need and interest in ensuring that Comcast provides sufficient capacity and other accommodations to enable: (a) the transmission of closed captions, stereo audio and SAP (Secondary Audio Program) content for PEG programs that are delivered with such content; (b) the delivery of PEG channels to cable subscribers in the same formats used by the highest quality broadcast and commercial/satellite cable channels carried on the system, including HD³; and (c) on-demand viewing of PEG programming, including selected PEG programs to be available in HD to cable subscribers on-demand⁴.

During the brainstorming portion of the focus groups sessions, participants said that “communicating with diverse new population” and “language barriers” were key issues facing them and significant challenges faced by community organizations, government

³ Several recent renewal franchises (e.g., Portland, Tacoma, Chicago, New York City, and Fairfax County, Virginia) -- including some in areas served by Comcast – have requirements for the phased-in delivery of PEG channels in HD.

⁴ Some of the above referenced renewal franchises also require storage space reserved on the cable company’s VOD server for PEG programs.

departments, and schools in communicating with their constituencies. When asked what makes it difficult to effectively communicate information to area residents, they mentioned the need for adequate funding to provide closed captioning for PEG programs and the impact of non-English speaking populations. ESL programs were mentioned as an example of desired PEG program content, and SAP-capable equipment was indicated as something that would make it easier to use the PEG channels.

Making accommodations to enable HD and on-demand viewing of PEG programming is supported by the interest expressed by many participants in the focus groups and meetings with representatives of area educational institutions and County Government. HD is rapidly becoming the standard viewing format in American homes, as cable companies and satellite TV service providers race to offer higher numbers of channels in HD, and equipment manufacturers discontinue the production of SD hardware. It would not be a surprise to see SD channels phased out entirely in favor of all-HD programming on cable systems during the next decade, just as analog tiers were replaced by all-digital cable systems during the past decade. PEG Access programming should not be relegated to a substandard transmission method. About a third (33.2%) of the HD subscribers in the telephone survey and over one-fourth (27.7%) of the HD subscribers in the focus group/online survey said they “rarely” or “never” watch non-HD channels.

On-demand capacity would allow PEG programming to be stored and called up when needed. While on-demand capacity is not a general substitute for PEG channels (since, for example, it is not available to all subscribers, and cannot provide live programming), it can be exceptionally useful for programming desired by users at particular times. For example, recordings of classes could be stored and called up by a student when studying for an exam. On-demand content is essential to schools that use a flipped classroom learning environment. Programs about community resources could be stored and called up on-demand; videos could be organized around topics or community issues so that a person interested in an issue could obtain a variety of information at once. Many of the desired programming areas identified by the focus group participants could take advantage of video-on-demand technology, which would assist in the delivery vital local public safety, health, and similar information available when needed by community members. Given the interest in taking advantage of the capabilities of the cable system, any new Franchise Agreement should ensure that PEG channels can take advantage of changes in technology and capabilities over the term of any renewal franchise.

6. Comcast should continue to provide the physical plant, spectrum and any necessary equipment and space at the headend, hub and node locations set aside as an Institutional Network (I-Net), as required by and described in the current franchises and associated agreements with the NDC4 member cities, to permit video, voice, and data to be originated and received at designated I-Net sites on a point-to-point and point-to-multi-point basis.

Additionally, the I-Net should be updated and expanded from its existing set of libraries, government and school locations to include additional points throughout the NDC4 franchise area, to facilitate the ability of TST to originate live programming from the community.

The importance of the I-Net was stressed as a vital communication tool by several participants during the brainstorming portion of the focus groups sessions and the meetings with representatives of area educational institutions and County Government. The I-Net also facilitates live transmission of PEG programming from remote sites in the NDC4 franchise area.

7. There is a need and interest in ensuring that Comcast includes full program listings for PEG programs on its electronic and print program guides.

Many participants in the focus groups brainstorming and respondents to the on-line survey stressed the need for complete program listings on the cable company's electronic program guides, to make it possible to plan their viewing as they do for other channels. Such capability is provided for PEG channels on many other cable systems in the United States, including several managed by Comcast (e.g., Chicago, Tucson, San Jose). Comcast's subscribers indicated in both the on-line and telephone surveys that the on-screen program guide was the most frequently indicated source of programming information. Given the high level of importance placed on local information by respondents to the telephone and on-line surveys, and the fact that subscribers indicated that they use the Comcast on-screen program guide as their primary way of identifying programming to view, it is essential that all PEG programming be included (both by title and description) on the Comcast on-screen interactive programming guide.

C. SUBSCRIBER SERVICES AND CUSTOMER SATISFACTION

The participants in various elements of the community needs assessment process were asked questions about their level of satisfaction with the current cable TV service, and the types of new services that were of interest to them. Based on their responses, the following recommendations are offered:

1. There is a need and interest to require Comcast to significantly improve its customer service, and to meet or exceed the FCC's customer service obligations.

Comcast should be required to meet updated customer service standards, which should be included in the Franchise Agreement. Furthermore, Comcast should provide information and reports on a quarterly basis to prove that it is in compliance with the updated customer service standards, and should take immediate steps to bring itself into compliance if it is not. The Franchise Agreement should include penalties and/or liquidated damages if Comcast does not meet the updated customer service standards. Based upon responses to the focus group/on-line survey and participants' comments during the brainstorming portion of the focus groups about problems with Comcast's customer service, special attention should be given to:

- a. the ability for current and potential customers to promptly connect to a Comcast customer service representative by telephone;
- b. Comcast's delivery of clear and accurate information about and promotion of services that are available from the company;
- c. providing subscribers or potential subscribers with accurate, written confirmation of customer orders;
- d. the ease of getting problems repaired or resolved by Comcast;
- e. the ease of getting services installed or changed by Comcast; and
- f. requiring Comcast to provide accurate, easy to understand bills to its customers, that reflect what they were told the cost would be.

In their comments in response to the focus group/on-line survey, many subscribers made it clear that they are displeased with the manner in which Comcast customer service representatives respond to telephone inquiries. About three-fourths (74.9%) of the Comcast subscriber-respondents to the survey said that they had tried to contact Comcast by telephone during the past year. Of these respondents, 82.4% indicated that their issue was not resolved using the Comcast automated telephone response system, without talking to a person. When these individuals were asked how long would they estimate that they waited to speak to a customer service representative, *73.5% indicated that they had to wait*

one minute or longer, or were never connected. Furthermore, over one-third (34.4%) of those who were connected to a customer service representative by telephone indicated that *the CSR was unable to resolve their issue.*

With respect to telephone answering concerns, the FCC's customer service standards state as follows: *"Under normal operating conditions, telephone answer time by a customer representative, including wait time, shall not exceed thirty (30) seconds when the connection is made. If the call needs to be transferred, transfer time shall not exceed thirty (30) seconds. These standards shall be met no less than ninety (90) percent of the time under normal operating conditions, measured on a quarterly basis."*

2. There is a need and interest to require Comcast to have an office in Inver Grove Heights or a location within the seven-city Northern Dakota County area. Of the Comcast subscriber-respondents to the focus group/online survey who had gone to a Comcast office during the past year, 87.2% said that an office in Inver Grove Heights or within the seven-city Northern Dakota County area is "Very Important" or "Important" to them.

3. There is a need and interest in keeping the "Basic 1" tier of cable TV service and ensuring that Comcast effectively promotes the availability of this low-cost option. This specific concern was mentioned during the brainstorming portion of focus groups. In addition, Comcast subscriber-respondents to the focus group/online and telephone surveys gave their lowest rating to "the rates charged by Comcast for cable TV service."

4. Adequate PEG bandwidth should be made available on the subscriber network (with such channels grouped together on the lowest cost tier of services). Additional bandwidth/capacity should be available to enable on-demand and HD capability for PEG programming, and for future PEG purposes. PEG HD channels should also be grouped together within the HD channel lineup. All PEG bandwidth/capacity should be provided free of charge. (See Section D.2., below, for more specific recommendations regarding PEG Access bandwidth/capacity.)

Having local cable channels featuring programs about NDC4 franchise area residents, organizations, schools, government, events and issues was ranked as either "Very Important" or "Important" by very high percentages of the focus group/online and telephone survey respondents. Many focus group participants expressed an interest in having PEG Access channels with HD and on-demand capability.

In addition, it is important to note again that about a third (33.2%) of the HD subscribers in the telephone survey and over one-fourth (27.7%) of the HD subscribers in the focus group/online survey said that they "rarely" or "never" watch non-HD channels.

D. PEG ACCESS

1. Overview

The findings of this ascertainment process indicate a very high level of support for the inclusion of significant PEG bandwidth/capacity and resources and an appreciation of the importance of PEG services. As stated previously in this report, very high percentages of the Comcast subscribers that responded to the focus group questionnaire, on-line survey, and telephone survey said it is “Important” or “Very Important” to have local cable TV channels that feature programs about NDC4 franchise area residents, organizations, schools, government, events and issues.

PEG channels are unique in their ability to deliver regularly-scheduled local programming, guided by professional staff that offer outreach, training, production assistance, playback, and promotional services. Local broadcast stations stopped providing such a range of local programming years ago, and are now content to rely primarily on non-local network and syndicated programs. While videos distributed on the Internet (via YouTube and other sites) offer another alternative to broadcast and satellite-delivered stations, audience measurement companies report that the number of people who watch programs online are currently very small, in comparison to those who watch on cable TV. In addition, YouTube and the other online outlets do not provide the outreach, training, production assistance, and promotional services available at TST and other community media centers throughout the United States, to help community producers create video programming with good production values that do not detract from the effort to get their messages out to the public.

Significant percentages of the Comcast subscriber-respondents to the focus group/on-line survey and telephone survey said they were aware of and had watched the channels delivered by TST. Strong majorities of those who had watched these channels said they “strongly agree” or “agree” that they provide: (1) worthwhile programming; (2) valuable information; and (3) programs that are interesting to watch.

During the “brainstorming” segment of the focus group workshops, participants mentioned over 180 suggestions of program content, technology, and other applications. When asked what would make it easier to use the cable system or PEG channels and a community media center to communicate, their primary categories of need were:

a. PEG Access Staff, Assistance, Policies, Funding, Services, Training, Collaboration (e.g., better promotion of PEG content; classes on lighting, audio, advanced training; coordination of people with technical skills to people/groups with program ideas evolution of TST to a CMC; grant program; incentives for kids to participate at TST; more staff; mentoring);

b. Cable Company's Infrastructure, System Design, Services, Policies, etc. (e.g., a la carte channel choices; clear indication by Comcast of available service packages that are not publicized by Comcast (e.g., lowest cost packages); CSRs that we can understand; free cable drops to public buildings, schools, etc.; more affordable rates for service from Comcast; VOD for PEG programs);

c. PEG Access Programming, Distribution, Bandwidth, Channels (e.g., a senior channel; ability to go live from locations that are not near the I-Net; content available on-demand; direct upload/transfer of finished programs from my computer to TST; TST programs on the Internet, in a searchable format); and

d. PEG Access Facilities and Equipment (e.g., equipment to go live from schools with an automated remote system; HD equipment [portable, studio, and transmission]; updated council chambers equipment [school board rooms, too]).

TST is a non-profit organization established to oversee PEG activities in the NDC4 franchise area. PEG support funding from Comcast -- in accordance with its franchise obligations (and identified in Comcast's bills to subscribers) -- is supplemented by significantly higher funding amounts allocated for PEG and community television purposes by NDC4, from the franchise fees it receives. About 65-70% of total PEG expenditures are for personnel, which is typical for community media centers in the U.S.

NDC4/TST programs have received many national and regional awards. An annual average of about 900 hours of first-run locally-produced programming (and nearly 2,000 hours of total first-run programming) were presented on the NDC4/TST channels during 2011-2013.

Average annual usage of the PEG equipment packages during 2011-2013 included 1,345 hours of studio productions, 4,634 hours of editing systems usage, 129 camcorder checkouts, and 121 truck productions.

Many items in the TST equipment inventory are over 10 years old, and need to be replaced soon. Equipment packages that are of particular concern include several camcorders and other field production items; video editing system components; studio production cameras, lights, switcher, monitors, audio mixer and recorders; equipment in the production truck; and master control components. Much of the production equipment in the Council Chambers in Inver Grove Heights, Mendota Heights, South St. Paul, and West St. Paul (e.g., cameras, video players, video graphics units, document cameras) are also more than 10 years old and need to be replaced/updated. More details about these findings – and recommendations to address these needs -- are provided later in this report.

All local production and playback equipment (including all Council Chambers equipment) should be upgraded to enable the recording and transmission of programs in both standard definition (“SD”) and high definition (“HD”) formats.

Based upon these findings, we have considered PEG needs and interests for NDC4 franchise area in light of:

- the current amount of local programming activity;
- the reliance on outdated equipment items;
- the significant level of interest and community participation in PEG activities;
- the size and unique nature of NDC4 franchise area; and
- the cost of providing PEG services, facilities and equipment.

Consequently, there is a need and interest in ensuring that any future Franchise Agreement includes provisions that:

a. require Comcast to allocate sufficient bandwidth/capacity for PEG, including conversion of the PEG channels delivered by NDC4/TST to HD; and

b. require Comcast to provide adequate funding and in-kind resources and support for PEG activities that would: (1) maintain and expand existing PEG services and resources; and (2) enable TST to meet the needs and interests expressed by NDC4 franchise area residents and representatives of local organizations through the focus group sessions and questionnaires, telephone and on-line surveys, and face-to-face interviews with representatives of interest groups, institutions, and organizations. Such services and resources must be available to: (1) all residents, government agencies, institutions and organizations within the NDC4 franchise area; and (2) households that subscribe to any cable or other multi-channel programming service provider in the NDC4 franchise area.

2. PEG Bandwidth/Capacity

A wealth of information relating to public, educational, and government programming on channels set aside for PEG purposes was gathered during the needs assessment activities that were conducted by The Buske Group. Several concerns related to the PEG channels were mentioned, including:

- the need for the PEG channels to be equivalent to highest quality channels on cable system;
- the need for the PEG channels to be available in high definition (HD) on Comcast's channel lineup;
- the availability of the on-demand option for PEG programs (e.g., sports, classroom instruction, etc.);
- the need to include program schedule information for the PEG channels on Comcast's interactive programming guide (which is the most frequently used source for information about programming on cable TV channels -- indicated nearly four times as often as the next most popular source);
- the need for Comcast to help promote the PEG channels, including cross-promotion of them on commercial channels; and
- the need for more awareness and better promotion of the PEG programming and services, including availability of program schedule information in several ways

The following recommendations are based upon the information gathered, as well as widely recognized best practices in the community media field:

a. Initially, there is a need and interest in ensuring that Comcast maintains the current allocation of bandwidth to deliver the seven (7) PEG channels that are now provided to Comcast cable subscribers in the NDC4 franchise area. As discussed previously in this report, we anticipate that the SD format will be gradually phased out in the near future, as the penetration of HD televisions in U.S. households continues its very rapid growth. During this transition period, as the PEG channels are converted to HD format (either gradually or all at once), they should be transmitted in both SD and HD formats – as is the case for local broadcast and satellite-delivered channels – for the convenience of all cable TV subscribers, including those who do not subscribe to the HD package of programming services. The simultaneous transmission of the PEG channels in SD and HD formats should continue as long as there are SD channels in the lowest cost tier of service.

b. Based on the high level of importance indicated for local programming by respondents to the focus group/on-line and telephone surveys, there is a need and interest in ensuring that Comcast has additional bandwidth/capacity available for future PEG purposes, to be activated in accordance with a pre-determined programming-based formula, when programming amounts put a strain on the existing PEG bandwidth/capacity. Below is a recommended PEG channel activation formula:

An additional PEG channel may be requested when the level of programming on one of the existing PEG channels meets or exceeds the following conditions

i. During sixteen (16) consecutive weeks, an existing channel designated for the same purpose as the channel requested (public or educational or governmental access) cablecasts at least forty (40) hours per week of "qualified" programming.

ii. "Qualified programming" includes any locally produced material carried on the PEG channels, except for "bulletin board" material where the same text (or video and text) screen is sent simultaneously to all Subscribers. "Locally produced" programming is defined as:

(1). Programming produced within the NDC4 franchise area; or

(2). Programming produced or provided by any resident of the NDC4 franchise area (or any local public or private agency which provides services to residents located within the NDC4 franchise area), regardless of where the programming is physically produced.

c. There is a need and interest in ensuring that all PEG channels are located on the lowest cost tier of service and in a consecutive or near consecutive group of channels throughout the term of the new Franchise. As long as there are SD channels in the lowest cost tier of service, PEG SD channels should be grouped together within that tier. In addition, PEG HD channels should be grouped together within the lowest cost HD tier. The inclusion of PEG channels in the lowest cost tier of service and the grouping of similar types of channels are standard practices in the cable industry, in keeping with the spirit of the Cable Act's expressed support for PEG Access and for the convenience of subscribers.

d. There is a need and interest in maintaining the low-cost "Basic 1" tier of service on the cable system (to continue to include all of the PEG channels), and for Comcast to more effectively promote the availability of this option.

e. There is a need and interest in ensuring that each PEG Access programming service is given the same channel location on the system of any cable operator serving the NDC4 franchise area.

This recommendation is based on the fact that in communities served by more than one cable service provider, the competitors often assign PEG Access channels to different numerical locations, thereby causing confusion in the public regarding how to find these channels and serious problems regarding the promotion of PEG Access programming.

f. There is a need and interest in ensuring that PEG channel locations (both SD and/or HD) may only be changed if Comcast must do so due to comply with FCC requirements or for documented technical reasons, and with the approval of NDC4. All costs related to channel relocations must be paid by Comcast, including but not limited to: (1) NDC4/TST staff time; (2) equipment; (3) creation of electronic and print versions of station ID's and logos; (4) replacement of materials such as letterhead, business cards, etc.; and (5) any other items which include the channel number. In addition, Comcast should provide free print and electronic advertising and announcements to inform subscribers about the relocations.

Participants in the focus group and the consultant's in-person meetings with representatives of area educational institutions and County Government indicated several concerns about issues related to the PEG channels: they don't know what's on the PEG channels; PEG program listings are not on Comcast's electronic program guide; the need for better promotion of PEG content; lack of a senior channel, etc. Promotional activities would be enhanced if PEG channel locations are stable over time, and are shifted only if absolutely necessary, as described above. If and when a PEG channel location must be changed, subscribers must obtain information in advance about the changes through a variety of methods, as outlined above. In addition, the inclusion of PEG channel programming information on Comcast's interactive electronic programming guide (as Comcast already does in many other communities that it serves) is a major need, especially since the Comcast's on-screen program guide was the most frequently identified source of programming information indicated by on-line and telephone survey respondents -- about four times as often as the next most popular source.

g. There is a need and interest in ensuring that PEG channels have the same functionality and capacity as the highest quality broadcast and commercial/satellite channels delivered by Comcast on its cable system. This would include, but not necessarily be limited to, the ability to transmit signals in any format, to transmit video and audio signals only, or to transmit other information (including secondary audio, text, digital information,

HD signals, or other audio signals). Comcast should also be required to maintain the same technical standards for the transmission of the PEG channels (in either SD or HD format) as it must for local broadcast and satellite-delivered channels on its cable system.

h. Comcast should also provide sufficient storage space, encoding, and other accommodations to enable free on demand viewing of PEG programs, as selected by the PEG channel managers.

As stated previously in this report, HD and on-demand viewing of PEG programming is supported by the interest expressed by focus group participants, and by the nature of the information that could be distributed via the PEG channels. As discussed previously, HD is rapidly becoming the standard viewing format in American homes. On-demand capacity for PEG programming is supported by the interest expressed by focus group participants, and by the content that participants desired to distribute via TST.

Comcast currently provides free VOD capacity for selected PEG programs on several of its cable systems in the United States (e.g., Philadelphia; Houston; Sacramento; Medford, Massachusetts; and Peterborough, New Hampshire)⁵. While on-demand capacity is not a general substitute for PEG channels, it can deliver programs desired at a particular time. Examples of VOD applications for PEG operations include: (1) after close of business, a local merchant could call up a VOD copy of that day's City Council meeting to review the discussion and decision regarding an issue that would directly affect her business; (2) a live telecast of a local sporting event could be called up at any time later for review and analysis by participating team members and their coaches; and (3) a student could watch a recorded lecture that had been shown on an educational access channel during the school year by calling it up on-demand, to review it on the night before a test.

A significant portion of the programming identified by the focus groups could take advantage of video-on-demand technology, and it could assist in addressing identified communications problems (e.g., it is difficult to make programs universally available when people want to see them, people don't know what's on the PEG channels, etc.).

Given the interest in using the capabilities of the cable system, language in any renewed Franchise should ensure that PEG channels can take advantage of changes in technology and capabilities over the term of the Franchise. Items like HD and on-demand capacity for PEG programming are matters of interest today, but the language in any renewed franchise should be sufficiently flexible and forward-thinking to accommodate PEG use of new

⁵ See Comcast's report on PEG Access VOD activities in some of these communities at: <http://corporate.comcast.com/images/PEG-Report-2013-01-28.pdf>

technologies that might become standard applications for cable channels in the near future (e.g., 3D TV, 4K TV).

i. There is a need and interest in ensuring that Comcast continues to provide all PEG bandwidth/capacity (including SD and HD channels for PEG) free of charge to NDC4, TST, the member cities, the public school districts and PEG community producers.

This recommendation is based on the fact that the provision of PEG channels free of charge has been the norm in the cable industry for over 40 years, including all of the time that cable service has been provided in NDC4 franchise area. NDC4, TST, the member cities, the public schools and PEG community producers have limited resources, and their services would be adversely affected if they had to pay for allocated bandwidth/capacity. Furthermore, cable operators do not charge other program providers to be included on their channel line-ups, and are known to pay \$5.00 or more per subscriber per month to carry a single non-premium programming service (i.e., ESPN).

3. PEG Facilities and Equipment

The following recommendations are based upon the current condition and shortcomings of the TST and member cities' equipment packages; information gathered during focus group sessions and meetings with representatives of area educational institutions and County Government; the consultant's inspection of the PEG facilities and equipment in the NDC4 franchise area; and the consultant's experience and knowledge of PEG facilities, equipment, services, operations, and management in numerous other communities.

a. Based upon the consultant's on-site inspection of the TST and member cities' facilities and equipment, review of the Video Facility Inventory forms (Appendix 5), and concerns expressed by many focus group participants and respondents to the on-line survey, there is a need and interest in ensuring that Comcast, upon signing any new Franchise Agreement, should provide grant funding to help replace and upgrade the existing TST and member cities' equipment packages. In addition, the new Franchise Agreement should include a provision that requires Comcast to provide periodic replacement capital equipment grants. These grants should be in addition to the amounts paid by Comcast to NDC4 as franchise fees, which will continue to be a vital source of supplemental funding for PEG facilities and equipment.

Fully updated equipment packages for TST and the member cities are needed. Many items in the TST and member cities' equipment inventories are over 10 years old and need to be replaced (including several camcorders and other field production items;

video editing system components; studio production cameras, lights, switcher, monitors, audio mixer and recorders; equipment in TST's production truck; and master control components; and much of the production equipment in the Council Chambers of the seven member cities, including cameras, video players, video graphics units, etc). The inventory needs to be upgraded to enable recording and transmission of programs in SD and HD.

The initial and ongoing replacement capital equipment grants would be used to replace/upgrade: (1) During years 1-2 of the new franchise term: the TST studio, production truck, multiple-camera field production system, field production kits for community producers, staff field production kits, editing systems, the master control/playback system, an archiving system, a training-presentation system, each of the four Council Chambers production equipment packages (plus a new Council Chambers package in the Lilydale City Hall), and connectivity equipment linking the TST facility to the City Hall facilities and other locations; (2) Every 2-3 years thereafter: two of the field production kits for community producers; (3) In years 5-6: the staff field production kits and the multiple-camera field production, archiving, and training-presentation systems; (4) In years 5-6 and 7-8: several production truck equipment items; (5) In years 5-6, 7-8 and 9-10: two editing systems; (6) In years 7-8: the TST studio and the master control/playback system; and (7) During intervening years: various items within each equipment package, as failures occur.

The above general recommendations are made on the basis of the following observations of the PEG equipment inventory:

i. Studio. The current production studio inventory contains equipment that is as much as 12 to 15 years old, reaching the point where support is unavailable. The consultant's suggested package of replacement/upgrade equipment -- provided in Appendix 6 to this report -- provides entry level broadcast camera systems that will support the current users in the transition to HD. The control room infrastructure proposed will provide similar operational workflow for staff and users while providing the speed and reliability of tapeless recording. Upgrades for aging audio and lighting equipment are also included.

ii. City Council Chambers. The Council Chambers in Inver Grove Heights, Mendota Heights, South St. Paul, and West St. Paul utilize production equipment that is mostly 10 years old or more, at end of life, obsolete and unsupported. Lilydale has a fairly new City Hall that is now ready to be equipped, too. The consultant's suggested package of initial and replacement/upgrade equipment for these five Council Chambers supports a very cost-effective production environment with remote operation capability and reduced costs for staffing and maintenance requirements. While no specific equipment recommendations are being made at this time, our discussions with NDC4/TST staff revealed that they have experienced training and support benefits by standardizing the packages across each location, a practice that should continue in the future.

iii. Camcorder Packages. TST currently has ten kits with a mix of tape and solid state recording camcorder systems ranging in age from 4 to 12 years of age. The consultant's suggested package of replacement/upgrade equipment anticipates a rolling replacement of systems throughout the franchise period to spread the cost over time. While this creates a bit of a support and training issue, NDC4/TST recognizes the need to maximize the life expectancy of existing equipment. Significant reductions in maintenance and support costs should occur as the transition from tape to tapeless/solid state recording is realized.

iv. Production Truck. The TST production truck is based on a 2002 commercial Wolf Coach chassis, with equipment ranging from 7 to 12 years of age. Given the age of the chassis, accelerated oxidization due the usage in cold weather (road salt) and significant design changes due to equipment updates, the consultant's suggested package of replacement/upgrade equipment provides for construction of a new vehicle in Year 1 of the new franchise term. As was the case for the suggested studio equipment package, entry level broadcast camera systems are recommended to support current users in the transition to HD, and the suggested control infrastructure will provide similar operational workflow for staff and users while providing the speed and reliability of tapeless recording.

v. Portable Multiple-Camera Field Production Package. In addition to the production truck, TST also has a portable, multiple-camera field production package for smaller community events. Currently, cameras for this production package are shared with the field production kits, and cross-usage can create a significant bottleneck when community producers are forced to compete for equipment with other community events. The substantial reduction in cost of field cameras creates the opportunity to dedicate camera systems to this production package, allowing for more content generation by the community. The camera systems should be interchangeable from a training and support standpoint, which also increases the total number of cameras available to staff and users. The latest generation of equipment provides for a significant increase in quality and reliability while supporting HD media, and also dramatically reduces the size and weight of the gear.

vi. Video Editing Systems. TST currently supports Final Cut Pro 7 editing software on the Apple Mac platform for post-production. The consultant's suggested package of replacement/upgrade equipment assumes that will continue with upgrades to FCP X on the newer iMac and PowerBook systems. If NDC4/TST decides to deploy the newer Mac Pro systems, additional capital would be required above the amount in the consultant's suggested package. One option discussed was the possibility of making a change to another hardware/software edit platform for post-production. NDC4/TST staff will need to carefully evaluate: (1) capital costs of hardware and software; (2) ongoing operational costs; and (3) training and workflow issues for staff, users, and organizational stakeholders.

vii. Playback Equipment. The current playback system provides SD-SDI channel origination for seven channels with redundancy. The consultant's suggested package of replacement/upgrade equipment provides for upgrades to HD channel playback capacity with requisite storage, distribution and monitoring upgrades.

viii. Archiving Equipment. The upgrade to HD throughout the acquisition and post-production environment necessitates a significant increase in data storage and archive capacity. The consultant's suggested package of replacement/upgrade equipment provides for an entry-level LTO archive library system. There are a number of management options for storage and archival solutions, and NDC4/TST staff will need to do significant research to determine what the best solution for their needs will be as they migrate to an HD workflow throughout their environment.

ix. Connectivity/Distribution Equipment. NDC4/TST has a number of interconnect links that facilitate their operations. The upstream links delivering the municipal meeting feeds were recently replaced and are HD capable. The consultant's suggested package of replacement/upgrade equipment provides for HD capable IP encoder/decoder pairs for live content contribution over the IP iNet, as well as pairs for inter-municipal content contribution from other cities. The suggested package also provides for a managed Ethernet switches and media conversion to facilitate the utilization of these encoder/decoder pairs for IP content distribution from remote sites.

b. TST and the member cities must make a transition to a fully digital equipment environment, including camcorders, editing and studio equipment, Council Chambers equipment, and master control servers and distribution technology, interconnected to move content from production/post-production locations to master control and on to the appropriate PEG channel and the Internet. PEG equipment should be able to record and transmit programs in stereo, in both SD or HD formats, and be transmitted in these formats by Comcast to cable subscribers.

The Buske Group has prepared a detailed, suggested set of equipment packages -- provided in Appendix 6 to this report -- that would be appropriate to meet the needs described above, taking into consideration the information provided by NDC4/TST staff in the equipment inventories (as shown in Appendix 5). Please note that due to the fact that media equipment is evolving very rapidly, the items identified in Appendix 6 are examples of what could currently satisfy the identified equipment needs, and are not intended to be specific recommendations of items to be purchased.

c. In addition to grant funding to replace and upgrade the PEG equipment described above and detailed in Appendix 6, funding will also be needed for several facility-related costs. NDC4/TST staff reported building capital needs that include replacement/upgrade of the HVAC system, office computers/network/server, generator, flooring, building roof, building signage and lighting, and parking lot re-paving.

4. PEG Services

An analysis of the information gathered reveals a need and interest in continuing, enhancing and expanding PEG services in the NDC4 franchise area.

As frequently noted in this report, the ascertainment of community cable-related needs and interests discovered extensive evidence that NDC4 franchise area residents support and have a very positive attitude about the PEG channels and services that are currently delivered to them. Very high percentages of the Comcast subscribers who responded to the focus group questionnaire, telephone survey and on-line survey said it is “Important” or “Very Important” to have local cable TV channels that feature programs about local residents, organizations, schools, government, events and issues.

Furthermore, focus group brainstorming participants and representatives of educational institutions and County Government mentioned a number of other desired services, including a long list of PEG program topics; advanced training classes; information/programs from the schools and County informational programs in a variety of languages; more student-produced content; PEG program information on Comcast’s program guide; PEG programming available in HD and by video-on-demand; the ability to direct upload/transfer finished programs from a home computer to TST; viewership data; the ability to go live from locations that are not near the I-Net; a senior channel; and more and better promotion of PEG content.

If NDC4/TST is to meet the needs and interests identified by the public during the needs assessment process, the current levels of capital and operations funding and in-kind support must be maintained and enhanced during the term of the next Franchise Agreement. The quantity and quality of PEG services in the future will be dictated to a large degree by the level of PEG grant funding provided by Comcast, supplemented by allocations from the franchise fees received from Comcast by NDC4’s member cities. NDC4/TST will also need to expand their efforts to obtain funding and in-kind support from a variety of other sources.

The participants of the focus groups and respondents to the telephone and on-line survey indicated their appreciation and respect for the award-winning PEG programming and services that are currently provided by NDC4/TST. However, they also provided hundreds of suggestions and requests for a variety of other PEG programs and services that they would like to see offered in the future, including but not limited to:

- Sports activities
- Concerts, performances, etc.
- Graduation coverage
- Snow or other emergency information
- Programs from the Sheriff's Office and County Attorney
- Programs in ASL (American Sign Language)
- Church services for shut-ins
- Citizen journalism
- Election programs/debates
- Local news and information
- HD for PEG channels
- SAP (Secondary Audio Program) capability in PEG channels
- PEG video on demand
- Technology to make it easier to do live remotes
- Promotion of PEG programs

To help meet the expressed community cable-related needs and interests described throughout this report, any new Franchise Agreement adopted by the NDC4's member cities should include provisions to ensure that initial and ongoing PEG support grants are provided by Comcast, to supplement any allocations by NDC4 from franchise fees to support PEG activities.

These revenue sources would be critical elements of the PEG funding package. PEG resources and services could not continue without such core funding, and the desired expansion of these resources and services would not be possible. With additional funding, NDC4/TST, the member cities and the schools would be able to develop these and many other suggested programs and services.

To help address a need and interest to more effectively promote the PEG programming and services to area residents and cable subscribers in the NDC4 franchise area, the renewal Franchise Agreement adopted by the NDC4's member cities should include provisions to ensure that Comcast provides the following:

a. Courtesy promotion of the channels delivered by TST -- including full program listings for PEG programs -- in all print and electronic program guides for their subscribers.

As noted in this report, Comcast does not provide information about the programming shown on any of the channels delivered by TST on its on-screen program guide, which was the most frequently indicated source of cable programming information by the focus group/on-line and telephone survey respondents.

In addition, as new technologies enable the implementation of other methods of providing program schedules and information to subscribers (e.g., navigation and program searching with a remote through voice commands), such technologies must deal with PEG programs in the same manner as programs shown on the broadcast and commercial/satellite cable channels.

b. Free insertion of promotional spots for the NDC4/TST channels, programs and services on the cable satellite channels that make times available for local advertising insertions.