

REQUEST FOR PURCHASE IN EXCESS OF \$20,000/CHANGE ORDER



To: Mayor and City Council

From: Ann Kattreh
Parks & Recreation Director

Date: August 4, 2014

Subject: Request for Purchase – Community Attitude and Interest Citizen Survey, ETC Institute

Agenda Item #: IV.E.

The Recommended Bid is

Within Budget

Not Within Budget

Date Bid Opened or Quote Received:
Wednesday, July 30, 2014

Bid or Expiration Date:
NA

Company:
ETC Institute

Amount of Quote or Bid:
\$23,650 plus expenses for two site visits

Recommended Quote or Bid:
ETC Institute

General Information:

The Park Board is in the process of completing a master plan for the park system and would like to include an updated Community Attitude and Interest Citizen Survey as part of the master planning process. Staff recommends hiring the ETC Institute as they successfully completed a similar study for the Parks & Recreation Department in 2006. In addition to the type of survey that was completed in 2006, this process will also include a Unmet Needs Analysis and will provide geocoding of surveys. The goal will be to receive 600 completed surveys, which will provide a 95% level of confidence with +/- 4% margin of error. The survey will be six pages long and will be mailed to a sample of homes. Ron Vine, ETC Institute Vice President will also make a presentation of findings at the completion of the project.

The timeline for this project is as follows:

August 11, 2014	Ron Vine site visit, including Park Board work sessions
August 2014	Survey content preparation
September 2014	Data collection
October 2, 2014	Receive preliminary survey results
Week of October 13	Final results presentation by Ron Vine

The timing and content of this survey will also assist the Park Board and City Council in providing an additional needs assessment tool for the repurposing of Fred Richards Golf Course. The Park Board will be asked to review and comment on the proposal at the October 6 Park Board meeting. The City Council is scheduled to receive a Fred Richards visioning proposal at the October 21 City Council meeting.

This item will be paid for through the 2014 contingency budget. The project was not specifically budgeted. It was requested by the Park Board as part of the master planning process. The total project cost is expected to be \$25,650. This includes two site visits at approximately \$1,000 per visit.

Attachments:

ETC Scope of Services Proposal



Scope of Services for Statistically Valid Survey

In order to accomplish the objectives for this project, ETC Institute will conduct the following tasks.

Task 1: Project Kick-off and Preparing the Survey Instrument

Task 1.1: Design Survey Instrument. ETC Institute will work in partnership with City of Edina staff to develop the survey instrument. It is anticipated that 3-4 drafts of the survey will be prepared before the survey is approved by the City of Edina for testing. The survey will be up to 6 pages in length (allowing for 24-32 questions, many with multiple components) and take 10-12 minutes to administer by phone.

Task 1.1a: On-Site Meeting. Ron Vine will meet on-site for one (1) day with City officials to discuss survey issues, the visioning consultant, and tour the park system.

Task 1.2: Design Sampling Plan. ETC Institute will prepare a sampling plan that will ensure the completion of at least **600 surveys of resident households in City of Edina.** The overall results for 600 completed surveys will have a precision of at least +/-4% at the 95% level of confidence.

Task 1.3 Survey Methodology. ETC Institute will administer the mail, phone, and web all with in-house staff. ETC Institute recommends administering the survey by a combination of mail/phone/ and web.

Task 1.4: Conduct Pilot Test. Once the draft survey is developed ETC Institute will test the survey with at least 10 residents before the survey is administered. Any problems or issues that are identified will be reported to the City and corrective action will be recommended and taken as appropriate.

Task 2: Administering the Survey Instrument and Analysis

Task 2.1: Mailing of Surveys. ETC Institute will design the sample so that a mail survey is first sent out by mail to a random sampling of over 3,000 residents of City of Edina, including a metered return envelope to ETC Institute/ETC Institute). The mail survey can also contain a message in the cover letter to non-English speaking households, i.e. Spanish, that will provide a 1-800 phone number to call to have the survey administered over the phone in that language and the web address to those who want to take the survey by the web.

Task 2.2: Web Survey. ETC Institute will develop a web version of the survey for those who want to take the survey over the web.

Task 2.3: Electronic Message to Those Receiving the Survey. Two days prior to receiving the mailed survey, each resident household receiving a survey will receive an electronic voice message, informing them about the survey and encouraging them to complete the survey.



Task 2.4: Initiate phone calling. Approximately 14 days after the surveys are mailed out, extensive phone follow-up is conducted either to encourage completion of the mailed survey or to administer the survey by phone.

This approach allows us to target specific demographic groups that may not have responded to the mailed survey to ensure that the demographic distribution of the sample closely compares to the actual composition of the community, by factors such as age, race, ethnicity, income, etc. ETC Institute will additionally use “weighting” as a statistical process in the analysis for further refinement of census comparisons.

Task 2.5: Quality Controls. ETC Institute has an ongoing quality control and quality assurance program in all surveys. The program is designed to give clients “error free” results, and all employees at ETC Institute are directly involved in the program. Dr. Elaine Tatham and Ron Vine, Project Manager directly manage the Quality Control program.

Task 2.6: Analyze Data. Following the completion of the survey, ETC Institute will perform data entry, editing, and verification of the survey responses for each survey. In addition to performing cross-tabulations, the analysis tools that will be performed on the resident survey data are listed below.

- **Task 2.6-A. Benchmarking Analysis (Normative Comparisons).** ETC Institute maintains national and regional benchmarking data from citizen surveys for more than 400 park systems across the country. Comparisons will be made for the City of Edina survey with other national providers, similar size communities, and in comparison to the previous survey results.
- **Task 2.6-B. Importance-Unmet Needs Priorities Analysis.** The Importance-Unmet Needs (I-U) Analysis is a tool that allows public officials to use survey data as a decision-making resource. The Importance-Unmet Needs analysis is based on the concept that public agencies will maximize overall investments by emphasizing improvements in those service categories where the level of unmet needs is relatively low and the perceived importance of the service is relatively high.
- **Task 2.6C. GIS Mapping.** ETC Institute will prepare maps that show the results of specific questions on the survey by location of respondents.

Task 3: Final Report and Presentation

Task 3.1 Development of Final Report. ETC Institute will provide a final report. At a minimum, the final report will include the following:

- an executive summary that includes a description of the survey methodology
- descriptive statistics for each survey question, including key demographic characteristics
- GIS maps and shape files that show key results on maps of City of Edina
- benchmarking Analysis
- results of the analysis tools including the I-U Analysis
- copy of the survey instrument.
- a copy of the database in SPSS or Microsoft Excel

Task 3.2: Survey Presentation. ETC Institute will make a presentation of findings of the survey results to City officials and hold a workshop to discuss strategic ways to seamlessly integrate the findings into short and long range decision-making.



Project Schedule for the Needs Assessment Process

Indicated below is a draft schedule for completion of the survey effort within 10-11 weeks of notice to proceed.

August 5-August 30, 2014

- Kick-off meeting on August 11, 2014 to visit with City officials, Board, Visioning consultant and tour park system.
- ETC Institute provides City examples of surveys for review
- Sampling plan finalized
- ETC Institute provides the City with a draft needs assessment survey
- City provides cover letter
- City staff review the content of the draft needs assessment survey and provide feedback to ETC Institute
- ETC Institute revises the needs assessment survey based on input from staff
- City approves the needs assessment survey instrument for testing
- Pilot test conducted
- Survey modified if needed and approved for printing (no later than August 20)

September 1-September 30, 2014

- Survey instrument mailed out
- Web-survey on-line
- Press releases issued
- Data collection begins for needs assessment survey
- Phone calling initiated
- Draft report prepared and sent to City
- Discussion held on draft report



October 1-October 21, 2014

- Draft report prepared and sent to City
- Discussion held on draft report by phone on October 2, 2014
- Data collection is completed for needs assessment survey
- Discuss changes to draft report
- Final Report delivered by October 13, 2014
- On site visit to conduct formal presentations and workshop the week of October 13, 2014



Responsibilities of the Parties

ETC Institute Responsibilities

ETC Institute's cost proposal includes the following services:

- designing the survey in association with the City of City of Edina
- requesting background information
- finalizing the methodology for administering the survey
- selecting a random sample of households for the City
- setting up the database
- testing the survey instrument
- postage for outbound and in-bound mail
- printing and mailing the survey
- labor for phone interviews
- web-site design
- long distance charges
- data entry for a minimum 600 surveys
- cross tabular analysis of survey results
- national benchmarking comparisons
- geocoding of results
- importance/satisfaction analysis
- a summary report with an executive summary, charts, and cross tabs
- presentation of survey and study findings and workshop
- 1 adobe copy of draft report
- 10 copies of the final report
- 1 day on-site for project kick-off meetings
- 1 day on-site to present findings

City of Edina Responsibilities

- provide pertinent background materials
- identify central issues to be addressed in the survey
- approve the survey instrument
- provide an electronic map of the City boundaries
- provide a signed cover letter for the survey document
- place notices in local newspapers and/or other media to inform the public about the survey
- identify requests for subanalysis of the data as appropriate
- arrange for locations and set-ups of presentations



City of Edina Citizen Survey Fee Breakdown ETC Institute	
<u>Services for Needs Assessment Survey</u>	
Number of Surveys	600
Level of confidence	95%
Margin of error	+/-4%
Length	6 pages
Administration	Mail/Phone/Web
Formal Report	Included
Sub-Analysis/Banners	Included
Benchmarking	Included
Kick-off Meeting	Included
Geocoding of surveys	Included
Importance-Unmet Needs Analysis	Included
Presentation of Findings on Site	
Professional Fees (plus expenses for site visits)	\$23,650

Project Fees are \$23,650, plus expenses for two (2) site visits (airfare, car rental, hotel, food, parking, etc.). Billings will occur by the following schedule:

1st Billing:	Upon completion of the initial site visit	15%
2 nd Billing:	Upon completion of initial draft survey	10%
3rd Billing:	Upon mailing of survey instrument	25%
4th Billing:	Upon receipt of draft report	40%
5th Billing:	Upon receipt of final report and site visit	10%