



# VILLAGE OF KEY BISCAYNE

Office of the Village Clerk

*Village Council*  
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**DATE:** October 28, 2014  
**TO:** Honorable Mayor and Members of the Village Council  
**FROM:** John C. Gilbert, Village Manager  
**RE:** Response to Request for Proposals (RFP) for Public Opinion/Needs Assessment Surveying Services

*Village Clerk*  
Conchita H. Alvarez, *MMC*

## RECOMMENDATION

It is recommended that the Village Council evaluate the proposals submitted by Kerr & Downs Research and ETC Institute in response to the RFP. The Village Council may require public presentations by the respondents regarding their qualifications, approach to the project, and ability to furnish the required services. The Village Council shall select in order of preference the firm deemed to be the most highly qualified to perform the required services.

## BACKGROUND

On September 9, 2014, the Village advertised a RFP for public opinion/needs assessment surveying services. Two submissions were received on October 16, 2014 at 2:00 PM. The two proposals have been provided. The Village Council may use the information submitted to select a consultant or schedule presentations to the Village Council at a future meeting.

Reviewed by Mr. Chad Friedman from Weiss Serota Helfman Pastoriza Cole & Boniske as to form and legal sufficiency.



MARKET RESEARCH  
proposal for

Village of Key Biscayne  
Public Opinion/Needs  
Assessment Surveying Services

**Submitted by:**  
**KERR & DOWNS RESEARCH**  
2992 Habersham Drive  
Tallahassee, Florida 32309

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## Letter of Intent

October 15, 2014

Conchita Alvarez, Village Clerk  
Village of Key Biscayne  
88 West McIntyre St., Suite 220  
Key Biscayne, FL 33149

Ms. Alvarez:

Thank you for the opportunity to present Kerr & Downs Research's proposal for conducting statistically valid public opinion polling services for the Village of Key Biscayne. While our proposal details our experience and qualifications, the following outline summarizes our strengths and why you should select us to represent you in this important research.

- **Specialization/Excellence in Research** – unlike other firms that provide broad-based consulting services, Kerr & Downs Research has always specialized in research. Our partners have won national awards for research methodologies and articles. Our academic excellence coupled with the “street” knowledge we have gained in over 1,000 studies will ensure that your study is cost effective, valid, and actionable.
- **Expertise with Government Agencies**– with over 200 studies for governments such as City of Miami Beach, Sarasota County, City of Orlando, City of Altamonte Springs, City of Winter Park, City of Ocala, Town of Davie, City of Palm Beach Gardens, and Broward County, we understand working with government entities.
- **Corporate Experience** – with projects for United Airlines, Boeing, Federal Express, BellSouth, Publix, Delta Air Lines, Club Med, and Prudential, we understand a bottom line orientation.
- **Strategic Recommendations** – with three Ph.D.s, Kerr & Downs Research will add value to your research dollar by developing action-oriented strategic recommendations.
- **Presentations** – I will be your Project Director. I have represented government at all three levels, Fortune 500 corporations, and non-profit organizations in hundreds of presentations to boards, press conferences, media presentations, etc. You will feel comfortable in how I represent the Village and its research to various audiences.

Thank you again for the opportunity to provide you with this proposal for our research services. Our proposal is arranged to include all information required to meet the specifications of the RFP.

We hope to begin working with Key Biscayne very soon.

Sincerely,



Phillip Downs, Ph.D.  
Senior Partner, Kerr & Downs Research  
850.906.3111  
pd@kerr-downs.com

## Scope of Services

Kerr & Downs Research will apply stringent survey research protocols when conducting the Village of Key Biscayne's study.

## Population Definition

For the study of residents, everyone 18 and older with a landline or cell telephone or access to the internet at home, work or in a public facility will be eligible for the study. This broad population definition covers over 98% of the residents of Key Biscayne ensuring that the study results can be representative and generalizable to all residents.

## Sampling Frame

The sampling frame for the study of residents will be all working (not just listed) residential landline and cell telephone numbers in Key Biscayne, plus all people 18 or older who have internet access and are residents. The latter part of this sampling frame is operationalized by residents opting into the study that will be posted and publicized. This sampling frame is virtually identical to the population definition, this maintaining the ability to generalize results.

## Sampling Process

Systematic random sampling will be applied to the sampling frame of all working landline and cell telephone numbers in Key Biscayne. The sample of telephone numbers will be obtained from Survey Systems Inc. or MSG, two of the three firms that provide RDD samples to market research firms nationwide. The RDD sample will be divided into replicates, and each replicate will be worked extensively to ensure that hard-to-reach households are included in the study.

## Sample Size

The optimal sample size is a function of budget, tolerance for error in results, and importance of examining segments of the total sample. Sampling errors are exponentially and inversely related to sample sizes, i.e., the sample must be increased by a factor of four to gain 50% efficiency in sampling error. For example, as the sample size increases from 200 to 800, the sampling error decreases from  $\pm 6.9\%$  points to  $\pm 3.45\%$  points. Regarding tolerance for error, Key Biscayne will need to establish that criterion (of course, Kerr & Downs Research will provide advice and counsel). Importance of segmentation analysis also drives sample size decisions. For example, a sample of 384 gives a  $\pm 5\%$  point sampling error for the entire sample, but a  $\pm 6.9\%$  points sampling error for results for males and females.

We recommend the following sample size for Key Biscayne, however, we present costs for larger sample sizes in the Fee Proposal of the proposal so we can have a discussion with Key Biscayne officials about the trade-offs among sample size, sampling error, tolerance for error, and analyses of segments of the population.

Resident study – **Sample size = 500.**

This allows for a sampling error of  $\pm 4.4\%$  points given a confidence level of 95%.

## Questionnaire Development

The first step in questionnaire development is to meet with Key Biscayne officials (market research team, department heads, council members, mayor) to gather input for the questionnaire. From results of these

meetings, Kerr & Downs Research will construct a questionnaire draft. This draft will be presented to individuals designated by Key Biscayne for critique. Kerr & Downs Research will make edits and this iterative process will be followed until there is agreement on a questionnaire that can be pretested.

The final draft questionnaire for residents will be pretested on at least 10 individuals. Issues concerning understanding, question flow, etc. will be examined as well as questionnaire length.

Kerr & Downs Research recommends that questionnaires not exceed 10 minutes out of courtesy and respect for residents. However, cities routinely push for longer questionnaires, and our price can accommodate a 12-15 minute questionnaire if necessary. While our price can also accommodate two or three open-ended questions, we caution about over-use of open ended questions because of the extra burden placed on residents and because of inter-coder reliability in summarizing results of open-ended questions.

## Data Collection

In our sampling frame and population definition, we tip our hand about data collection. **Kerr & Downs Research recommends telephone surveys for the probability sampling segment of the study** rather than mail, personal, or internet surveys. Compared to mail surveys, telephone surveys:

- Are more representative – quotas can set for specific subgroups of the population
- Have lower non-response bias – phone surveys have been shown to have a higher response rate than mail surveys
- Enable exploration of issues with probing – telephone surveys allow for follow-up questions which provide greater insight into citizens answers
- Provide better open-ended responses – telephone surveys are known to have more in-depth responses to open-ended questions
- Promote less cheating to future answers – in addition extensive skip patterns can be utilized with a computer assisted telephone interviewing (CATI)
- Ensure knowledge of who completed the survey – with mail surveys there is no way to know whether the survey was completed by an adult or a 14-year old who found the survey on a coffee table.

Personal surveys are excellent, but cost prohibitive typically costing three to five times more than telephone surveys.

**We recommend supplementing the probability sample obtained via telephone interviewing with a non-probability internet sample** designed to have no cost and to introduce an element of democracy in to the study. That is, every resident in Key Biscayne who has access to the internet at home, work, or in a public location can be invited to participate just as they are invited to participate in the democratic process.

We recommend analyzing results from internet surveys separately from the results from the telephone surveys. If analyses of telephone and internet surveys are reasonably similar, we can use internet results in crosstab analyses to increase reliability of results. The American Association of Public Opinion Research recently completed an extensive study of survey results of telephone and internet data collection. While AAPOR views internet surveys more favorably than it once did, it is still not willing to give internet surveys the sample legitimacy as telephone surveys. For that reason we recommend keeping results from the two data collection processes separate, and basing the “final” results strictly on telephone surveys. Internet

surveys can possibly increase reliability of segment analyses, plus give every resident an opportunity to participate.

*Subject Selection.* Telephone surveys that do not have a random process for selecting the person within a residential household to interview result in too many older respondents and too many female respondents. To prevent this type of bias, Kerr & Downs Research uses the Hagan-Collier technique which requires interviewers to rotate the person within the household who is eligible to complete the interview across the following four designations:

- Youngest male over 18
- Oldest male
- Oldest female
- Youngest female over 18

Interviewers will make up to five calls across five separate days to complete an interview with a selected household. This type of persistence reduces bias created from interviewing easy to reach respondents and increases the likelihood that hard-to-reach residents (e.g., non-English speaking or elderly/young residents) will be surveyed.

*Quality Control of Interviewing Process.* Kerr & Downs Research maintains a portfolio of approximately 45 experienced interviewers. All have experience with complex telephone interviews.

*Facility.* Kerr & Downs Research's office at 2992 Habersham Drive, Tallahassee, Florida will be used as the interviewing facility. The facility is equipped with thirty CATI (Computer Assisted Telephone Interviewing) stations. CATI stations facilitate a completely computerized interviewing process that reduces interviewer-induced bias and mistakes.

*Interviewer Training.* The project director and the research director will be responsible for interviewer training. Topics to be covered in the training sessions will include:

- Purpose of the survey
- How the information will be used
- Sampling procedure
- Selection of appropriate household member
- Detailed review of the questionnaire
- Methods for handling objections
- Coding procedures
- Maintaining a telephone log
- Role playing and practice interview

Standardized Survey Interviewing by Floyd J. Fowler, Jr., and Thomas W. Mangione will be the reference guide for the training session as well as a training guide written by Phillip Downs.

*Pre-test.* The questionnaire will be pre-tested on ten individuals. Modifications to the questionnaire will be made based on the pre-test analysis.

*Interviewing Procedure.* To maximize the probability of reaching the appropriate household member, up to three telephone calls will be made to each designated telephone number on different days and at different times of the day. Interviews will be conducted according to the following schedule:

- 4:00 p.m. - 9:00 p.m. Weekdays
- 10:00 a.m. - 9:00 p.m. Saturdays

- 12:00 p.m. - 9:00 p.m. Sundays

*Spanish-Speaking Experience & Capabilities.* If a respondent is found to speak Spanish or another language, the call will be routed to one of our bilingual interviewers. Kerr & Downs Research completes, on average, about 10 bilingual telephone survey projects per year, or about half of our projects. Project size for bilingual English/Spanish survey projects typically ranges from 400 to 20,000 completed interviews.

Carmen Rosabal Hiers functions as Project Director for Latino Projects. Carmen’s native language is Spanish (born in the Dominican Republic). Carmen has spent 15 years in the Latin America and U.S. Latino markets. Her corporate work experience includes overseeing domestic and international research and public relations programs for companies like FedEx, Western Union, Sony Ericsson, and Abbott Pharmaceuticals.

In addition to conducting studies on a regular basis in English/Spanish, Kerr & Downs Research has also conducted studies in Creole, Mandarin Chinese, Portuguese, German, Italian, French, Korean, and Japanese. In addition to our own staff, we hire instructors and graduate students in languages from Florida State University to strengthen our language capabilities.

*Computer Assisted Interviewing.* As they are interviewing residents, interviewers will record answers directly into computers. The software program that enables direct computer data entry will be written to exclude out-of-range responses and to assure that interviewers follow the appropriate skip patterns throughout the study. This process eliminates potential errors inherent in separate, manual data coding and entry steps.

The field supervisor will validate a minimum of 10% of the completed telephone interviews. Validation will be completed via the telephone. Positive identification of the respondent will be made. If a positive identification cannot be made, the questionnaire will be discarded.

## Focus Groups (Optional)

A properly conducted focus group provides a wealth of information that can drive strategic decisions. A poorly conducted focus group is an expensive waste of time and money. Based on our academic training and based on conducting over 1,000 focus groups for Fortune 500 companies, government agencies, and associations, the keys to a successful focus group are:

1. **Backgrounding**
2. **Moderator**
3. **Group composition**
4. **Exercises**

### 1. Backgrounding

Backgrounding involves meeting with the client to:

- Determine the strategic uses of the information generated by focus groups
- Define the characteristics of the individuals who should be participating in the study
- Develop a list of information needs that can be translated into a focus group script

Kerr & Downs Research believes that the Backgrounding step is the most important step in the research process. We assist clients in focusing on strategically relevant information that should be translated into the focus group script.

We guide clients away from “wouldn’t it be nice to see if” research topics toward research topics that are critical for making strategic decisions such as messaging, brand name, positioning strategy, value proposition, target market delineation, pricing, etc.

Getting the right topics and the right focus group participants will be ensured by the Backgrounding discussion. Ideally, Backgrounding is done in person, but it can be done via a conference call.

## 2. Moderator

**The moderator is the most important ingredient in the focus group process.** Good, experienced moderators know how to:

- Maximize non-verbal communication
- Ignore over-bearing participants
- Encourage shy participants
- Avoid a halo effect in which one or two participants’ comments sway the entire discussion
- Maximize synergistic discussion
- Identify when participants are giving socially acceptable responses
- Make participants give honest and emotional responses
- Use techniques such as Imaging to enrich the discussion
- Avoid answering participants’ questions
- Ensure that all key research issues are explored
- Skip around the script if synergistic discussion will be optimized by not following the script

**Phillip E. Downs, Ph.D., or Joseph St. Germain, Ph.D. will moderate all focus groups.** A brief summary of their focus group qualifications is as follows:

- Trained in focus group and other qualitative research techniques during their doctoral programs
- Moderated over 1,000 focus groups for:
  - Corporate clients (e.g., Federal Express, United Airlines, Delta Airlines, Boeing, Club Med)
  - Association clients (e.g., American Water Works Association, American Bar Association, Academy of General Dentists, Institute of Food Technologists, American Society of Heating, Refrigerating, and Air-Conditioning Engineers)
  - Government clients (e.g., City of Miami Beach, FEMA, Florida Department of Financial Services, Florida Department Agriculture and Consumer Services, Florida Department of Revenue)
- Written articles on how to conduct focus groups
- Taught over 5,000 executives how to conduct focus groups at the American Society of Association Executives Management Certificate Program
- Taught over 20,000 students at the University of North Carolina, The College of William and Mary and Florida State University how to conduct focus groups.

- Received honors from the American Marketing Association and the Southern Marketing Association for qualitative research techniques

### 3. Group Composition

Focus groups are designed to be exploratory. The best focus groups are characterized by synergistic discussion. One person's comments trigger shared experiences and history with the topic in the minds of other participants and they respond with their comments. The best focus groups are characterized by minimal conversation by the moderator. If the discussion sounds like a group of friends being gently guided by the moderator, chances are it is a good focus group. Conversely, if the discussion consists of a series of one-on-one exchanges between the moderator and successive participants, then the discussion is missing the one essential element of a good focus group – synergy.

Expert moderators agree<sup>1</sup> that focus groups whose participants are similar with respect to experiences with the topic/product and with respect to critical social and demographic characteristics have a better chance of producing synergistic discussion. Participants must not have prior social networks, and it is important that all participants feel as if they are the same level with respect to knowledge about the topic. Common frames of reference with regard to the product or topic facilitate synergistic discussion.

Individuals in a group that have little common experience and need for the product or topic cannot build on others' comments. Demographic representation **across** focus groups is generally a more valid goal than demographic representation **within** individual groups.

### 4. Exercises

Kerr & Downs Research has invented and perfected several techniques for ensuring that synergistic and actionable discussion takes place during focus groups. These exercises ensure that all participants provide input and that creative ideas are generated during focus groups.

*Imaging* is one of the exercises KDR has perfected to stimulate independent thinking and group synergy. Focus group participants are requested to close their eyes and to develop a mental image of the company or brand or situation. Then they are requested to draw the mental image they have in their heads. Participants then explain their drawings to others and share their mental images. The drawings reveal emotional reactions to the concepts being studied that would never surface through traditional focus group questioning techniques.

The "*Sunshine*" technique is another exercise that Kerr & Downs Research uses to stimulate independent thinking during focus groups so dominant personalities do not limit creative and independent thinking. We used this technique in helping the Florida Department of Transportation develop a list of issues that are important to drivers when using the State of Florida transportation network. The sunshine technique

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<sup>1</sup> Referencing members of the Qualitative Research Consultants Association (QRCA) of which Phillip Downs, Ph.D. and Joseph St. Germain, Ph.D. are members. QRCA is an international association of focus group moderators and other qualitative research consultants. QRCA members share expertise and experiences in an effort to advance the art and science of qualitative research.

helped us develop a list of over 140 issues that are important to drivers. We then used another focus group technique (*normalization*) to reduce the list of issues to the ten most critical issues.

**Written results of all focus group exercises become part of the final report that will be given to the client.**

**Responsibilities:** Kerr & Downs Research, in addition to adhering to scientifically accepted procedures, agrees to:

- Assume full responsibility for all aspects of identifying and securing focus group facilities
- Recruiting participants and confirming their participation
- Developing screeners and discussion guides
- Moderating
- Analysis
- Reporting findings via written and oral reports

## Strategic Analysis

Kerr & Downs Research will not only be the researcher, but will also function as the "strategist." That is, we will not only evaluate citizen satisfaction, but **we will also develop models that will show how to increase citizen satisfaction in various areas and within specific demographic segments of the citizenry.**

Kerr & Downs Research utilizes **Structured Equation Modeling, AnswerTree Analysis, and GIS Mapping** to identify the factors that have the greatest impact on attitudes and behaviors. While Key Biscayne clearly needs and expects high quality research regarding residents' opinions and behavior motivators, KDR will go far beyond researching to providing strategic information to the Key Biscayne and to its team that will aid in increasing citizen satisfaction.

All market research firms know how to analyze data, correct? Yes, but all market research firms do not know how to:

- Conduct sophisticated analyses such as:
  - Multidimensional scaling
  - Conjoint analyses
  - AnswerTree analyses
  - Cluster analyses
  - Structured Equation Modeling
  - Chi-square automatic interactive detection analyses
- Transform results of sophisticated analyses into easy-to-understand graphics

Key Biscayne will receive strategic recommendations based on our sophisticated statistical analyses capabilities and our marketing experience.

**No other firm** provides the level of **sophisticated analysis coupled with marketing experience** gained from working with Fortune 500 companies, international and national associations, and federal, state and local governments. Our combination of attributes translates into value-added strategic recommendations for Key Biscayne.

Given three doctoral degrees on staff, Kerr & Downs Research possesses a full range of multivariate statistical techniques. We use factor analysis and discriminant analysis to help clients discover the most profitable market segments. We use multidimensional scaling to develop brand positioning maps that

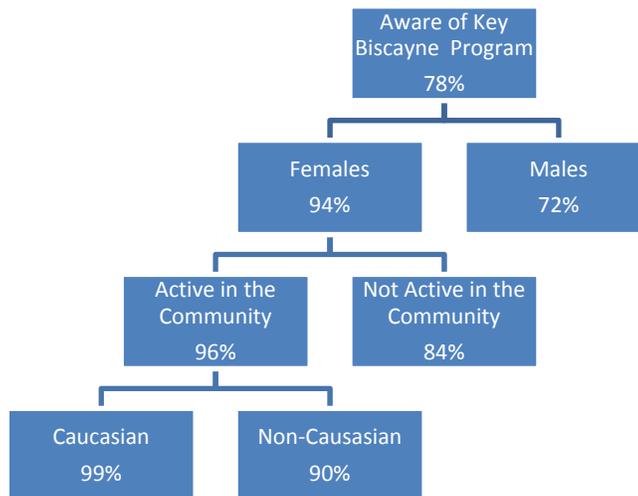
show how clients are positioned among competitors and show how clients' brands are positioned vis-à-vis brands from competitors.

We will illustrate a few of the sophisticated analyses that can be applied to Key Biscayne's survey results.

### AnswerTree Analysis

AnswerTree analysis can identify the characteristics/variables that are most likely to predict whether or not visitors are satisfied with various elements of Key Biscayne. The diagram shown in Figure 1 shows a mock AnswerTree analysis.

FIGURE 1: MOCK ANSWERTREE DIAGRAM – AWARENESS OF KEY BISCAYNE PROGRAMS



### Interpretation of AnswerTree Diagram

Based on the surveys, nearly four out of five visitors (78%) are aware of Key Biscayne's program. Gender is the number one predictor of whether or not individuals are aware of Key Biscayne's program as females are more likely to be aware of the program (94%). The second most powerful predictor of whether or not one is aware of Key Biscayne's program is community activity as residents active in the community and are female (96%) are more likely to be aware of Key Biscayne's program. The third most powerful predictor of whether or not one is aware of Key Biscayne's program is race as Caucasians, who are active in the community and female are more likely (99%) to be aware of Key Biscayne program.

Armed with the results of the AnswerTree analysis, Key Biscayne can tailor its future services and messages to reinforce understanding among segments that already are aware of Key Biscayne's program, and Key Biscayne can focus its services and messages on segments that are not aware of the program.

### Structural Equation Modeling

As shown in the figure on the next page, the main predictors of satisfaction with Key Biscayne were 1) age (45+), 2) gender (females), 3) attitude toward government, and 4) income (\$50,000+). Several other factors influence many of the primary drivers of satisfaction.

FIGURE 2: STRUCTURAL EQUATION MODEL PREDICTING CITIZEN SATISFACTION WITH KEY BISCAYNE



Armed with this information, Key Biscayne will know which citizen segments are favorably predisposed and which segments will require different approaches to encourage higher levels of satisfaction.

### Crosstabulations

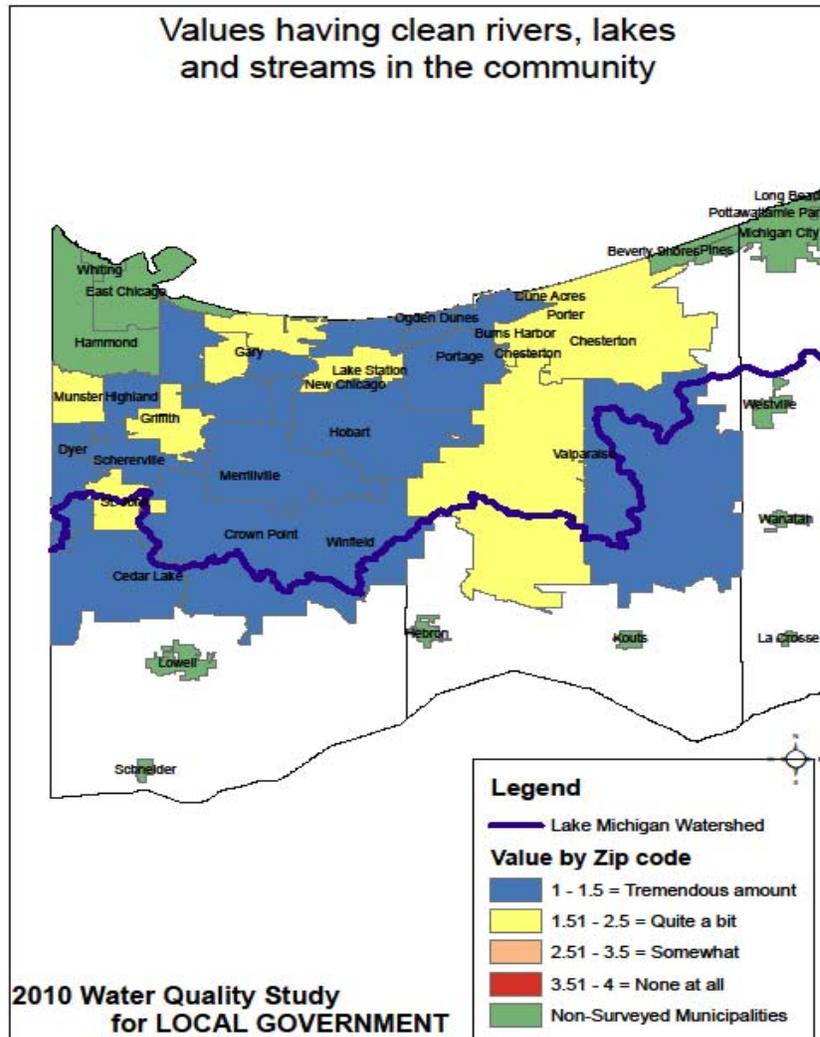
Of course we also provide more typical analyses such as crosstabulations or examining how segments of the total sample answer questions. Unlike most market research firms, we place no limit on the number of crosstabulations Key Biscayne may have under the contract. Unlike most firms that leave crosstab data in software output (less elegant, less easily read and interpreted), we provide elegant and easy to read crosstab tables.

### GIS Mapping

GIS Mapping allows for Key Biscayne officials to determine which services are required in particular areas of Key Biscayne. GIS Maps are clearer than data tables and easily allow Key Biscayne officials to determine areas of need within Key Biscayne.

For example, if one area of Key Biscayne was found to be more concerned about crime or less satisfied with police protection, Key Biscayne could increase patrols in that area. In an area with low satisfaction in parks and recreation, Key Biscayne could prioritize park refurbishments in that area. Finally, if one area of Key Biscayne stands out as less satisfied overall, Key Biscayne could hold a town meeting in that area.

We present a GIS Map of a region in Northwest Indiana. Given this information, area officials could quickly and easily determine which areas of the region required increased educational outreach efforts on the value of clean rivers, lakes, etc.

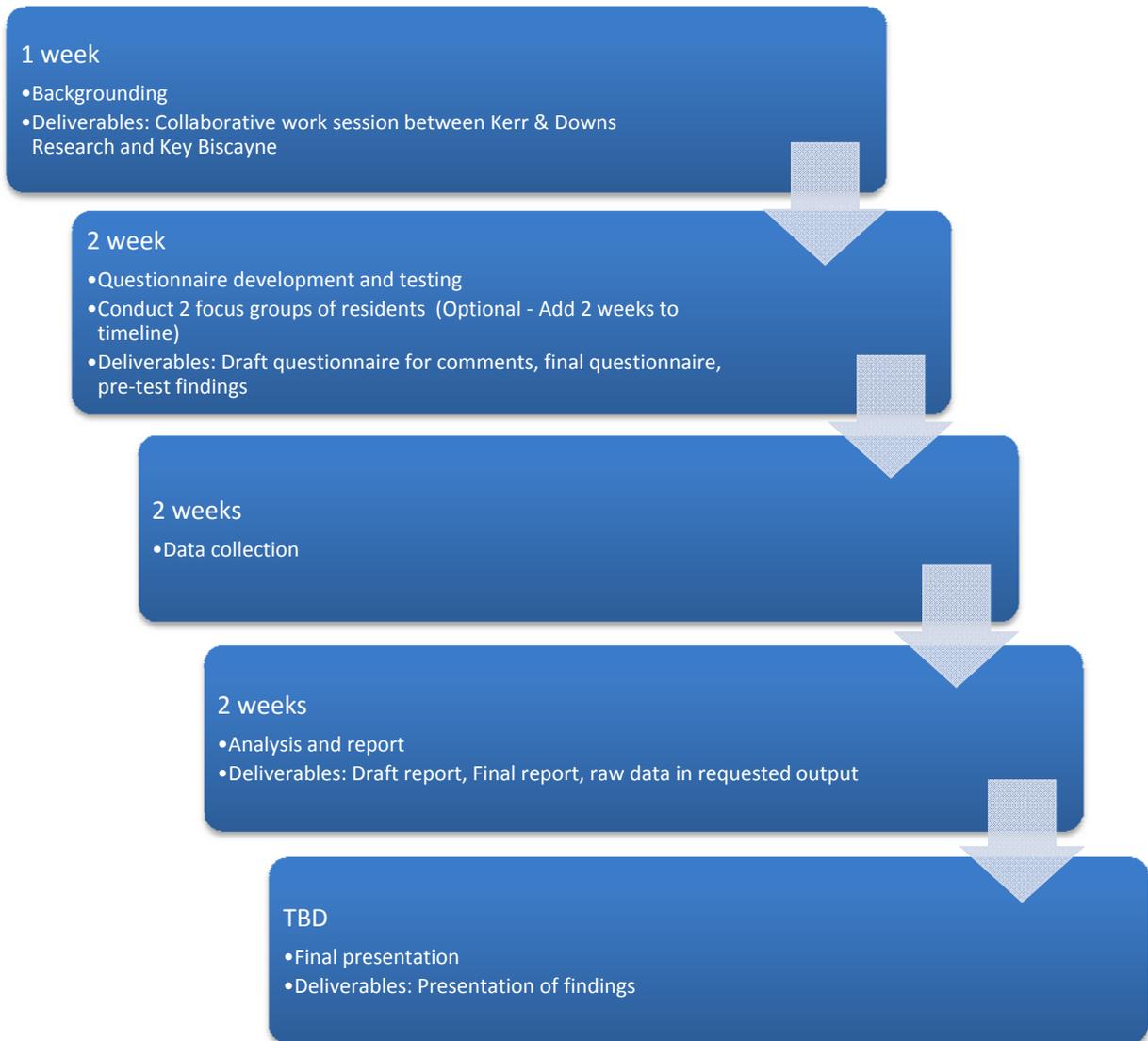


## Strategic Recommendations

The last component of successful opinion research involves strategic recommendations that will accompany the final report. Kerr & Downs Research draws upon its marketing experience (developed hundreds of marketing strategies for corporate and government clients) and expertise (taught marketing to college students and executives of Fortune 500 companies) to provide value added strategic recommendations to our research. We write the final report with a focus on strategic implications. We remain available after the study to discuss strategic implications and options with clients.

## Timeline

The following schedule can be adjusted to fit the needs of Key Biscayne.



Timing of studies is affected by clients, and the time frame above is predicated on quick turnaround by Key Biscayne on documents submitted for review.

## Kerr & Downs Research's Qualifications

### Organizational Profile

Phillip E. Downs, Ph.D., and John R. Kerr, D.B.A. were the founding principals of Kerr & Downs Research in 1979. Joseph St. Germain, Ph.D. joined the firm in 2004 and has recently been appointed Vice President. Roger Formisano, Ph.D., has joined the firm as an associate partner. In the late 1970s, Drs. Kerr and Downs worked on local government studies for the City of Tallahassee and Leon County governments. From this work, Kerr & Downs Research, a Chapter S Corporation, was formed and other non-profit clients including state government departments and associations were added to the client list. Since the mid 1980s, Kerr & Downs Research has maintained its government and association clients while branching out into national and international association clients for whom we have conducted research in the US, Canada, South America, Europe, and Asia.

From the mid 1980s to the present, we have added name brand corporations such as Boeing, Publix, Prudential, BellSouth, Delta Air Lines, Eastman Kodak, Club Med, Texaco, United Airlines, the Mead Corporation, and Hutchison Whampoa to our client list. We count major international associations such as the Academy of General Dentistry, the American Bar Association, the American Society of Association Executives, the American Society of Heating, Refrigerating, and Air-Conditioning Engineers, and Soroptimist International of the Americas as clients.

Government clients include a dozen or so departments of the State of Florida and dozens of municipal governments. We have surveyed citizens in several local Florida governments including Sarasota County, Miami Beach, Altamonte Springs, the Town of Davie, Leon County, Ocala, Tallahassee, Orlando, Winter Park, Lake City, Duval County, Miami-Dade, Broward County, Mt. Dora, Okaloosa County, Walton County, Brevard County, Cocoa Beach, and Palm Beach Gardens. We have conducted dozens of market research projects for the federal government (FEMA, US Army Corps of Engineers) and state/regional government agencies (New York City, Philadelphia, New Jersey, Southwest Florida Water Management District).

The firm currently operates out of its Florida office, now as an LLC, that contains a 30-station CATI (computer assisted telephone interviewing) system and a focus group facility. All analysis and report preparation are conducted from this site.

<b>Contact name:</b>	Phillip Downs, Ph.D., Senior Partner
<b>Address:</b>	2992 Habersham Drive, Tallahassee, FL 32309
<b>Contacts:</b>	850.906.3111 850.906.3112 (fax) pd@kerr-downs.com
<b>Years in Business:</b>	1979 to present (35)
<b>Type of Ownership:</b>	Corporation
<b>Type of Organization:</b>	Single office
<b>Size of Firm:</b>	10 full-time and 45 part-time employees
<b>Professional Affiliations:</b>	American Association of Public Opinion Research, Marketing Research Association, Qualitative Research Consultants Association, American Marketing Association

## Kerr & Downs Research Government Clients

1. US Department of Agriculture
2. Federal Emergency Management Agency
3. US Army Corps of Engineers (in conjunction with Hazards Management)
4. Florida Department of Agriculture and Consumer Services
5. Florida Department of Business and Professional Regulation
6. Florida Department of Financial Services
7. Florida Department of Community Affairs
8. Florida Attorney General
9. Florida Highway Safety and Motor Vehicles
10. Florida Department of Revenue
11. Florida Department of Transportation
12. Florida Department of Health
13. Florida Prepaid College Board
14. Georgia Department of Transportation
15. Northeast Florida Regional Planning Council
16. St. Johns River Water Management District
17. Southwest Florida Water Management District
18. Tampa Bay Water
19. Broward County
20. Miami-Dade
21. Withlacoochee Regional Planning Council
22. Southwest Florida Regional Planning Council
23. West Florida Regional Planning Council
24. Leon County
25. City of Lake City
26. Central Florida Regional Planning Council
27. City of Orlando
28. Palm Beach Gardens
29. Treasure Coast Regional Planning Council
30. Apalachee Regional Planning Council
31. City of Tallahassee
32. South Florida Regional Planning Council
33. East Central Florida Regional Planning Council
34. City of Ocala
35. Okaloosa County
36. Tampa Bay Regional Planning Council
37. Mt. Dora
38. Carteret County (NC)
39. Coastal Georgia Regional Development Council
40. Juvenile Welfare Board of Pinellas County
41. Space Coast Office of Tourism
42. Leon County Tourist Development Council
43. Cocoa Beach
44. Brevard County
45. Duval County
46. Sarasota County
47. City of Altamonte Springs
48. City of Winter Park
49. Gwinnett County
50. New York City
51. City of Philadelphia
52. Southeast Pennsylvania/Northeast New Jersey Regional Task Force
53. Connecticut Department of Health
54. Northwest Indiana Regional Planning Council
55. University of Miami
56. Columbia University
57. University of Pennsylvania
58. University of Miami
59. University of West Florida
60. South Walton Tourist Development Council
61. Florida State University
62. Town of Davie
63. VISIT FLORIDA
64. University of Louisville
65. City of Miami Beach
66. Orange County Department of Health
67. Connecticut Department of Health (in conjunction with PDAStats)

## **Municipal Government Experience**

Kerr & Downs Research has worked on many municipal market research studies including Miami Beach, Gwinnett County, Ocala, Tallahassee, Winter Park, Palm Beach Gardens, Leon County, Lake City, Orlando, and every single county in Florida as part of a study involving 18,800 telephone interviews statewide for the Florida Department of Community Affairs. We have conducted over 200 studies for municipal governments and interviewed over 1,000,000 citizens by telephone, internet and mail in municipal government studies. Rather than talking about our studies with municipal governments, we encourage officials at Key Biscayne to contact our references.

Descriptions of selected municipal government projects are located in the References section on p. 19.

## **Why Select Kerr & Downs Research?**

- ✓ We have a successful track record with municipal resident opinion studies.
- ✓ We have completed over 200 research studies for municipal, county, state and federal governments. We understand public administration.
- ✓ We have three Ph.D.s on staff who have won market research awards from the American Marketing Association, the Southern Marketing Association, the College of William and Mary, the University of North Carolina at Chapel Hill, Florida State University, and the American Society of Association Executives.
- ✓ Our interviewing personnel and processes are state of the art.
- ✓ Our senior partner has taught market research to over 20,000 college students and over 5,000 executives.
- ✓ Our reports are colorful, easy reads that will not collect dust.
- ✓ We possess a complete range of data collection and analyses capabilities that can help Key Biscayne in future studies.
- ✓ We specialize in helping governments develop plans that enhance services they provide to citizens.
- ✓ We “wrote the book” on conducting telephone surveys for local governments.
- ✓ Our project managers have master’s and bachelor’s degrees in research and related fields.
- ✓ Check with our references; we are easy to work with and we are responsive. You will be proud of how we represent Key Biscayne and its research to the public, and your project will be on time and on budget.

## Fee Proposal

Kerr & Downs Research suggests three alternatives for the Village of Key Biscayne study. One option includes the minimum requirements from the RFP. The second option includes two focus groups of Key Biscayne residents. The third option includes the focus groups and a larger sample size for a more accurate and representative survey. In addition, external costs such as in-person meetings may be applied, if and when necessary.

### Option 1

<i>Service</i>	<i>Cost</i>
Questionnaire development & testing	\$ 2,000
Telephone survey (n=500)	\$11,000
Internet surveys posted on City's website and other locations	NC
<u>Analysis &amp; final report</u>	<u>\$ 5,000</u>
Total	\$28,000*

### Option 2

<i>Service</i>	<i>Cost</i>
Questionnaire development & testing	\$ 2,000
Telephone survey (n=500 residents)	\$11,000
2 Focus Group of residents (at Village of Key Biscayne facilities)	\$ 5,000
Internet surveys posted on City's website and other locations	NC
<u>Analysis &amp; final report</u>	<u>\$ 5,000</u>
Total	\$23,000*

### Option 3

<i>Service</i>	<i>Cost</i>
Questionnaire development & testing	\$ 2,000
Telephone survey (n=800 residents)	\$17,500
2 Focus Group of residents (at Village of Key Biscayne facilities)	\$ 5,000
Internet surveys posted on City's website and other locations	NC
<u>Analysis &amp; final report</u>	<u>\$ 5,000</u>
Total	\$29,500*

\*\$1,500/day for trips to the Village of Key Biscayne plus the cost of travel. These trips can be used for developing the questionnaire and/or presenting results and recommendations to council, mayor, staff, media, etc. Costs do not include incentives for focus group respondents.

## **Kerr & Downs Research's Team & Services**

### **Phillip Downs, Ph.D., Project Director for study with Key Biscayne**

Downs is a nationally known expert in market research:

- Ph.D. in business with specialization in market research
- Won market research awards from the American Marketing Association, Southern Marketing Association, Florida State University, College of William & Mary, University of North Carolina, Market Research Society
- Published over 50 market research articles in prestigious journals such as the Journal of the Market Research Society, Journal of Business Research, American Marketing Association Proceedings, etc.
- Project Director for more than 1,000 research projects for government agencies, corporations and non-profits
- Taught market research to mention 1,000+ executives and 20,000+ college students worldwide
- Received honors from the American Marketing Association and the Southern Marketing Association for research techniques
- Delivered over 50 presentations to national and international academic and professional associations on market research
- Developed marketing and communication strategies for Fortune 500 companies such as Delta Air Lines, Boeing, Texaco, Club Med, Interstate Hotels and Resorts, BellSouth, Prudential, as well as for hundreds of government and association clients.
- Certified as an expert witness in market research

Downs will be involved, day-to-day, in the Village's research. He will design all research designs and write all questionnaires. He will be the key liaison with Key Biscayne and make all presentations.

### **Joseph St. Germain, Ph.D., Assistant Project Director**

St. Germain specializes in multivariate statistical techniques such as:

- Structural equation modeling
- Discriminant analysis
- Linear and log-linear regression
- Multidimensional scaling
- Principal components analysis

In short, St. Germain will take the data and translate it into easy to understand models that predict attitudes and behavior. St. Germain will also provide data for GIS mapping and create GIS maps.

St. Germain has worked closely with government related research for the City of Ocala, the City of Miami Beach, the City of Altamonte Springs, the City of Winter Park, the Town of Davie, the City of Philadelphia, and New York City. He has directed market research studies for Fortune 500 companies and other government clients including:

- Southwest Florida Water Management District
- Florida Department of Community Affairs
- Florida Department of Health
- Connecticut Department of Health
- Florida Department of Financial Services

### **Roger Formisano, Ph.D. Associate Partner**

- Roger Formisano, Ph.D., Marketing, University of North Carolina-Chapel Hill, Associate Partner, will be available in Phillip’s absence. Over the past 20 years, Formisano has functioned as the CEO of a Fortune 500 firm, served on boards of major corporations, consulted with the Governor’s Office in Wisconsin, consulted with the published over 30 articles in academic and trade journals, directed multiple market research projects, received numerous honors and awards from the Tallahassee Society of Association Executives and Southern Marketing Association, and is Chairman of the Florida State University Marketing Department.

### **Rachael Powell, B.A., Research Director**

Rachael will be involved with data collection and report preparation. She has worked on projects for Fortune 500 companies and government clients including:

- Florida Prepaid College Program
- Gwinnett County Police Department
- City of Miami Beach
- Southwest Florida Water Management District
- University of Louisville

### **Carmen Rosabal Hiers, B.A., Project Director for Latino Projects**

Carmen will oversee questionnaire translation, cultural compatibility, and data collection. She ensures that bilingual parts of our studies are culturally and grammatically correct. Hiers' qualifications and experience for leading the Spanish-speaking part of Key Biscayne’ research include:

- Bicultural, bilingual communications professional with more than 25 years of experience
- 15 years working in the Latin America and U.S. Hispanic markets.
- Corporate work experience includes:
  - Overseeing domestic and international public relations programs for companies such as:
    - FedEx
    - Western Union
    - Sony Ericsson
    - Univision
    - MasterCard
    - Microsoft
    - Benetton
    - Discovery Networks Latin America

### **Paul Wotherspoon, Director of Data Collection**

Paul worked for the State of Florida for 25 years as a computer technology specialist. He has managed Kerr & Downs Research’s data collection effort for 10 years. Paul has directed studies that have:

- Included 19,000 telephone interviews
- Involved sophisticated quota and cell designs
- Included over 150 telephone interviewers

The validity and reliability of the Village’s data are in Paul’s competent and experienced hands. He has managed over 200 data collection projects and over 500 interviewers while at Kerr & Downs Research. A few of the projects for which Paul has managed data collection projects include:

- Delta Air Lines
- United Airlines
- Florida Department of Financial Services
- Tampa Bay Water
- Southwest Florida Water Management District

Resumes for Kerr & Downs Research staff are included in Appendix A.

## Project Staff Responsibilities

The staffing plan detailed below has been carefully developed to make certain that Kerr & Downs Research has staffing resources to make the Key Biscayne project a top priority. Downs, our Senior Partner, will be the lead person on the study. His commitment will be to the day-to-day activities required to make the Key Biscayne research a success. The Key Biscayne project will represent about 10% of our overall staffing effort during the project. We will have adequate staffing and flexibility during the assignment to exceed the Village’s needs and expectations in terms of work flow and work quality.

### Staffing plan and oversight of various projects

Position	Staff	Description of Duties	% FTE
Project Director	Phillip Downs	Develop the research design, construct all questionnaires, supervise all analyses, and supervise all reports, and present result and recommendations to Key Biscayne.	20%
Project Manager	Joseph St. Germain	Coordinate all survey research activities including questionnaire programming, managing the data collection effort, analysis and report preparation.	20%
Assistant Project Manager	Rachael Powell	Assist in data collection, analysis, and report preparation.	15%
Interviewer Manager	Paul Wotherspoon	Supervise all interviewing activity.	10%
Associate Project Director	Roger Formisano	Assist Principal Investigator, as necessary.	2%
Interviewer Supervisors	7 supervisors	Train, schedule, manage, and encourage interviewers. Validate interviews.	12%
Interviewers	45 Interviewers	Conduct telephone interviews.	15%

## References

### *City of Miami Beach Resident and Business Survey*

**Contact: Leslie Rosenfeld, Ph.D.**, Chief Learning and Development Officer  
[LeslieRosenfeld@miamibeachfl.gov](mailto:LeslieRosenfeld@miamibeachfl.gov), 305.673.7010

Telephone survey of residents and businesses within city limits. Survey of 1,900 residents and 900 businesses via random-digit-dialing to determine resident opinions on quality of life in the city and satisfaction with city services and city customer service. *Project Director: Phillip E. Downs, Ph.D., Project Manager: Joseph St. Germain, Ph.D.*

### *City of Plantation*

**Contact: Kristi Caravella, Ph.D.**, Finance Director  
[kcaravella@plantation.org](mailto:kcaravella@plantation.org), 954.797.2233

While Dr. Caravella was Assistant Town Manager at Davie, we conducted telephone survey of residents and businesses to gauge the effectiveness Town government. *Project Director: Phillip E. Downs, Ph.D., Project Manager: Joseph St. Germain, Ph.D.*

### *Altamonte Springs Resident Survey*

**Contact: Rochelle Croskey**, Director, CRA & Special Projects  
[RCroskey@Altamonte.org](mailto:RCroskey@Altamonte.org), 407.571.8178

Telephone survey of residents within the City limits. Survey of 634 residents via random-digit-dialing to determine resident opinions on quality of life in Altamonte Springs and satisfaction with City services and customer service. *Project Director: Phillip E. Downs, Ph.D., Project Manager: Joseph St. Germain, Ph.D.*

### *Southwest Florida Water Management District (SWFWMD)*

**Contact: Robyn Felix**, Communications Manager  
[Robyn.Felix@swfwmd.state.fl.us](mailto:Robyn.Felix@swfwmd.state.fl.us), 352.796.7211 x4770

Customer satisfaction, branding and advertising effectiveness telephone surveys and focus groups. *Project Director: Phillip E. Downs, Ph.D., Project Manager: Joseph St. Germain, Ph.D.*

### *Tampa Bay Water Public Opinion Survey*

**Contact: Michelle Biddle-Rapp**  
[mrapp@tampabaywater.org](mailto:mrapp@tampabaywater.org), 727.791.2305

Telephone survey encompassing three counties. Survey of over 1,200 residents via random-digit-dialing to determine public attitudes about regional water supply issues including Tampa Bay Water initiatives, water quality, and conservation. *Project Director: Phillip E. Downs, Ph.D., Project Manager: Joseph St. Germain, Ph.D.*

### *Hazards Management (for coastal counties and municipalities from Texas to New York)*

**Contact: Jay Baker**  
[hazgroup@comcast.net](mailto:hazgroup@comcast.net), 850.893.8993

Conducted 40,000 telephone surveys over the last three years in order to determine hurricane preparedness among the general population living in coastal cities and counties from Texas to New York. *Project Director: Phillip E. Downs, Ph.D., Project Managers: Joseph St. Germain, Ph.D. and Sonia Prusaitis*

## Insurance

Kerr & Downs Research, if selected, shall secure and maintain throughout of the duration the project insurance of such types and amounts specified in the RFP, naming the Village of Key Biscayne as an additional insured.

## Financial Information

### Kerr & Downs Research Balance Sheet – 9.31.2014

#### ASSETS

##### Fixed Assets

Equipment	\$ 93,000	
Client list	\$200,000	
Building	\$525,000	
Total fixed assets		\$823,000

##### Current Assets

Accounts receivable	\$73,500	
Bank accounts	\$54,000	
Total current assets		\$127,500

**Total assets** **\$950,500**

#### LIABILITIES

##### Long-term liabilities

None \$ 0

##### Current liabilities

Payroll – 2 months	\$43,500	
Accounts payable	\$23,500	
Credit line balance	\$ 2,500	
<b>Total liabilities</b>		<b>\$ 69,500</b>

**Total assets less total liabilities** **\$881,000**

Kerr & Downs Research was founded in 1983 and has never experienced any type of credit or financial issues. Our current banking partner is Hancock Bank, Ken Stafford, City President, [James.Stafford@HancockBank.com](mailto:James.Stafford@HancockBank.com), 850.325.3150 or 850.728.8515. Our accountant is Frank Dorsey, CPA, [fedorsey@msn.com](mailto:fedorsey@msn.com), 850.222.0459.

## Appendices and Proof of Authorization

Appendix A includes resumes of Kerr & Downs Research Staff. Appendix B includes the completed Appendices from the RFP and Proof of Authorization to transact business in the State of Florida.

## Appendix A: Resumes

### Phillip E. Downs, Ph.D.

#### *Education*

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- Ph.D. - University of North Carolina, Chapel Hill, 1976
- M.B.A. - Bowling Green State University, 1972
- B.S. - Bowling Green State University, 1970

#### *Consulting Experience*

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- Kerr & Downs Research
  - 1984 – Present
  - Founding partner
  - Project Director for over 1,000 research projects
  - Moderated over 700 focus group interviews

#### *Professional & Academic Presentations*

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- 1975-present - 50 presentations at the American Marketing Association, Southern Marketing Association, Academy of Marketing Science, Southeastern American Institute of Decision Sciences, National Operations Research Society of America/The Institute of Decision Sciences, Mid-South Marketing Educators' Conference, American Society of Association Executives, American Association of Public Opinion Research, Journal of Public Policy & Marketing

#### *Academic Experience*

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- 1985-present - Professor of Marketing, Florida State University
- Associate Professor of Marketing, Florida State University
- Assistant Professor of Marketing, Florida State University
- Assistant Professor of Business Administration, College of William and Mary

#### *Honors and Awards*

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- American Marketing Doctoral Consortium Fellow
- Southern Marketing Association - Steven J. Shaw Award - Best Paper Award
- Southern Marketing Association - Best paper in the marketing research track
- Tallahassee Society of Association Executives - President's Award
- Tallahassee Society of Association Executives - Associate of the Year
- Florida State University - Outstanding Teaching Award
- American Marketing Association - FSU Chapter, Outstanding Marketing Teaching Award
- American Society of Association Executives, Marketing Section Council Member
- Florida Society of Association Executives, Associate Member of the Year

#### *Publications*

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- 35 articles in The Marketing Forum, Journal of the Academy of Marketing Science, Journal of Public Policy & Marketing, Handbook of Business Planning and Budgeting, Journal of Business Research, Developments in Marketing Science Volume II, Journal of the Market Research Society, Marketing Management: Strategies and Cases, Developments in Marketing Science, Volume I, Contemporary Marketing Thought, and Proceedings from the American Marketing Association, Southern Marketing Association, Academy of Marketing Science, and the Southeastern American Institute for Decision Sciences

## Roger Formisano, Ph.D.

### Education

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- Ph.D. – **University of North Carolina-Chapel Hill**
- M.A. – **University of New Hampshire**
- B.A. – **University of New Hampshire**

### Professional Experience

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- **Kerr & Downs Research**  
*Associate Partner* (2001 – Present)  
Strategic planning  
Present research results and recommendations  
Prepare and submit proposals
- **Formisano & Company**  
*Founder and principal* (2001 – Present)  
Strategic business consulting with an emphasis on strategy articulation and execution, leadership development, and M&A advisory services. The firm has served clients from various industries, and wide ranging size differences.
- **University of Wisconsin Medical Foundation**  
*Vice President of Leadership Development and Strategy* (part-time 2001 – present)  
University of Wisconsin Medical Foundation is the functional organization for 1,050 physicians practicing at UW Health sites.
- **Visiting Professorships**  
Dr. Formisano currently serves as a Visiting Professor on the business school faculty at HEC in Paris, and ISTCE in Lisbon; where in both cases he teaches Entrepreneurship and Strategy in the MBA program. He also currently teaches the Mergers and Acquisitions course in the eMBA program at UW-Madison.
- **United Wisconsin Services**  
*Executive Vice President and Chief Operating Officer* (1992 -1999)  
Formisano served as Executive Vice President and Chief Operating Officer for United Wisconsin Services, a multi-line, publicly traded insurance company headquartered in Milwaukee, Wisconsin. Formisano served United Wisconsin for seven years and had full responsibility for business units totaling \$500 million in revenue with over 600 employees. Formisano served as President of Compcare, one of the state's largest HMOs and Meridian Resource Corporation, a consulting firm he founded as a subsidiary in Madison, Wisconsin.

### Corporate Boards & Awards

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- Integrity Mutual Insurance Company (1986-Present)
- Audit Committee Chair (2001-Present)
- Wisconsin Sports Development Foundation (2006-present)
- Badger State Games (1999-2001)
- Wisconsin Sports Authority (1990-1999)
- Greater Milwaukee Open PGA Tournament (1997-2005)
- Wilshire Mutual Funds (2001-Present)
- Audit Committee Chair (2001-Present)

## Joseph St. Germain, Ph.D.

### *Education*

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#### **Florida State University**

Ph.D. in Educational Psychology with a Sport Psychology major

M.S. in Educational Psychology with a Sport Psychology major

Received the College of Education Teaching Fellowship (2002-2003)

Certificate in Measurement and Statistics

#### **University of Minnesota – Duluth**

B.A.S. in psychology, Minor in coaching

Graduated cum laude and with departmental honors

### *Professional Experience*

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#### **Kerr & Downs Research**

##### *Vice President*

- Manage market research projects for local, state, and national clients
- Design research methodologies customized to client's needs
- Conduct research via telephone, mail, web surveys, in-depth interviews, and focus groups
- Analyze qualitative and quantitative data
- Develop strategic recommendations to guide client's future marketing and business decision
- Prepare reports of research results
- Present research results and recommendations
- Prepare and submit proposals

#### **Florida State University**

##### *Academic Advisor*

- Provided academic advising to students in the College of Human Sciences
- Chair of the Social/Teambuilding Committee
- Chair of the Policy Committee
- Served on the Peer Mentoring Committee
- Leader of a Peer Mentoring Group
- Presenter at NACADA Region IV Conference: March 2006
- Aided in planning and coordinating of the 2007 NACADA Conference
- Workshop facilitator for Orientation Workshop: April 2006 & 2007
- Conducted Preview and Orientation presentations
- Performed student outreach activities

##### *Graduate Assistant-- Academic Advisor*

- Advised students
- Created First Year Experience (FYE) presentation
- Conducted Orientation presentations

## Rachael Powell

### Education

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University of Georgia, Athens, Georgia  
Bachelor of Arts, Public Relations, Magna Cum Laude  
Minor, Sociology

### Professional Experience

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#### **Project Director**, May 2014 – Present

Kerr & Downs Research, Tallahassee, FL

- Assist in the development of questionnaires, surveys, analysis and reports.
- Conduct in-depth data analyses using traditional and advanced methods.
- Co-author reports containing actionable recommendations.

#### **Public Relations Intern**, January 2014- May 2014

Pure Barre, Athens, GA

- Develop, implement and evaluate a campaign to increase members, retention rates and sales
- Oversee research, goals and objectives, logistics and graphics teams
- Create and manage a system to accurately keep track of hours worked on the campaign

#### **Public Relations Assistant**, June 2013- April 2014

QuackerSmackers.com, Athens, GA

- Write and distribute press releases
- Create a proposal to obtain sponsors for the website
- Generate surveys to gain insight from the target market
- Attend tradeshows and other events to promote the website

#### **Marketing Assistant & Proofing and Production**, May 2013- August 2013

Campus Special, Duluth, GA

- Assist business owners with creating deals/offers and with designing advertisements to achieve optimal return
- Manage production of coupon books for over 20 colleges/universities
- Manage business contracts, payments and other administrative work for over 60 sales representatives
- Meet strict deadlines for production

#### **Director of Public Relations**, September 2012- December 2012

Four Athens, Athens, GA

- Write and submit press releases and media alerts
- Create and maintain a “Founders’ Fridays” blog for the Four Athens webpage
- Assist in planning and executing Four Athens events

### Highlights

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Proficiency in InDesign CS6, Photoshop CS6, SPSS predictive analytics software and Google Analytics

## Carmen Hiers

Latin American Business Advisor  
Kerr & Downs Research

President & Owner  
The Solmar Group Inc.

### Education

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B.S. Florida State University, 1985  
Major: Communications  
Languages: Fluent in Spanish (native language)

### Corporate Experience

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#### Univision

##### Media Relations Manager

- Handled all media relations and communications strategies for the leading Spanish-language television network in the United States

#### Discovery Networks Latin America/Iberia

##### Director, International Public Relations

- Member of Senior Executive Team, responsible for all areas of communications, educational and community relations, content publicity, crisis management and internal communications

#### The Solmar Group

- Clients include:

MasterCard International	Polaroid
Microsoft	Levitz Furniture Corporation
Benetton	The Miami Herald
- Services include:

Corporate writing	Presentations
Translation	Speech writing
Communications	Ghost writing
Strategic planning	Book writing
Marketing	Manuals
Advertising	

#### Kerr & Downs Research

##### Latin American Business Advisor

- Responsibilities include:
  - Translating
  - Focus group moderating
  - Interpreting
  - Report preparation
  - Presentations

## **Appendix B: Completed Appendices from the RFP and Proof of Authorization**

The completed Appendices from the RFP and Proof of Authorization to transact business in the State of Florida are included on the following pages.

**APPENDIX "A"**

**ACKNOWLEDGEMENT, WARRANTY AND ACCEPTANCE**

A. Consultant warrants that it is willing and able to comply with all applicable State of Florida laws, rules and regulations.

B. Consultant warrants that they have read, understand and are willing to comply with all of the requirements of the RFP and the addendum/ addenda nos.

C. Consultant warrants that it will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the Council.

D. Consultant warrants that all information provided by it in connection with this Proposal is true and accurate.

**E. CONTINGENCY FEE AND CODE OF ETHICS WARRANTY:**

Consultant warrants that neither it, nor any principal, employee, agent, representative or family member has promised to pay, and Consultant has not, and will not; pay a fee the amount of which is contingent upon the Village of Key Biscayne awarding this contract. Consultant warrants that neither it, nor any principal, employee, agent, representative has procured, or attempted to procure, this contract in violation of any of the provisions of the Miami-Dade County conflict of interest and code of ethics ordinances. Further, Consultant acknowledges that a violation of this warranty will result in the termination of the contract and forfeiture of funds paid, or to be paid, to the Consultant, if the Consultant is chosen for performance of the contract.

Signature of Official:  \_\_\_\_\_

Name (typed): Joseph St. Germain

Title: Vice President

Consultant: Kerr + Downs Research

Date: 10/14/14

**APPENDIX "B"**

**NON-COLLUSIVE AFFIDAVIT**

State of Florida

SS:

County of Leon

Joseph St. Germain being first duly sworn, deposes and says

that:

(1) He/she is the, (Owner, Partner, Officer, Representative or Agent) of:

Kerr + Downs Research the Consultant that has submitted the attached Proposal;

(2) He/she is fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;

(3) Such Proposal is genuine and is not a collusive or a sham Proposal;

(4) Neither the said Consultant nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other Consultant or person to submit a collusive or sham response in connection with the work for which the attached Proposal has been submitted, or to refrain from responding in connection with such work, or have in any manner, directly or indirectly, sought by agreement or collusion, communication, or conference with any Consultant or person to fix this Proposal or to secure through any collusion, conspiracy, connivance, or unlawful agreement, any advantage against the Village, or any person interested in the proposed Work;

Signed, sealed and delivered  
In the presence of

\_\_\_\_\_  
\_\_\_\_\_

By: JS  
Joseph St. Germain  
(Printed Name)  
Vice President  
(Title)

**ACKNOWLEDGMENT**

State of Florida

County of Leon

On this 15 day of October, 2014, before me, the undersigned

Notary Public of the State of Florida personally appeared

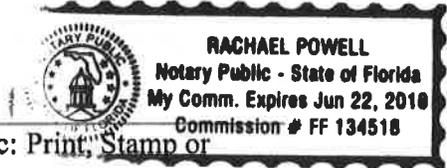
\_\_\_\_\_

and whose name(s) is/are subscribed to the within instrument, and he/she/they acknowledge that he/she/they executed it.

WITNESS my hand  
and official seal

Rachael Powell  
NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC  
SEAL OF OFFICE:



(Name of Notary Public: Print, Stamp or  
Type as commissioned.)

- Personally known to me, or
- Produced identification:

\_\_\_\_\_  
(Type of Identification Produced)  
 Did take an oath. or  
 Did not take an oath.

**APPENDIX "C"**

**SWORN STATEMENT PURSUANT TO  
SECTION 287.133 (3)(a) FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to the VILLAGE OF KEY BISCAWAYNE, FLORIDA

By Joseph Stobermain

For Kerr + Downs Research

Whose business address is: 2992 Habersham Dr, Tallahassee, FL 32309

And (if applicable) its Federal Employer Identification Number (FEIN) is: 90-0606283

(if the entity has no FEIN, include the Social Security Number of the individual signing this

Sworn statement - S.S. # \_\_\_\_\_ )

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with any agency or political subdivision of any other State or of the United States, including, but not limited to, any Proposal or contract for goods or services to be provided to any public entity or an agency or any political subdivision of any other state or of the United States and involving antitrust fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non jury trial, or entry of a plea of guilty or no contest.
4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, and means:
  - A. A predecessor or successor of a person convicted of a public entity crime; or
  - B. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate.

The ownership by one person of shares constituting a controlling Interest in another person, ore pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws or any state or of the United States with the legal power to enter into a binding contract and which Proposals or applies to Proposal on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of any entity.

Signed, sealed and delivered

In the presence:

---

By:



Joseph St. Germain  

---

(Printed Name)

Vice President  

---

(Title)

**ACKNOWLEDGMENT**

State of Florida

County of Leon

On this 15<sup>th</sup> day of, 2014, before me, the undersigned Notary Public of the State of Florida personally appeared \_\_\_\_\_ and whose name(s) is/are subscribed to the within instrument, and he/she/they acknowledge that he/she/they executed it.

WITNESS my hand and official seal

Rachael Powell  
NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC  
SEAL OF OFFICE:



(Name of Notary Public: Print, Stamp or Type as commissioned.)  
 Personally known to me, or  
 Produced identification:

\_\_\_\_\_  
(Type of Identification Produced)  
 Did take an oath. or  
 Did not take an oath.

# *State of Florida*

## *Department of State*

I certify from the records of this office that KERR & DOWNS RESEARCH, LLC, is a limited liability company organized under the laws of the State of Florida, filed on May 11, 2010, effective May 14, 2010.

The document number of this company is L10000050349.

I further certify that said company has paid all fees due this office through December 31, 2014, that its most recent annual report was filed on January 8, 2014, and its status is active.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Fifteenth day of October, 2014*



*Ken Detjmer*  
**Secretary of State**

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# **Response to Village of Key Biscayne RFP 2014-1 for Public Opinion/Needs Assessment Surveying Services**

**Submitted to**



## **The Village of Key Biscayne, FL**

**Submitted by:**



**725 W. Frontier Circle**

**Olathe, KS 66061**

**(913) 829-1215**

**October 2014**

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**Section 1**  
***Letter of Intent***

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# Leisure Vision

a division of ETC Institute

*Assisting Organizations & Communities in Making Better Decisions*

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October 9th, 2014

Ms. Conchita H. Alvarez, MMC  
Village Clerk  
88 West McIntyre Street, Suite 220  
Key Biscayne, Florida 33149  
Phone: 305-365-5506

Dear Ms. Alvarez:

*Leisure Vision (a division of ETC Institute) is pleased to present the attached scope of services and fees to work with the Village of Key Biscayne on a Public Opinion/Needs Assessment Surveying Services. .*

*Leisure Vision has conducted more than 600 public opinion and needs assessment surveys in 48 states* “to help communities and agencies make better decisions.” Some of the communities across the County, including Florida we have worked with include:

- Atlanta, Georgia
- Bend, Oregon
- Bloomingdale, Illinois
- Buffalo Grove, Illinois
- Clark County (Las Vegas), Nevada
- Denver, Colorado
- East Baton Rouge, Louisiana
- Fairfax County, Virginia
- **Fort Lauderdale, Florida**
- Fox Valley Special Rec. Association
- Henderson, Nevada
- Hoffman Estates, Illinois
- **Key Biscayne, Florida**
- Los Angeles, California
- Mecklenburg County, NC
- Mesa, Arizona
- **Miami, Florida**
- **Miami-Dade County, Florida**
- Monmouth County, New Jersey
- Oakland County, Michigan
- Oklahoma City, Oklahoma
- **Orlando, Florida**
- **Pinellas County, Florida**
- Peoria, Arizona
- Prince Georges County, Maryland
- Prince William County, Virginia
- Provo, Utah
- Raleigh, North Carolina
- San Diego, California
- San Francisco, California
- Somerset County, New Jersey
- St. Paul, Minnesota
- Tempe, Arizona
- Tucson, Arizona

# Leisure Vision

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*Assisting Organizations & Communities in Making Better Decisions*

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## **Implementation of Survey Findings**

Leisure Vision market research surveys have assisted communities win more than \$2.5 billion in voter approved projects. In partnership with clients, we seamlessly integrate citizen survey research with City and Village operations, capital planning, management and financing decisions. We have found that the best survey projects have the best clients. We have been fortunate to have worked with over 35 Gold Medal Award Winning Park systems, and more than 20 Accredited Agencies. Leisure Vision is used to working with the best of the best.

## **Leisure Vision Resources**

We conduct mail, phone, mail/phone, and web surveys, all with in-house staff. We have developed numerous special analysis tools, such as GIS coding and mapping of surveys, importance/unmet needs matrixes, performances measurements, etc. to assist in the survey and implementation process. Our goal with each survey and project effort is to assist organizations and communities in making better decisions, by providing highly accurate market research information and tools for performance measurement, supported by unparalleled strategic analysis of the survey results.

## **National Benchmarking**

Leisure Vision has an unparalleled database of more than 70,000 survey responses from parks and recreation open space plans, strategic plans, and other planning efforts from communities across the country and in Florida. This information provides our clients extremely valuable comparative analysis of their citizen's attitudes and priorities with those of other communities.

*I will serve as the project manager for your assignment.* My experience includes more than 600 needs assessment projects across the country, including all of the major projects and references in our proposal. I hold a master's degree in Parks and Recreation Administration from the University of Illinois.

*We are very interested in working with the Village of Key Biscayne on your Public Opinion/Needs Assessment Surveying Services.* If you have any follow-up questions regarding our proposal, please do not hesitate to contact me at 913-829-1215 or at [Rvine@ectinstitute.com](mailto:Rvine@ectinstitute.com).

Sincerely,



Ronald A. Vine, Senior Vice-President

**Section 2**  
***Scope of Services***

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## **Scope of Services for Statistically Valid Survey**

In order to accomplish the objectives for this project, Leisure Vision will conduct the following tasks.

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

**Task 1.1: On Site Meeting for Survey Initiation and Design.** Ron Vine will meet on-site for one (1) day and evening with Village officials to discuss survey issues. As part of the visit Ron will hold two (2) focus groups with members of the public living in Key Biscayne, to ensure their early involvement in the survey process and to build trust and buy-in.

Following the on-site meeting, Leisure Vision will continue to work in partnership with Village of Key Biscayne officials 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 Village of Key Biscayne 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 1.2: Design Sampling Plan.** Leisure Vision will prepare a sampling plan that will ensure the completion of at least **500 surveys of resident households in Village of Key Biscayne.** The overall results for 500 completed surveys will have a precision of at least +/-4.4% at the 95% level of confidence.

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

**Task 1.4: Conduct Pilot Test.** Once the draft survey is developed Leisure Vision 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 Village and corrective action will be recommended and taken as appropriate.

### **Task 2: Administering the Survey Instrument and Analysis**

**Task 2.2: Mailing of Surveys.** Leisure Vision will design the sample so that a mail survey is first sent out by mail to a random sampling of over 2,500 residents of Village of Key Biscayne, including a metered return envelope to Leisure Vision/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 2.1: Web Survey.** Leisure Vision 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.** Leisure Vision 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 Leisure Vision 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, Leisure Vision 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) and Trends** Leisure Vision maintains national and regional benchmarking data from citizen surveys for more than 400 park systems across the country. Comparisons will be made for the Village of Key Biscayne survey with other national providers, similar size communities, and in comparison to the previous survey results.

Leisure Vision will additionally benchmark the results to previous needs assessment surveys for trending and strategic decision-making purposes.

- **Task 2.6-B. Importance-Unmet Needs Priorities Analysis (Optional).** 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 (Optional).** Leisure Vision will prepare maps that show the results of specific questions on the survey.

### **Task 3: Final Report and Presentation**

**Task 3.1 Development of Final Report.** Leisure Vision 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 Village of Key Biscayne
- results of the analysis tools including the I-U Analysis and Benchmarking Analysis
- copy of the survey instrument.
- a copy of the database in SPSS or Microsoft Excel

**Task 3.2: Survey Presentation.** Leisure Vision will make a presentation of findings of the survey results to Village 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.

### **Month 1**

- Kick-off phone discussion to discuss survey goals & objectives and dates for site visit
- Leisure Vision provides Village examples of surveys for review
- Sampling plan finalized
- On-site visit
- Leisure Vision provides the Village with a draft needs assessment survey
- Village provides cover letter
- Village staff review the content of the draft needs assessment survey and provide feedback to Leisure Vision
- Leisure Vision revises the needs assessment survey based on input from staff
- Village approves the needs assessment survey instrument for testing
- Pilot test conducted
- Survey modified if needed and approved for printing

### **Month 2**

- 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 Village
- Discussion held on draft report

### **Month 3**

- Data collection is completed for needs assessment survey
- Discuss changes to draft report
- Final Report delivered
- On site visit to conduct formal presentations and workshop

## **Responsibilities of the Parties**

### **Leisure Vision Responsibilities**

*Leisure Vision's cost proposal includes the following services:*

- designing the survey in association with the Village of Key Biscayne
- requesting background information
- finalizing the methodology for administering the survey
- selecting a random sample of households for the Village
- 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 of 500 surveys
- cross tabular analysis of survey results
- national benchmarking comparisons
- geocoding of results (optional)
- importance/satisfaction analysis (optional)
- 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
- 1 adobe copy and 6 hard copies of the final report
- 1 day on-site for project kick-off meetings and focus groups
- 1 day on-site to present findings

### **Village of Key Biscayne Responsibilities**

- provide pertinent background materials
- identify central issues to be addressed in the survey
- approve the survey instrument
- provide an electronic map of the Village 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 sub analysis of the data as appropriate
- arrange for locations and set-ups of presentations

**Section 3**  
***Firm Qualifications***

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## ***LEISURE VISION***

### ***Overview***

Leisure Vision (a division of ETC Institute) specializes in the design and administration of

market research for parks, open space, trails, and recreation organizations. Leisure Vision has designed and administered more than 600 statistically valid parks and recreation surveys in 47 states, including more than 300 surveys as components of master plans and strategic plans and feasible studies; and our team of professional researchers has moderated more than 1000 focus groups and 300 stakeholder meetings.



Leisure Vision is a fully owned division of ETC Institute, an 86 person firm that specializes in the design and administration of a full range of local, state and federal agency market research.

**Leisure Vision has administered more parks, open space, trails and recreation surveys for large county, city, and state organizations than any other market research firm. Some of the communities we have worked in include:**

- Atlanta, Georgia
- Bloomingdale, Illinois
- Buffalo Grove, Illinois
- Carol Stream, Illinois
- Champaign, Illinois
- Clark County (Las Vegas), Nevada
- Deerfield, Illinois
- DeKalb County, Georgia
- Denver, Colorado
- Des Plaines, Illinois
- East Baton Rouge, Louisiana
- Fairfax County, Virginia
- **Fort Lauderdale, Florida**
- Fulton County, Georgia
- Henderson, Nevada
- Hoffman Estates, Illinois
- Kansas City, Missouri
- Los Angeles, California
- Maricopa County, Arizona
- Mecklenburg County, NC
- Mesa, Arizona
- **Miami, Florida**
- **Miami-Dade County, Florida**
- Monmouth County, New Jersey
- Norfolk, Virginia
- Oakland County, Michigan
- Oklahoma City, Oklahoma
- **Orlando, Florida**
- **Pinellas County, Florida**
- Prince Georges County, Maryland
- Prince William County, Virginia
- Provo, Utah
- Raleigh, North Carolina
- San Diego, California
- San Francisco, California
- St. Paul, Minnesota
- St. Louis County, Missouri
- Tucson, Arizona
- Urbana, Illinois
- Westchester County, New York
- Wheeling, Illinois
- Woodridge, Illinois



## **Our Research is Implementation Oriented:**

Leisure Vision's clients do not usually hire Leisure Vision just to gather data. They use our services because they know we are focused on helping them achieve their short and long range objectives. A good measurement of our ability to help our clients implement their goals and objectives involves the values of new projects that have been funded as a result of our work. **As an example, the results of our market research have led to more than \$2.5 billion in voter approved parks, open space, trails, and recreation tax elections.** Our ability to help our clients integrate survey research with community planning decisions helps our clients maximize the value of their investment in our services.

## **Residents See "Their Own Vision" in Our Market Research**

Leisure Vision works in partnership with staffs and officials of County, City, State, and Federal governmental clients in designing and administering statistically valid surveys that allow residents to see "their own vision" in future recommendations. The trust and buy-in developed by citizens through our transparent and experienced process allows for survey findings to be implemented and completed.

## **Our Research Helps Community Leaders Balance the Needs of the General Public with Special Interest Groups.**

Special interest groups often dominate local-decision making processes because they actively participate in community meetings and share their ideas with local officials. While input from special interest groups is important, the needs of the general public can be overlooked if community leaders only have input from well organized groups and community activists. Leisure Vision's surveys are designed to ensure the needs of the entire community are represented.

## **Our Research Ensures Representation for Non-English Speaking Populations**

Leisure Vision and our parent company ETC Institute understand the importance of gaining survey input from Non-English speaking residents. Leisure Vision has designed and administered surveys in some of the nation's most diverse communities with in-house staff including: San Bernardino County (California), Los Angeles (CA); Miami-Dade County (Florida), San Francisco (CA); San Antonio (Texas), Yuma County (Arizona), Long Beach (California). More than one-third of the residents in several of these communities were foreign-born. We will guarantee that the results of the survey are statistically representative of your community.

## Market Research Services Provided

Leisure Vision provides a host of market research services including the following:

### **Focus Groups and Stakeholder Interviews**

Leisure Vision has facilitated focus groups and stakeholder interviews for organizations across the United States. Focus groups have been conducted for a wide range of assessments, public policy initiatives, strategic and long range planning efforts, visioning plans, comprehensive planning efforts, parks and recreation master plans, transportation plans, health care strategic plans, bi-state planning efforts, customer satisfaction initiatives, and numerous state, regional, and national associations.

### **Survey Research**

Leisure Vision is nationally recognized for our expertise in survey research. We have been helping non-profit and local governmental organizations use surveys as a guiding force for setting measurable community level goals and priorities for more than two decades. Leisure Vision has designed and administered market research assessments on behalf of clients in 47 states

### **On-Line (Web-based) Market Research**

Leisure Vision can help organizations gather input via the Internet with our on-line market research division. Internet-based surveys are suitable for a wide range of purposes including: customer satisfaction surveys, employee surveys, business surveys, and other purposes.

### **Consensus Building Workshops**

At the end of a project, Leisure Vision can facilitate workshops with senior managers and/or elected officials. The workshop is designed to build consensus around “top priorities” for the City, based on the results of the survey. The workshop helps set the stage for acceptance of the recommendations as well as action that will lead to the implementation of initiatives that will support the recommendations.

### **Surveys of Underserved/Environmental Justice Groups**

Leisure Vision and our parent company ETC Institute understand the importance of gathering data from traditionally underserved populations. During the past two years, Leisure Vision has administered more than 75,000 surveys to traditionally underserved populations. Our extensive experience in the recruitment of traditionally underserved populations to participate in surveys ensures that our clients get accurate data for a wide range of difficult to reach populations **including non-English speaking persons**, persons with mental and physical disabilities, inner city and rural poor, and the elderly. Leisure Vision has the capability of administering surveys in more than 20 languages, including: English, Spanish, Russian, Mandarin, and Cantonese.

## Internal Capacity and Resources

Unlike many firms who outsource data collection activities, Leisure Vision has in-house capabilities for performing all data collection tasks. This provides our clients with two advantages. First, we are able to directly control the scheduling of all research activities to ensure that all surveys are completed on time.

Second, our senior research professionals are able to directly monitor the administration of the survey, which allows our team to understand anomalies in the data collection process which could later compromise the analysis and interpretation of the data.

Leisure Vision's in-house resources will allow the project team to monitor all phases of the survey administration process, which will ensure that the highest standards of quality are maintained. In-house services include:

**Mail Center.** Our Pitney Bowes mail processing and postage metering system is capable of processing up to 30,000 pieces of mail per day, including surveys, postcard reminders, thank you letters, and other information sent to survey participants. We maintain a return-reply permit with the U.S. Post Office, which allows us to provide survey respondents with postage-paid return envelopes.

**Call Center.** Research efforts to date range in size from several hundred surveys to more than 15,000 surveys. Since 1998, Leisure Vision has surveyed more than 1 million residents on behalf of 300 cities and counties in more than 48 states. Leisure Vision's market research accuracy and attention to client needs is unparalleled. The new call center is equipped with 40 interviewing stations that can easily be expanded to accommodate 100 interviewers. Daily survey administration capabilities include:

- 1,960 completed 5-minute surveys per day
- 1,430 completed 10-minute surveys per day
- 1,020 completed 15-minute surveys per day
- 780 completed 20-minute surveys per day

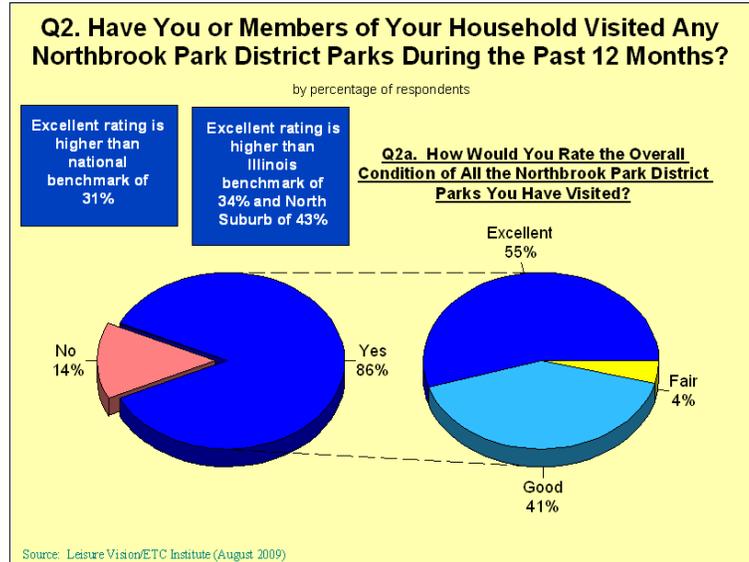
**Foreign Languages.** In-house foreign language translation and telephone recruitment services for more than 20 languages, including Spanish, Mandarin, Cantonese, and Russian.

**Quality Control.** Leisure Vision's quality control procedures for the administration of market research were recently reviewed and accepted by the U.S. Office of Management and Budget for our work with the National Park Service.

## Benchmarking Specific to Parks and Recreation Services

Leisure Vision has an unparalleled database of more than 70,000 survey responses BY CITIZENS from parks and recreation open space plans, strategic plans, and other planning efforts from communities across the country. This information provides our clients extremely valuable comparative analysis of their citizen’s attitudes and priorities with those of other communities.

**Benchmarking National Averages** have been developed for over 100 strategically important parks and recreation planning and management issues including: customer satisfaction and usage of parks and programs; methods for receiving marketing information; reasons that prevent members of households from using parks and recreation facilities more often; priority recreation programs, parks, facilities and trails to improve or develop; priority programming spaces to have in planned community centers and aquatic facilities; etc.



## **Gold Medal Award Winning Communities**

Leisure Vision has conducted surveys for over 35 Gold Medal Award Winning communities, since our founding in 1982. Gold Medal Award winning communities we have worked with in the past ten (10) years include:

- Hoffman Estates, Illinois
- Canton Leisure Services, Ohio
- City of Bloomington Parks and Recreation, Indiana
- Tempe Parks and Recreation, Arizona
- Bend Metro Park and Recreation District, Oregon
- Saint Paul Parks and Recreation, Minnesota
- Schaumburg Park District, Illinois
- Fairfax County Park Authority, Virginia
- Carol Stream Park District, Illinois
- City of Mesa Parks, Recreation, and Cultural Division, Arizona
- Springfield-Green County Park Board, Missouri
- City of Henderson Parks and Recreation

## **Accredited Agencies**

Leisure Vision has conducted surveys for over 20 of the 78 Accredited Agencies. Accredited Agencies we have conducted surveys for include:

- City of Tamarac Parks and Recreation Department, Florida
- City of Ormond Beach Leisure Services Department, Florida
- City of Atlanta Department of Parks, Recreation, and Cultural Affairs, Georgia
- City of Bloomington Parks and Recreation Department, Indiana
- City of Fort Wayne Parks and Recreation Department, Indiana
- Johnson County Park and Recreation District, Kansas
- City of Lenexa Park and Recreation District, Kansas
- Fort Knox Community Recreation Division, Kentucky
- BREC-The Recreation and Park District, Parish of East Baton Rouge, Louisiana
- Charter Township of Canton Leisure Services Department, Michigan
- City of Saint Paul, Minnesota
- Kansas City Parks and Recreation Board, Missouri
- City of Henderson Parks and Recreation Department, Nevada
- Monmouth County Park System, New Jersey
- Westchester County Department of Parks, Recreation and Conservation, New York
- City of Durham Parks and Recreation Department, North Carolina
- City of Kettering Parks, Recreation and Cultural Arts Department, Ohio
- Arlington County Department of Parks, Recreation and Cultural Affairs, Virginia
- Fairfax County Park Authority, Virginia

## Geocoding Experience and Capabilities

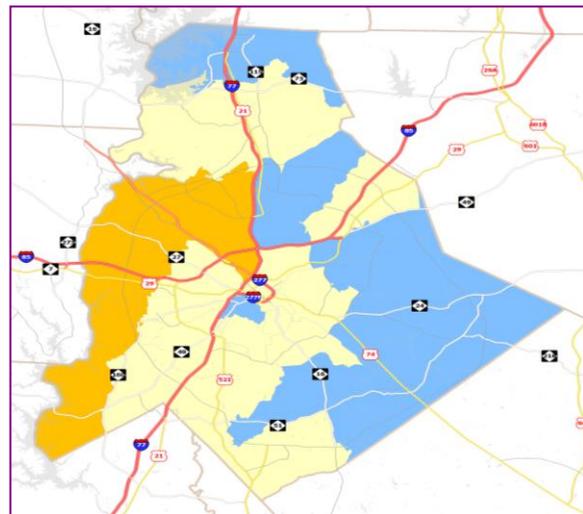
Leisure Vision staff has successfully geocoded survey results for more than 200 market research projects in the past three years.

Our GIS team will bring highly developed and current skills in automated information collection, data cleanup and manipulation, state-of-the-art geocoding, and database development to this assignment. Our planners and technicians routinely support parks and recreation planning, transportation, customer satisfaction, and other planning and modeling efforts around the country.

GIS maps not only provide our clients with a visual representation of the areas of the City or County that is but they also show areas where residents have the greatest and least amount of needs for various services.

For example the map below shows by color the percentage of respondents who indicate their needs for walking and biking trails is not being met by locations of households in Mecklenburg County, North Carolina. The color coding indicated under the legend indicate the percent of households in Mecklenburg County having a need for walking and biking trails that indicate their needs are being met. The survey results indicate unmet needs throughout the County with the greatest unmet needs in the western portions of the County. The findings from the statistically valid survey conducted in Mecklenburg County were used as a key component of a successful voter campaign to address the unmet needs for trails and a wide range of parks and recreation facilities in the County.

### Q10r Walking and biking trails





**NEEDS ASSESSMENT SURVEY (2013-2014)  
Miami-Dade County, Florida**

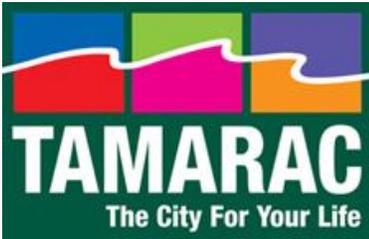
ETC Institute has worked with Miami-Dade County and the Florida Parks and Recreation Department on a County-wide parks and recreation needs assessment survey. The survey was amongst the largest local parks and recreation surveys ever conducted. There were over 8,000 surveys completed and statistically valid results obtained from 80 different sub-geographic areas in Miami-Dade County.

ETC Institute has co-facilitated a workshop with key department staff, and has completed development of the needs assessment survey. As part of the needs assessment process, ETC Institute is geocoding each survey so that the specific location of each returned survey can be used for mapping, and development of strategies focused on serving specific demographic groups as well as locations in the County. ETC Institute is also developing an electronic user friendly system that Miami-Dade County staff can use on an on-going basis for analyzing survey data.

Ron Vine has previously worked with Joe Webb on numerous parks and recreation surveys in large communities including Pinellas County, FL, Orlando, and San Diego.

Joe Webb, Planning Section Supervisor  
Planning and Research Division  
Miami-Dade County Parks, Recreation and Open Spaces Department  
305. 755.7831: [jwebb@miamidade.gov](mailto:jwebb@miamidade.gov)

**Needs Assessment Survey (2007, 2014)  
Tamarac, Florida**



Leisure Vision conducted a Community Attitude and Interest Survey for the City of Tamarac in the summer of 2007 to establish priorities for the future development of parks and recreation facilities, programs and services within the City and measure current usage and satisfaction with services.. The survey was designed to obtain statistically valid results from households throughout the city. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 400 completed surveys. This goal was accomplished, with a total of 407 surveys having been completed. The results of the random sample of 407 households have a 95% level of confidence with a precision of at least +/-4.9%.

Leisure Vision is currently working on a follow-up survey for the City of Tamarac

Greg Warner, Director  
Parks and Recreation Department  
6001 Nob Hill Rd, Tamarac, FL 33321  
954. 597.3620: [Greg.Warner@tamarac.org](mailto:Greg.Warner@tamarac.org)

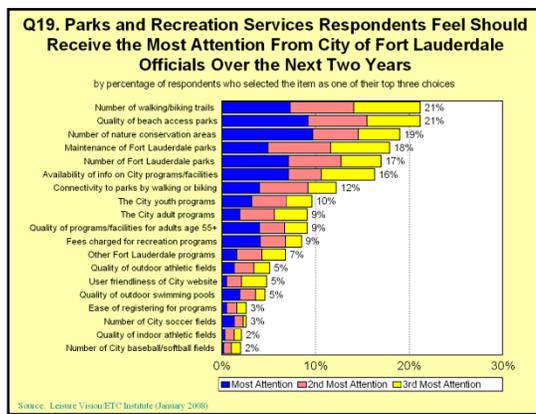
**PARKS AND RECREATION CITIZEN SURVEY (2007)  
City of Fort Lauderdale, Florida**



ETC Institute conducted a parks and recreation citizen survey as part of a comprehensive long range plan for this community of 200,000 residents. The survey was designed to obtain statistically valid results from households throughout the City of Fort Lauderdale. The survey was administered by a combination of mail and phone.

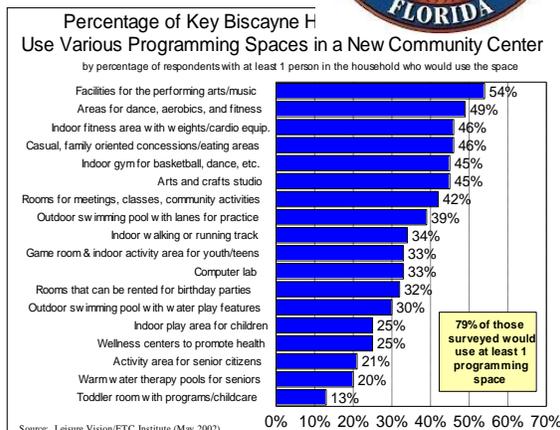
The goal was to obtain a total of at least 600 completed surveys. This goal was accomplished, with a total of 630 surveys completed. The results of the random sample of 630 households have a 95% level of confidence with a precision of at least +/-3.9%.

Phil Thornburg, Director  
 Administrative Office  
 1350 W. Broward Boulevard, Fort Lauderdale, FL 33312  
 954. 828.7275



### Needs Assessment Survey (2002) (2006) Key Biscayne, Florida

ETC Institute conducted this study to bring consensus to this Florida community regarding the priority importance of various outdoor and indoor programming spaces. Components of the study included stakeholder interviews, focus groups, an a statistically valid survey of 400 households. Questions on the survey related to issues involving the unmet need for various indoor and outdoor programming areas, the priority need for indoor and outdoor programming spaces, potential usage of a new indoor community center, fees, which would be paid to use the facility, and voter support.



*Results from the survey were used as a cornerstone of a successful voter election to build an indoor community center.* In 2006, ETC Institute conducted a 2<sup>nd</sup> survey for the City

Todd Hofferberth, Director  
 Parks and Recreation Department  
 88 West McIntyre Street, Key Biscayne, FL. 33149  
 305. 365.8900 ex 1213: [thofferberth@keybiscayne.fl.gov](mailto:thofferberth@keybiscayne.fl.gov)

**NEEDS ASSESSMENTS FOR PARKS AND RECREATION STRATEGIC PLAN (2002), SURVEY OF ADULTS OVER 50 YEARS (2006), NEEDS ASSESSMENTS FOR STRATEGIC PLANS 2006, 2010**

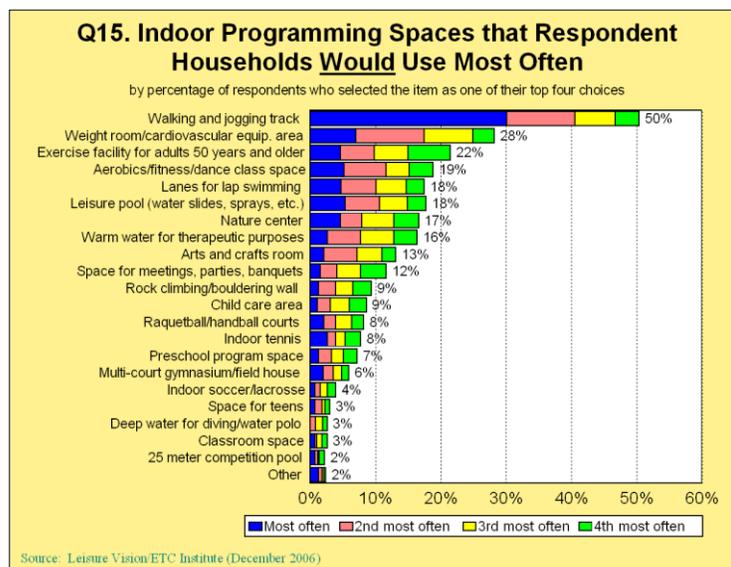


Leisure Vision has conducted four (4) statistically valid surveys for the City of Bloomington Parks and Recreation Department. Three of the surveys were conducted as components of Master Plans.

A statistically valid mail/phone needs assessment survey to 600 residents of the city and county was conducted for each of the surveys.

The 2001 survey identified walking and biking trails as the #1 priority of residents. Since then the City has developed a connecting trail system throughout a major portion of the community.

In the 2006 survey, the need for indoor programming spaces was identified as a high community priority. The chart to the right indicates which program spaces would be used the most often if developed in an indoor recreation center.



In 2009, the City developed a multipurpose indoor community center.

*“We have used ETC Institute/Leisure Vision for multiple Citizen and Interest Survey of our community’s parks and recreation priorities. The results from the surveys have been instrumental in helping us form our Department’s Long Range and Strategic Plans. Each of these surveys was created and administered with the assistance of Ron Vine. I have found Ron to be an excellent resource in drafting appropriate survey questions and interpreting and delivering the final survey results to our community stakeholders. Ron is extremely knowledgeable, professional and responsive. I would highly recommend him as a resource for initiating a community survey.”*

Mick Renneisen, Director

MICK RENNEISEN, Administrator  
 Parks and Recreation Department  
 410 N. Morton Street  
 Bloomington, Indiana 47402  
 (812) 349-3700



# Mecklenburg County Park and Recreation

*The Natural Place  
To Be...*

[www.parkandrec.com](http://www.parkandrec.com)

## NEEDS ASSESSMENT SURVEY FOR MASTER PLAN (2007, 2013)) Mecklenburg County, North Carolina

ETC Institute conducted a parks and recreation citizen survey during the winter of 2007-08 as part of a comprehensive long range plan for this County of over 800,000 residents. The survey was designed to obtain statistically valid results from households throughout Mecklenburg County to help establish priorities for the future of parks, greenways, trails, recreation facilities, wildlife habitats, programs and services within the County. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 1,000 completed surveys. This goal was accomplished, with a total of 1,033 surveys having been completed. The results of the random sample of 1,033 households have a 95% level of confidence with a precision of at least +/-3.0%.

Results from the survey were used as a cornerstone for successful voter election held in November of 2008, resulting in the passage of a \$250 million bond issue to fund parks and recreation facilities improvements and new projects.

*“We are flying high as you can imagine. We also passed a bond issue last fall for \$35 million for land acquisition. With this added to the \$250 million we can really take a huge step forward.*

*We would not have been successful if not for the master plan and your help. Without question the master plan and therefore the bond package reflected what the residents told us they wanted. Your work to get accurate information was critical to the entire process. Please pass along my thanks to all your team for their hard work. Please pass the word along to your clients. And feel free to quote me at any time.*

JIM GARGES, Director  
Mecklenburg County Park and Recreation Department  
5841 Brookshire Boulevard  
Charlotte, North Carolina 28216  
(704) 336-3854  
[James.Garges@mecklenburgcountync.gov](mailto:James.Garges@mecklenburgcountync.gov)



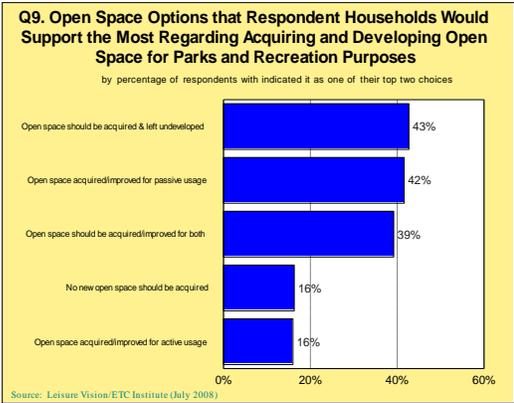
**References for Major Related Project Experience**

**COMMUNITY INTEREST AND OPINION NEEDS ASSESSMENT SURVEY (2006) (2007) and (2010); Oakland County Parks and Recreation Commission, Michigan**

Leisure Vision has conducted three Community Attitude and Interest Surveys for the Oakland County Parks and Recreation Commission. The first two surveys were conducted as components of parks and recreation strategic plans. The third survey was to understand issues impacting a successful voter election in 2010.

As an example, the survey in 2008 was conducted in to help establish priorities for the future of parks greenways, trails, wildlife habitats, recreation facilities, programs and services within the County. The survey was designed to obtain statistically valid results from households throughout Oakland County. The survey was completed in association with a parks and recreation strategic plan. The survey was administered by a combination of mail and phone.

The survey identified issues impacting service of the park system such as usage and satisfaction with current parks and facilities; most effective methods of marketing; the overall value of the park system; actions residents would be most supportive of funding with their tax dollar; and other issues.



Of particular importance to the Parks and Recreation Commission was to understand options that were most important to residents regarding acquiring and developing open space. Each respondent was allowed to select their two priority options. The chart to the right shows the results from this question.

*“Oakland County Parks and Recreation has found the research expertise of ETC Institute invaluable in regards to its ability to conduct informational stakeholder interviews, citizen needs assessments and surveys that have been instrumental in creating a successful millage campaign and for facilitating planning efforts.”*

DANIEL J. STENCIL, Executive Officer  
 Oakland County Parks and Recreation Commission  
 2800 Watkins Lake Road, Waterford, Michigan 48328  
 (248) 858-4944  
 stencild@oakgov.com





**PARKS AND RECREATION NEEDS ASSESSMENT STUDY (2008) (2011)**

**Park City, Utah**

Leisure Vision conducted a Community Attitude and Interest Survey to establish priorities for the future development of parks and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout Park City. The survey was administered by a combination of mail and phone.

Leisure Vision worked extensively with Park City officials in the development of the survey questionnaire. This work allowed the survey to be tailored to issues of strategic importance to effectively plan the future system.

Surveys were mailed to a random sample of 2,000 households in Park City. Approximately three days after the surveys were mailed, each household that received a survey also received an electronic voice message encouraging them to complete the survey. In addition, about two weeks after the surveys were mailed, Leisure Vision began contacting households by phone, either to encourage completion of the mailed survey or to administer the survey by phone.

The goal was to obtain a total of at least 400 completed surveys. This goal was accomplished, with a total of 439 surveys having been completed. The results of the random sample of 439 households have a 95% level of confidence with a precision of at least +/-4.7%.

*“Ron, I wanted you to know that our City Council has made the decision to fund a \$10.5 million renovation of the Racquet Club. The survey you conducted for us was a key component in getting the project approved. The data that identified the Racquet Club as the most used facility as well as the renovation as the most important improvement we could make helped the City Council with their decision.”*

Ken Fischer, Recreation Services Manager

KEN FISCHER, Recreation Services Manager  
Park City Municipal  
(435) 615-5411

## COMMUNITY INTEREST AND OPINION SURVEY (2012) Maryland-National Capital Park and Planning Commission



The Maryland-National Capital Park and Planning Commission conducted a Community interest and Opinions Survey in the spring of 2012. The purpose of the survey was to help establish priorities for the future development of parks and recreation facilities, programs and services within Prince George's County.

The goal was to obtain a total of at least 1,200 completed surveys. This goal was far exceeded with nearly 1,500 surveys having been completed. The survey was administered via mail and phone.

The Planning Commission was interested to see the results of how respondents would allocate an additional \$100 among certain categories of funding. The Maryland-National Capital Parks and Planning Commission discovered residents would allocate funding primarily towards the improvement or maintenance of existing parks (\$37). Other ways households would allocate funding included: development of new indoor facilities (\$26), the acquisition and development of walking and biking trails (\$15), acquisition of new park land and open space (\$12), construction of new sports fields (\$8), and "other" (\$2).

Among other findings the survey found that sixty-three percent (63%) of households indicated they would use a new indoor walking and jogging track if it were to be developed in Prince George's County. Additionally, other programming spaces that households would use include: aerobics/fitness/dance class space (57%), weight room/cardiovascular equipment area (51%), exercise facility for adults 50 years and older (47%), space for meetings, parties, banquets (43%), and leisure pool (water slides, sprays, etc.) (42%).

### JOHN HENDERSON

Research and Evaluation Manager

The Maryland-National Capital Park and Planning Commission

Department of Parks and Recreation

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Project Manager: Ron Vine



## NEEDS ASSESSMENT SURVEY (2013) Raleigh, North Carolina

ETC Institute conducted a Parks and Recreation Needs Assessment Survey on behalf of the City of Raleigh in January and February of 2013. The purpose of the survey was to help establish priorities for the future development and delivery of parks, trails, recreation facilities, programs and services with the community. The survey was designed to obtain statistically valid results from households throughout the City of Raleigh. The survey was administered by a combination of mail, phone, and online.

ETC Institute worked extensively with City of Raleigh officials, including conducting a ½ day workshop with key management staff for the City of Raleigh park system, as well members of the AECOM project team, in the development of the survey questionnaire. The goal was to obtain a total of at least 800 completed surveys. This goal was accomplished, with a total of 802 surveys having been completed. The level of confidence is 95% with a margin of error of +/-3.4%.

### Major Survey Findings Included:

- Of the 83% of households that visited City of Raleigh parks and trails in the past 12 months, significantly higher than the national benchmarking norm of 72%. Greenway trails were the most visited parks and trails.
- The major reasons for participating in programs were affordable fees and locations of program facility.
- Opportunities exist to increase participation in program areas important to respondent households. For example, 35% of household respondents indicated fitness and wellness programs were one of the top 4 most important programs to their household, but only 20% participated in these programs at parks and recreation facilities.
- Regarding facilities that should have the highest priority for development, thirty percent (30%) of households indicated that the highest priority should be placed on the development of greenway trails/connections closer to home. Other areas that were given highest priority were: more emphasis on the development of smaller “walk to” parks (27%), equal emphasis on the development of small and large parks (22%), and more emphasis on the development of larger “drive to” parks (5%).

DIANE SAUER, Director

STEPHEN BENTLEY, Capital Improvements Program Manager

Raleigh Parks and Recreation Department

PO Box 590

Raleigh, N.C. 27602

Diane Sauer: Phone (919) 996-4784 [Diane.Sauer@raleighnc.gov](mailto:Diane.Sauer@raleighnc.gov)

Stephen Bentley: Phone (919) 996-4784 [Stephen.Bentley@raleighnc.gov](mailto:Stephen.Bentley@raleighnc.gov)

Project Manager: Ron Vine

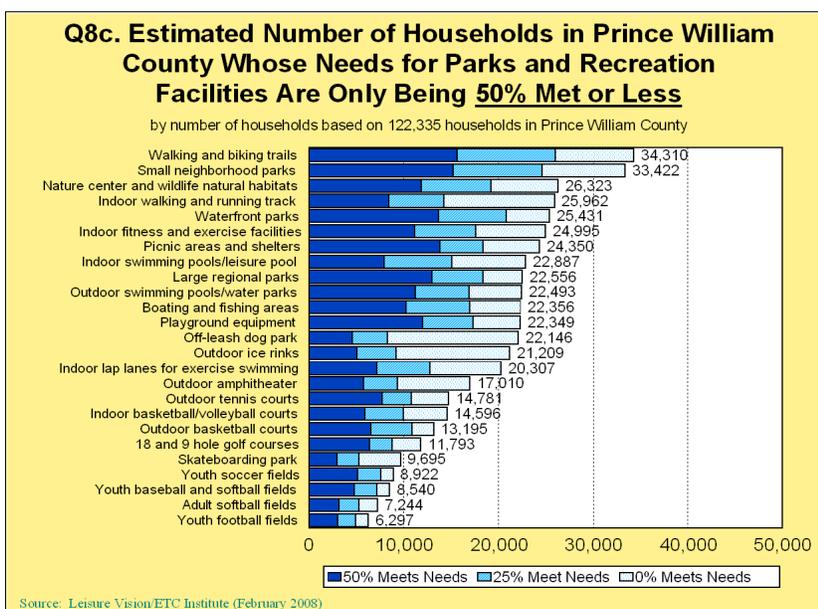


**NEEDS ASSESSMENT SURVEY FOR LONG RANGE PLANNING  
Prince William County, Virginia**

Leisure Vision conducted a Community Attitude and Interest Survey for Prince William County during January and February of 2008 to help establish priorities for the future improvement of parks, greenways, trails, green and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout Prince William County. The survey was administered by a combination of mail and phone.

Leisure Vision worked extensively with Prince William County Park Authority officials in the development of the survey questionnaire. This work included a series of stakeholder interviews with the Board and staff allowing the survey to be tailored to issues of strategic importance to effectively plan the future system.

Leisure Vision completed a total of 1,120 surveys, including at least 136 surveys from each of the seven election districts. The results of the random sample of 1,120 households have a 95% level of confidence with a precision of at least +/-2.9%.



*“Leisure Vision assisted us (PWCPA) in identifying our future direction for development and operations. The citizen survey process provided very valuable insight into what facilities and programs our citizens wanted to focus on. This was a critical part of our system wide comprehensive master plan and allows us to serve our citizens at a much higher level”*

Jay Ellington  
 JAY ELLINGTON, Former Executive Director  
 Currently Director of Parks and Recreation, Butte, Montana  
 1340 Harrison Avenue  
 Butte, Montana 59701 406-497-6408

**NEEDS ASSESSMENT SURVEY (2009)**  
**Glenview Park District, Glenview, Illinois**



Leisure Vision conducted a Community Attitude and Interest Survey in 2008 and 2009 for the Glenview Park District to measure usage and establish priorities for the future development of parks and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout the Glenview Park District. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 500 completed surveys within the Glenview Park District. This goal was far exceeded with nearly 700 surveys having been completed within the Park District. Results from the survey were compared to Leisure Vision's National Benchmarking Data-Base and Leisure Vision's Illinois Benchmarking Database. These comparisons showed that the Glenview Park District has better customer satisfaction, usage of parks and participation in recreation programs, and higher overall measurements of value than the average communities in our national and Illinois benchmarking data-bases. The results of the random sample of 504 households have a 95% level of confidence with a precision of at least +/- 4.4%.

*"Ron Vine is the best in the country when it comes to Interest and Attitude Surveys for Parks and Recreation. His experience and ability to benchmark your results to other communities on both a local and national level provides credibility to the research."*

Chuck Balling, Executive Director

CHUCK BALLING, Executive Director  
Glenview Park District  
1939 Prairie Street  
Glenview, Illinois 60025  
(847-521-2250)

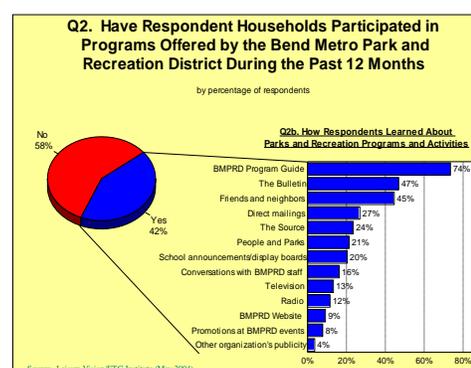
**NEEDS ASSESSMENT SURVEY AS  
COMPONENT OF MASTER PLAN (2004),  
NEEDS ASSESSMENT SURVEY (2008)  
Bend Metro Park and Recreation District**



Leisure Vision conducted a statistically valid mail/phone survey for this rapidly growing Oregon community that won the 2006 Gold Medal Award as part of a long range strategic plan. The survey was conducted to help evaluate usage and satisfaction with the current system and establish priorities for the future system.

The goal of the 2004 survey was to obtain at least 600 completed surveys. 707 surveys were actually completed. The sampling of 707 households had a 95% level of confidence with a precision of at least +/-3.7%.

Results from the survey showed that in 2004 a percentage of Bend residents participated in the programs and facilities of the Park District, and satisfaction with the agency was very high. The chart above shows that in 2004 the primary methods respondents learned about activities was through the program brochure, friends and neighbors, and direct mail.

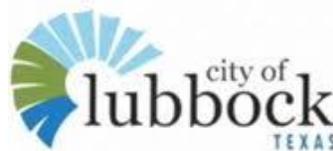


Leisure Vision conducted an update of this needs assessment effort in 2008.

*“The survey methodology employed by Leisure Vision gave us data that we could depend upon and helped our agency focus on those things that are most important to the citizens of our district. It identified areas where service is adequate and areas that needed additional attention. Because of the vast number of surveys conducted by Leisure Vision specific to parks and recreation, they were able to use our data to benchmark against peer agencies nationwide to give us an idea of where we stand and allowed us to prescribe service standards tailored to Bend.” Don Horton, Executive Director*

DON HORTON, Executive Director  
Bend Metro Park and Recreation District  
200 Pacific Park Lane  
Bend, Oregon 97701  
(541) 389-7275

## NEEDS ASSESSMENT SURVEY (2010) City of Lubbock, TX

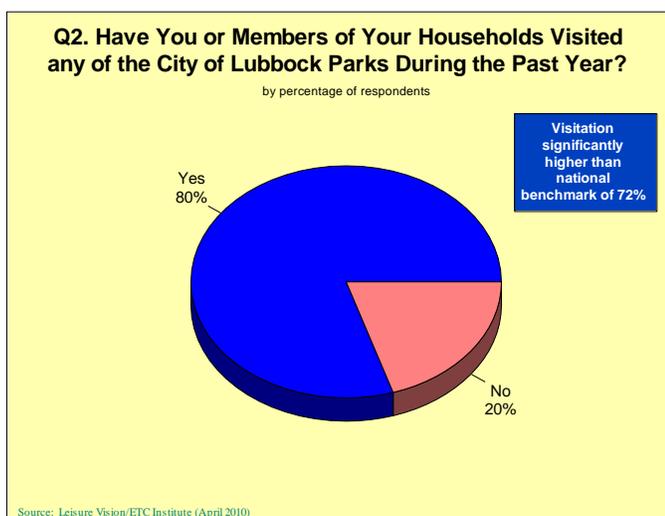


Leisure Vision conducted a Parks and Recreation Needs Assessment Survey during March and April of 2010 in this community of 250,000 residents. The purpose of the survey was to establish priorities for the future development of parks and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout the City of Lubbock. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 500 completed surveys from City of Lubbock households. This goal was far exceeded, with a total of 651 surveys having been completed. The results of the random sample of 651 households have a 95% level of confidence with a precision of at least +/-3.8%.

Key findings included:

- Usage of city parks was significantly higher than the national average.
- Additions that the highest percentage of households would like to have made to individual City of Lubbock parks are: walking/jogging trails (55%), shaded areas (53%), drinking fountains (38%), playgrounds (36%), and picnic shelters (34%).
- Respondents would allocate \$37 out of \$100 towards the improvements/maintenance of existing parks, pools, sports and recreation facilities. The remaining \$63 were allocated as follows: acquisition and development of walking and biking trails (\$20), development of new recreation/aquatic center (\$15), construction of new sports fields (\$12), acquisition of new park land and open space (\$11), and “other” (\$5).



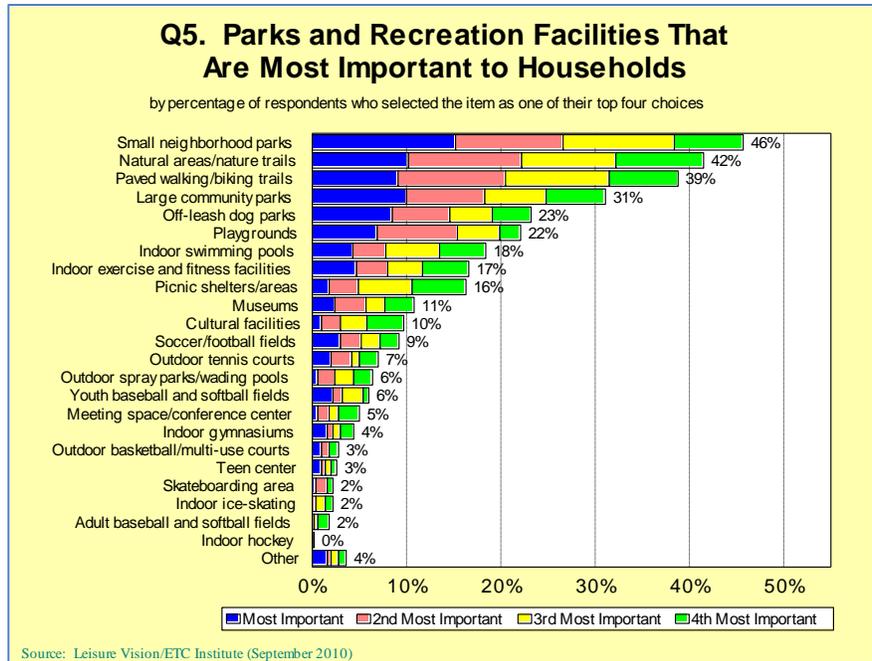
RANDY TRUESDELL, Executive Manager  
Parks and Recreation Department, Lubbock, Texas  
1611 10<sup>th</sup> Street  
Lubbock, Texas 79401  
(806) 775-2673



**NEEDS ASSESSMENT SURVEY PRIOR TO LONG RANGE PLANNING (2008)**  
**CUSTOMER SATISFACTION SURVEYS (2006, 2008, 2010)**  
**NEEDS ASSESSMENT SURVEY AS COMPONENT OF MASTER PLAN (2003)**  
**NEEDS ASSESSMENT SURVEY (2010)**  
**Shoreline, Washington**

Leisure Vision conducted a Parks and Recreation Needs Assessment Survey for the City of Shoreline Parks, Recreation and Cultural Services Department during the summer of 2010. The purpose of the survey was to help the City plan for the future parks, recreation and cultural needs of the community. The survey was designed to obtain statistically valid results from households throughout the City of Shoreline. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 500 completed surveys from City of Shoreline households. This goal was accomplished, with a total of 508 surveys having been completed. The results of the random sample of 508 households have a 95% level of confidence with a precision of +/- 4.3%.



*“In 2006, we selected a list of park acquisitions and improvements based on an ETC survey for the city’s first bond issue. We received more than a 70% YES vote from the community. We continue to use ETC Institute for citizen satisfaction surveys and updates to master planning documents to be sure we are meeting the needs of the community.”*

DICK DEAL, Director of Parks, Recreation, and Cultural Services  
 City of Shoreline, Washington  
 17544 Midvale Avenue North  
 Shoreline, Washington 98133  
 (206) 801-2601

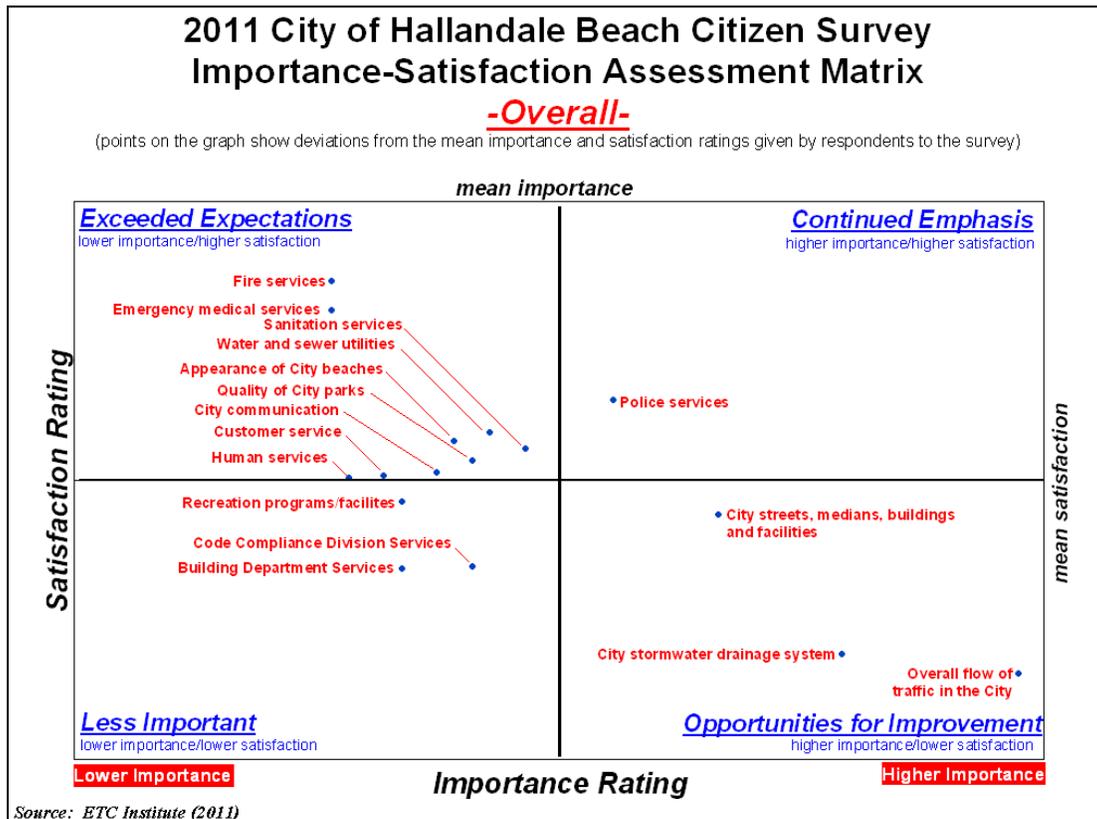
## Examples of Other Florida and Recent Projects

### COMMUNITY SURVEY (2011) City of Hallandale Beach, Florida



During the summer of 2011, ETC Institute administered a citizen survey for the City of Hallandale Beach. The purpose of the survey was to assess resident satisfaction with the delivery of major City services and to help set priorities for the community as part of the City’s ongoing strategic planning process. The seven-page survey was administered to a random sample of 800 residents. The results for the random sample of 800 households have a 95% level of confidence with a precision of at least +/- 3.4%.

To help the City better understand and use the 2011 survey data, ETC Institute performed an Importance-Satisfaction Analysis of the survey data. Importance-Satisfaction Analysis is a tool that transforms complex survey data in a format that can be more easily understood by senior managers. The Importance-Satisfaction analysis is based on the concept that public agencies will maximize overall satisfaction among residents and key customer groups by emphasizing improvements in those service categories where the level of satisfaction is relatively low and the perceived importance of the service is relatively high. ETC Institute currently provides this analysis for nearly 300 governmental organizations. One of the I-S matrix charts from the 2011 Hallandale Beach Survey is shown below.



## NEEDS ASSESMENT SURVEY (2011) Coral Springs, Florida

During February 2011, ETC Institute developed and administered a **citizen satisfaction survey** for the City of Coral Springs. The purpose of the survey was to determine how satisfied residents were with the quality of City services and to gather input about priorities for the community.



A seven-page survey was mailed to a random sample of 3,000 households in the City of Coral Springs. Approximately seven days after the surveys were mailed, residents who received the survey were contacted by phone. Those who indicated that they had not returned the survey were given the option of completing it by phone or over the Internet. A total of 1,217 completed surveys (41% response rate). The results for the random sample of 1,217 households have a precision of at least +/-2.8% at the 95% level of confidence.

The results from the survey showed that the City of Coral Springs rated at or above the U.S. and Florida averages in all 47 areas that were assessed on the survey. Seventy-nine percent (79%) of the residents surveyed in the City of Coral Springs were satisfied (ratings of 4 or 5 on a 5-point scale) with the overall quality of City services compared to a national average of just 56% and a Florida average of 60%. Ninety-two percent (92%) of the residents surveyed were satisfied (gave ratings of 4 or 5 on a 5-point scale) with the quality of fire services, 91% were satisfied with the quality of emergency medical services, 84% were satisfied with the quality of City parks, 84% were satisfied with the quality of police services, and 81% were satisfied with the quality of water and sewer utilities. Below is one of the chart taken from the benchmarking analysis provided by ETC Institute for Coral Spring in February 2011.

## COMMUNITY ATTITUDE AND INTEREST SURVEY (2009)

### City of Sunrise, Florida



The City of Sunrise Leisure Services Department conducted a Community Attitude and Interest Survey during the fall of 2009. The purpose of the survey was to help establish priorities for the future improvement of parks and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout the City of Sunrise. The survey was administered by a combination of mail and phone.

Leisure Vision worked extensively with City of Sunrise officials, as well members of the Gladding Jackson project team in the development of the survey questionnaire. This work allowed the survey to be tailored to issues of strategic importance to effectively plan the future system.

Leisure Vision mailed surveys to a random sample of 1,500 households throughout the City of Sunrise. Approximately three days after the surveys were mailed each household that received a survey also received an electronic voice message encouraging them to complete the survey. In addition, about two weeks after the surveys were mailed Leisure Vision began contacting households by phone. Those who indicated they had not returned the survey were given the option of completing it by phone.

The goal was to obtain a total of at least 300 completed surveys from City of Sunrise households. This goal was accomplished, with a total of 328 surveys having been completed. The results of the random sample of 328 households have a 95% level of confidence with a precision of at least +/-5.4%.

## **INDOOR COMMUNITY CENTER SURVEY (2009)**

### **Village of Pinecrest, Florida**



The Village of Pinecrest conducted an Indoor Community Center Survey during September and October of 2009 to establish priorities for future programming at the Pinecrest Community Center. The survey was designed to obtain statistically valid results from households throughout the Village of Pinecrest and the surrounding area. The survey was administered by a combination of mail and phone.

Leisure Vision worked extensively with Village of Pinecrest officials, as well as members of the Ballard\*King and Associates project team in the development of the survey questionnaire. This work allowed the survey to be tailored to issues of strategic importance to effectively plan the future system.

In September 2009, surveys were mailed to a random sample of 2,000 households throughout the Village of Pinecrest and the surrounding area. Approximately three days after the surveys were mailed, each household that received a survey also received an electronic voice message encouraging them to complete the survey. In addition, about two weeks after the surveys were mailed, Leisure Vision began contacting households by phone. Those who indicated they had not returned the survey were given the option of completing it by phone.

The goal was to obtain a total of 400 completed surveys, including 300 from households in the Village of Pinecrest, and 100 from households in zip code 33156 but outside of the Village of Pinecrest. This goal was accomplished, with a total of 466 surveys having been completed, including 365 from Village of Pinecrest residents, and 101 from non-Village residents. The results of the random sample of 466 households have a 95% level of confidence with a precision of at least +/- 4.5%.

## COMMUNITY ATTITUDE AND INTEREST SURVEY (2009)

### City of Doral, Florida

The City of Doral Parks and Recreation Department conducted a Community Attitude and Interest Survey during November and December of 2009. The purpose of the survey was to help establish priorities for the future improvement of parks and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout the City of Doral. The survey was administered by a combination of mail and phone.



Leisure Vision worked extensively with City of Doral Parks and Recreation Department officials, as well as members of the AECOM Design and Planning team in the development of the survey questionnaire. This work allowed the survey to be tailored to issues of strategic importance to effectively plan the future system.

Leisure Vision mailed surveys to a random sample of 2,000 households throughout the City of Doral. Approximately three days after the surveys were mailed each household that received a survey also received an electronic voice message encouraging them to complete the survey. In addition, about two weeks after the surveys were mailed Leisure Vision began contacting households by phone. Those who indicated they had not returned the survey were given the option of completing it by phone.

The goal was to obtain a total of at least 400 completed surveys from City of Doral households. This goal was accomplished, with a total of 416 surveys having been completed. The results of the random sample of 416 households have a 95% level of confidence with a precision of at least +/-4.8%

## COMMUNITY ATTITUDE AND INTEREST CITIZEN SURVEY (2009) City of Orlando, Florida

The City of Orlando conducted a Community Attitude and Interest Survey during August and September of 2009 to establish priorities for the future improvement of parks and recreation facilities, programs and services within the community. The survey was administered by a combination of mail and phone.



The goal was to obtain a total of at least 500 completed surveys from City of Orlando residents. This goal was accomplished, with a total of 510 surveys having been completed. The results of the random sample of 510 households have a 95% level of confidence with a precision of at least +/-4.3%.

### Major Survey Findings

- The recreation and open space facilities that the highest percentage of households have used during the past 12 months are: sidewalks/paved trails within parks (48%), picnic areas (39%), bicycle riding/skating trails (36%), swimming pools (34%), playgrounds/tot lots (33%), and community centers (31%).
- The organizations used by the highest percentage of households for indoor and outdoor recreation activities during the past 12 months are: City of Orlando Parks and Recreation (51%), churches (35%), and State of Florida parks (34%).
- The most frequently mentioned reasons preventing households from using City of Orlando parks, recreation facilities or programs more often are: “we are too busy” (31%), “I do not know what is being offered” (30%), and “I do not know locations of facilities” (17%).
- Fifty-five percent (55%) of households would travel at least 1 mile to use a neighborhood park. This includes 21% who would travel 1 mile, 16% who would travel 2 miles, and 18% who would travel more than 2 miles.

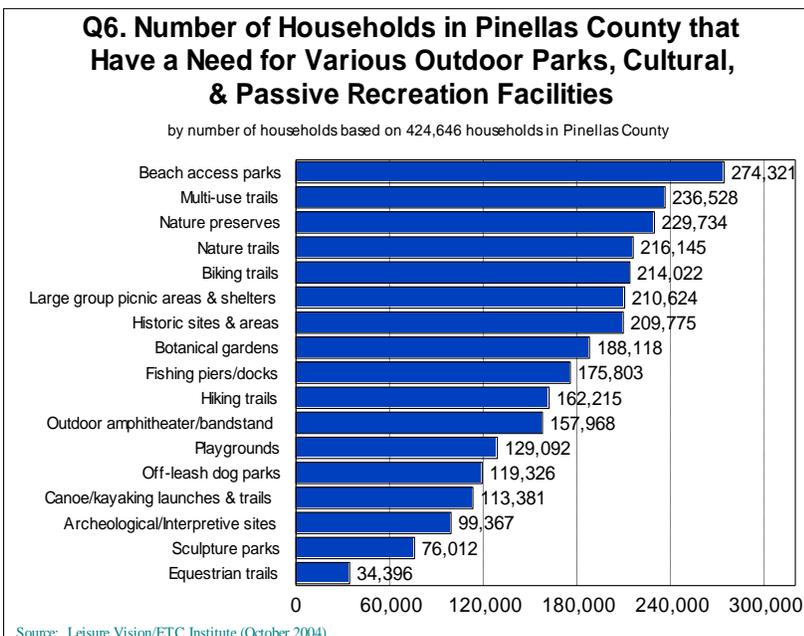
**PARKS AND RECREATION NEEDS  
ASSESSMENT STUDY (2004)  
Pinellas County, Florida**



ETC Institute conducted a statistically valid mail/phone survey for this County of over 900,000 residents. The survey was used as a key component of a parks, recreation, and cultural services master planning effort that was conducted by the Pinellas County. The survey was developed in association with a broad based citizen committee and key administrative staff within Pinellas County.

More than 1,200 needs assessment surveys were completed through a combination of a mail/phone survey. Results from the survey were geocoded so that survey results could be mapped through the County's GIS system.

Extensive cross tabular analysis of survey responses was conducted for a wide range of demographic factors, including age of respondents, gender, household size, and income.



Project Manager: Ron Vine

**COUNTYWIDE NEEDS ASSESSMENT SURVEY (2002) (2014)**  
**Fairfax County, Virginia**



ETC Institute conducted a Countywide Needs Assessment Survey from August through October 2002 for the Fairfax County Park Authority to help determine citizen usage, satisfaction, needs, and priorities for the parks and recreation system. Questions on the survey were based on feedback received from a series of stakeholder interviews, focus groups, and public forums held in Fairfax County. This work allowed the survey to be tailored to issues of strategic importance to effectively plan the future system.

The survey format allowed for feedback both from the *entire household and from individual members of the household*. The majority of questions in the survey called for responses based on the usage, needs, unmet needs, priorities, etc. of “the person taking the survey and members of their household.” A series of questions regarding participation in a wide range of recreation and sports activities were asked based on the person in the household “including children” who will have the next birthday.

The survey was administered by mail and phone. Five thousand surveys, eight (8) pages in length, were mailed to a stratified random sample of households in Fairfax County, broken down into four (4) planning areas throughout the County. Extensive phone calling took place to encourage completion of the mailed survey, or to administer the survey by phone.

The goal was to obtain at least 1600 completed surveys for the County. **This goal was exceeded, with 1694 surveys being completed.** 782 surveys were completed by mail and 912 surveys were completed by phone. The results of the random sample of 1694 households throughout the County have a 95% level of confidence with a precision of at least +/-2.4%.

The results of the survey showed high community usage and support for the system, including a strong likelihood for a successful voter election, if a bond package was developed that was based on the types of land acquisition, renovations, and new parks and recreation facility projects most important to resident households.

***In 2004, the voters of the Fairfax County Park Authority passed a \$65 million bond referendum.***

***Leisure Vision is currently working with the Fairfax County Park Authority on an update of the Master Plan Survey***

Project Manager:        Ron Vine

**NEEDS ASSESSMENT SURVEY (2013)  
Washington, D.C.**



ETC Institute conducted a statistically valid survey with the District of Columbia Parks and Recreation Department. ETC Institute administered 1,200 surveys throughout the District, with a goal of completing 150 surveys in each of 7 different planning areas. The survey was conducted as part of a parks and recreation master plan. The survey was administered by mail and phone.

The purpose of the survey was to help establish priorities for the future development of parks and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout the District of Columbia. The survey was administered by a combination of mail, phone, and online.

The goal was to obtain a total of at least 1,200 completed surveys. This goal was far exceeded, with a total of 1,301 surveys having been completed. The level of confidence is 95% with a margin of error of +/-2.7%.

**PARKS AND RECREATION  
NEEDS ASSESSMENT SURVEY (2005, 2012)  
Teton County/Jackson, Wyoming**

Leisure Vision conducted a Community Attitude and Survey from May to July of 2005 in Teton County/Jackson, Wyoming to help establish priorities for the future development of parks, trails and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout Teton County and the Town of Jackson. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of 400 completed surveys. This goal was accomplished, with 418 surveys having been completed. The results of the random sample of 418 households have a 95% level of confidence with a precision of at least +/-4.7%.

*Results from the survey were used by Teton County/Jackson to pass 2 highly successful voter election projects in 2006.*

*In 2012, Leisure Vision conducted a follow-up survey for Teton County/Jackson.*

**NEEDS ASSESSMENT SURVEYS (2013) (2006)  
AS A COMPONENT OF A MASTER PLAN  
Virginia Beach, Virginia**



ETC Institute conducted a Community Attitude and Interest Survey for the City of Virginia Beach. The purpose of the survey was to help determine the way the City of Virginia Beach Parks and Recreation Department prepares for the future in the development of programs, services and facilities. The survey was administered by mail, phone and on-line. The goal was to obtain a total of at least 800 completed surveys. This goal was far exceeded, with 901 surveys having been completed. The level of confidence is 95% with a margin of error of +/-3.2%

**Of key importance to the Department was an understanding of the importance fitness programs and activities had for respondent households. Major survey findings included:**

- Based on the sum of their top three choices, the three benefits that are most important to households are: improving physical health and fitness (51%), making Virginia Beach a more desirable place to live (40%), helping reduce crime (35%), and preserving open space and the environment (27%).
- Thirty-seven percent (37%) of households indicated they participate in fitness related activities 3 days per week or more. Ten percent (10%) indicated they participate 2 days per week, while 16% do so 1 day per week.
- Over half (51%) of respondents indicated they prefer to participate in fitness related activities on their own. Eight percent (8%) prefer instructor-led classes, while 31% prefer either method of participation. Ten percent (10%) of households indicated “neither method”.
- Nearly half (48%) of households indicated that parks, facilities and programs are very important to the overall pursuit of a healthy and active lifestyle.

ETC Institute conducted a previous Community Attitude and Interest Survey in 2006 for the Department.

## MASTER PLAN NEEDS ASSESSMENT SURVEY (2013) Malibu, California

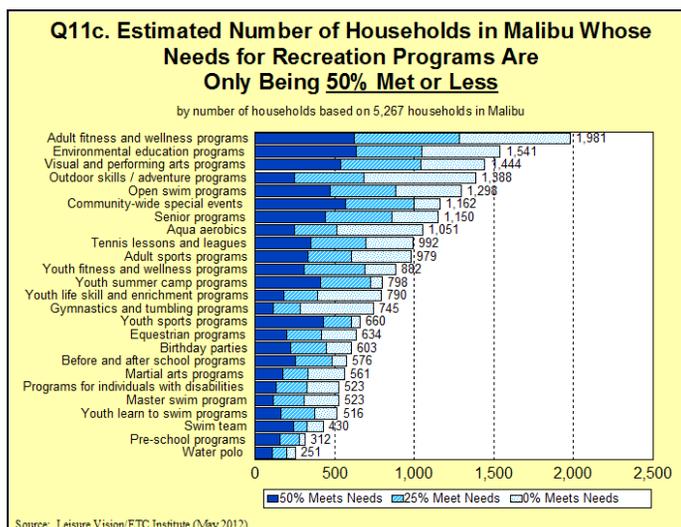
ETC Institute conducted a Community Survey on behalf of the Malibu Parks and Recreation Department during April and May of 2012. The survey was conducted as part of a Master Plan to establish priorities for the future improvement of parks and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout the City of Malibu. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 325 completed surveys. This goal was accomplished, with a total of 355 surveys having been completed. The results of the random sample of 355 households have a 95% level of confidence with a precision of at least +/-5.2%.

### Major Survey Findings

- A high percent of households have visited parks, recreation facilities and sports fields. Eighty-six percent (86%) of households have visited Malibu parks, recreation facilities or sports fields during the past year.
- Of the 86% of households that have visited Malibu parks, recreation facilities or sports fields during the past year, 40% have visited them at least once a week
- High unmet needs exist for a wide range of program areas. From a list of 25 recreation programs, households that have a need for programs were asked to indicate how well these types of programs in Malibu meet their needs.

The graph to the right shows the estimated number of households in the City of Malibu whose needs for programs are only being 50% met or less, based on 5,267 households in the City.



## MASTER PLAN NEEDS ASSESSMENT SURVEYS (2001) (2013) Peoria, Arizona



ETC Institute conducted a Parks and Recreation Needs Assessment Survey on behalf of the City of Peoria in the spring of 2013. The purpose of the survey was to help establish priorities for the future development of amenities and services/programs, and is being conducted as a component of a citizen-driven master plan. The survey was designed to obtain statistically valid results from households throughout the City of Peoria. The survey was administered by a combination of mail and phone.

The goal is to obtain a total of at least 800 completed surveys. To-date a total of 536 surveys have been completed. The level of confidence is 95% with a margin of error of +/-4.2%.

### Major Survey Findings

- Use of City of Peoria Parks and Trails. Sixty-four percent (64%) of households have used City of Peoria parks during the past 12 months, and 47% have used City of Peoria trails during the past 12 months. Twenty-six percent (26%) of households have not used City of Peoria parks or trails during the past 12 months.
- Overall Condition of City of Peoria Parks and Trails. Of the households that have used City of Peoria parks or trails in the past 12 months, 37% rated the overall condition of the parks/trails as “excellent”, and 56% rated them as “good”. An additional 7% of households rated the parks/trails as “fair”, and only 1% rated them as “poor”.
- Paying Additional Tax Support to Develop and Operate Parks and Recreation Facilities. Seventy-five percent (75%) of respondents are willing to pay some amount of additional tax support per month to develop and operate the types of parks, trails, library, and recreation facilities that are most important to their household. This includes 38% that would pay \$1-\$4 per month, 22% that would pay \$5-\$9 per month, and 15% that would pay \$10+ per month.

Project Manager: Ron Vine

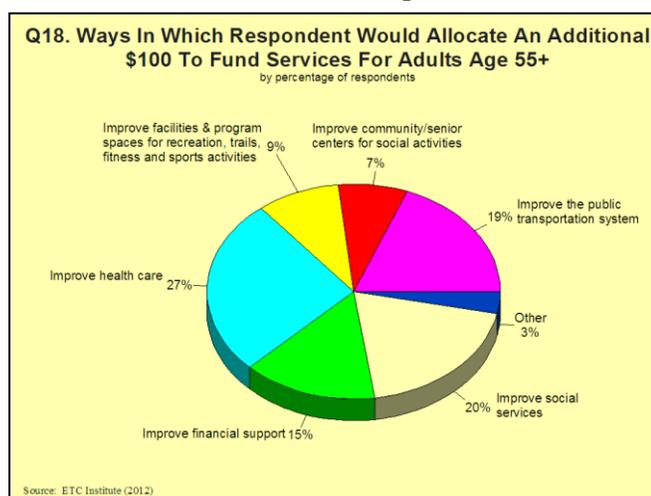


## SURVEY FOR ADULTS 55 YEARS OF AGE AND OLDER The Maricopa Association of Governments (2012)

ETC Institute conducted this county-wide survey for Maricopa County, Arizona, a county of over 3 million residents, in order to measure overall satisfaction and concerns with quality of life and service issues impacting adults 55 years and older, to understand participation and usage of current and future services, to understand priorities for current and future services, and to understand financial tax support for potential services

The survey was administered by mail and phone to a randomly selected sample of respondents 55 years of age and older. The sample was stratified to ensure the completion of at least 200 surveys in each of 4 age categories. 1,034 surveys were completed, with a confidence level of 95% and a margin of error of +/- 3.1% overall.

Survey findings showed that public parks and trails were the most frequent leisure activities for adults 55 and older in Maricopa County and that there was strong interest in additional active recreation opportunities being provided. Health care issues were the major future concern of adults over 55.



One of the key findings from the survey was how adults over 55 years of age would allocate \$100 in resources for specific services. Improving health care was the single biggest receiving of funding with \$27 out of \$100 going to this area. Respondents indicated that \$16 out of \$100 should go towards improving facilities and program services for recreation, trails, fitness and sports activities and for improving community centers for social activities. These dollar amounts were close to equal with how many dollars should be set aside for public transportation.

**COMMUNITY INTEREST AND OPINION SURVEY (2011)**  
**City of Las Cruces Parks and Recreation Department (City of Las Cruces, NM)**



Leisure Vision conducted a Community Interest and Opinion Survey in 2011 for this City of 100,000 residents. The purpose of the survey was to gather input to help determine parks, trails, open space and recreation priorities for the community. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 400 completed surveys from City of Las Cruces households. This goal was accomplished, with a total of 403 surveys having been completed. The results of the random sample of 403 households have a 95% level of confidence with a precision of at least +/-4.7%.

**PARKS AND RECREATION NEEDS ASSESSMENT STUDY (2007) (2011)**  
**Gurnee Park District, Gurnee, Illinois**

Leisure Vision conducted a Community Survey during May and June of 2007 for the Gurnee Park District to establish priorities for the future improvement of parks and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout the Gurnee Park District. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 400 completed surveys. This goal was accomplished, with a total of 472 surveys having been completed. The results of the random sample of 472 households have a 95% level of confidence with a precision of at least +/-4.5%.

The survey focused on key issues impacting long range planning for the Park District, including current participation in recreation activities, unmet needs and priority programs to be developed, customer satisfaction with existing services, unmet needs for new facilities, trails, and programs, priority support for location of an existing senior center, and other planning issues. Extensive cross-tabular analysis of survey responses and benchmarking were conducted, including national and Illinois benchmarking.

In 2011, Leisure Vision conducted a follow-up survey

## NEEDS ASSESSMENT SURVEY (2010)



### Cleveland Metro Parks, Ohio

ETC Institute conducted a Community Survey for Cleveland Metroparks in 2010. The purpose of the survey was to gather input to help establish priorities for the improvement of park facilities, programs and services for Cleveland Metroparks. The survey was administered by a combination of mail and phone. A total of 1,246 surveys were completed, including 211 from Hinckley Township households, and 1,035 from Cuyahoga County households. The results have a 95% level of confidence with a precision of at least +/-2.8%.

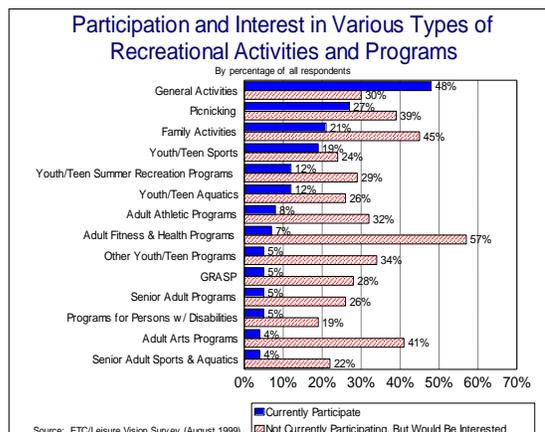
A key element of the survey was to understand usage of Lakefront Parks and preferred future management and financing of Lakefront Parks, which and the time of the survey were operated by three (3) different governmental agencies, including Metro Parks. Results of the survey showed that sixty-four percent (64%) of households have visited parks on Cleveland’s lakefront parks in the past 12 months. Forty-seven percent (47%) of households felt that Cleveland’s lakefront parks should all be operated by the same organization, with 70% of those households feeling that lakefront parks should be operated by Cleveland Metroparks. Based in part on survey findings, all operations of lakefront parks and a revenue stream for operations have been transferred to Cleveland Metroparks.



## NEEDS ASSESSMENT SURVEY FOR MASTER PLANS (1998-99, 2004, and 2010)

### Glendale, Arizona

Leisure Vision was selected as part of a consulting team to conduct this 1998-99 long range planning study for the City of Glendale Arizona. Glendale has a population of over 200,000 residents. Leisure Vision was involved with the public involvement aspects of the study, including conducting a statistically valid mail/phone survey of 600 households as part of the master planning study.



**Results from the study were used in the planning of a major \$100+ million tax election by the city which successfully passed in 1999, with half of the dollars being targeted for trail’s initiatives.**

In 2004, Leisure Vision was selected as part of a long range planning team to do an update regarding the open space plan, specific to trail and green space opportunities in Glendale. In 2010, Leisure Vision was again selected as part of a long range planning team.

**Section 4**  
***Fee Proposal***

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**Village of Key Biscayne Public Opinion/Needs Assessment  
Surveying Services**

**Fee Proposal –October 9<sup>th</sup>, 2014**

***ETC Institute/Leisure Vision***

**Base Services for Needs Assessment Survey**

Number of Surveys	500
Level of confidence	95%
Margin of error	+/-4.4%
<b>FEES FOR SURVEY DESIGN</b>	<b>\$5,500</b>
FEES FOR SURVEY ADMINISTRATION	\$13,500
FEES FOR PRESENTATION OF SURVEY RESULTS	\$3,500
<b><i>Total Fees (all fees include expenses)</i></b>	<b>\$22,500</b>

**Optional Services**

Geocoding of surveys	\$1,500
Importance-Unmet Needs Analysis	\$900

**Section 5**  
***Project Team***

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## **PROJECT TEAM**

**RON VINE, PROJECT MANAGER: RON WILL MANAGE THE OVERALL PROJECT AND WILL LEAD ALL CLIENT COMMUNICATION EFFORTS. RON WILL DO ALL THE ON-SITE MEETINGS AND PRESENTATIONS, DESIGN THE SURVEY AND CONDUCT ANALYSIS OF SURVEY RETURNS.**

**DR. ELAINE TATHAM: DR. TATHAM WILL MANAGE ALL RESEARCH EFFORTS INCLUDING SAMPLING DESIGN, DATA ENTRY, PHONE CALLING, MAIL DISTRIBUTION, STATISTICAL ANALYSIS.**

**RACHAEL SNIDER: MS. SNIDER WILL HANDLE ALL ASPECTS OF REPORT WRITING, BENCHMARKING AND ASSIST RON VINE ON SURVEY DEVELOPMENT.**

**FULL RESUMES ARE ON THE FOLLOWING 4 PAGES.**

## **RON VINE, SENIOR VICE PRESIDENT**

### **Education**

*M.S., Public Parks and Recreation, University of Illinois, 1975*

*B.S., History, University of Illinois, 1973*



### **Experience**

For more than 30 years, Mr. Vine has strategically involved citizens and clients into decision making processes that affect their lives, with these efforts resulting in over \$2.5 billion of voter approved initiatives.

Mr. Vine has worked on over 700 public opinion surveys and strategic planning and consulting assignments for a wide variety of governmental projects, including parks and recreation, libraries, community planning, transit, customer satisfaction, and others. Mr. Vine has directed survey efforts in 48 states across the United States, with public sector clients of various sizes ranging up to over 4 million populations.

Ron has served as a facilitator for over 500 stakeholder interviews, focus groups, public forums and consensus building workshops. Ron is skilled in both the use of quantitative phone and mail survey research efforts and qualitative research and has managed on-site survey research efforts. Ron is considered one of the nation's leading experts in the use of **benchmarking research** to assist communities in understanding the results of their citizen survey data, developing realistic performance measurements, and short and long range strategic decision-making and in the development of strategic planning initiatives to **successfully pass voter initiatives**.

Mr. Vine is skilled in both the use of quantitative phone and mail survey research efforts and qualitative research. He has served as a facilitator for over 500 stakeholder interviews, focus groups, public forums and consensus building workshops. Ron is considered one of the nation's leading experts in the use of **benchmarking research** to assist communities in understanding the results of their citizen survey data, developing realistic performance measurements, and short and long range strategic decision-making.

Prior to starting work as a private consultant in 1989, Mr. Vine worked for 15 years in a series of high level governmental administrative positions, including serving as the Director of Parks and Recreation for Topeka, Kansas as well as serving as the Chief Administrative Officer for the Township of Canton where he managed a work force of over 1,200 municipal employees as well as an operations and capital budget in excess of \$200 million. .

Mr. Vine has considerable experience conducting quantitative and qualitative research for large scale planning studies involving other design, planning and economics consultants. He is a recognized expert in the financial operations of public governments and non-profits and is particularly skilled in the development of innovative public private partnerships to provide needed customer services, while reducing the tax costs to construct and operate facilities.

*Mr. Vine has managed Market Research Surveys for over 600 parks and recreation projects including the following sampling:*

Arlington County, VA	La Quinta, CA	Prince William County, VA
Aurora, CO	Las Vegas, NV	Provo, UT
Atlanta, GA	Long Beach, CA	Raleigh, NC
Cordova, CA	Los Angeles, CA	Rosemead, CA
Clark County, NV	Lubbock, TX	Saint Paul, MN
Cleveland Metro Parks, OH	Prince George's County, NC	San Diego, CA
Columbus, OH	Malibu, California	San Francisco, CA
DeKalb County, GA	Mesa, AZ	Santee, CA
Denver, CO	Miami, FL	Somerset County, NJ
East Baton Rouge, LA	Miami-Dade County, FL	State of Kentucky
Edina, Minnesota	Monmouth County, NJ	State of Texas
Fairfax County, VA	Morris County, NJ	St. Louis County, MO
Fair Oaks, CA	Napa, CA	Tempe, AZ
Fort Lauderdale, FL	Norfolk, VA	Tracy, CA
Glendale, AZ	Northern Regional Parks, VA	Tucson, AZ
Greenville County, SC	Oakland County, MI	Virginia Beach, VA
Henderson, NV	Orangevale, California	Washington, D.C.
Hillsborough County, FL	Orlando, FL	Westchester County, NY
Kansas Township of Canton, MO	Peoria, AZ	
	Pinellas County, FL	

Mr. Vine is a regular speaker at numerous state and national conferences and workshops on conducting statistically valid surveys for public and non-profit projects and using survey feedback in strategic planning, master planning, voter elections, and short and long range decision making.

## DR. ELAINE TATHAM, PRESIDENT, ETC INSTITUTE

### Education

*M.B.A., Management, Kansas State University, 1996, first in class*

### Education

*Ed.D., Educational and Psychological Research, University of Kansas, 1971*

*M.A., Mathematics, University of Kansas, 1960*

*B.A., Mathematics, Carleton College, 1958*

Dr. Tatham serves as the President of ETC Institute. She has served as the project manager and/or research manager on over 1,500 public opinion surveys across the country for a wide range of public, non-profit, and private sector clients. Research efforts she has lead have included projects related to customer satisfaction research; transportation research; public utilities research; libraries research; children's education and social welfare research; health care research; parks and recreation research; non-profit research, etc.

Dr. Tatham has served as the Research Director for more than 600 park surveys, including:

Aberdeen (SD)	East Providence (RI)	Naperville (IL)	St. Paul (MN)
Albemarle County (VA)	Elk Grove (IL)	New Haven (CT)	State of Kentucky
Arlington County (VA)	Fort Wayne (IN)	Normal (IL)	State of Missouri
Atlanta (GA)	Fulton County (GA)	Northville (MI)	State of North Carolina
Bend (OR)	Greenville CT (SC)	Oakland County (MI)	State of Rhode Island
Bloomington (IN)	Henderson (NV)	Palm Desert (CA)	State of South Carolina
Blue Springs (MO)	Huron (OH)	Park City (UT)	State of South Dakota
Broward County (FL)	Kansas City (MO)	Peoria (AZ)	Superior (CO)
Cedar Rapids (IA)	Kent (WA)	Platte County (MO)	Tempe (AZ)
Champaign, IL	Key Biscayne (FL)	Portland (OR)	Temple (TX)
Claremont (NH)	Las Vegas (NV)	Pinellas County (FL)	Tucson (AZ)
Columbia (MO)	Lawrence (KS)	Richmond (VA)	Tyler (TX)
Deerfield (IL)	Lee Summit (MO)	Rock Island (IL)	University Place (WA)
Denver (CO)	Lindenhurst (IL)	Rutland (VT)	Wake County (NC)
Des Moines (IA)	Lucas County (OH)	San Francisco (CA)	Westchester (NY)
Durham (NC)	Miami (FL)	Sheridan (WY)	Winnetka (IL)
E. Baton Rouge (LA)	Morris County (NJ)	St. Louis County (MO)	

## Rachael Snider

### Education:

*B.G.S., Honors Communication Studies and Public Administration; University of Kansas  
Honors: Member of Pi Alpha Alpha Public Administration National Honors Society; Barton Cohen Scholarship for Leadership and Ethics  
Certificates in Leadership and Research*



### Experience:

Ms. Snider has worked on projects in counties, cities and municipalities across the US with population demographics ranging in size of up to “900,000”. Ms. Snider is skilled in quantitative and qualitative research methods. Her efforts include benchmarking research, survey development, statistical analysis and comparisons and report development.

Ms. Snider has worked extensively with both the public and private sector clients with an emphasis in parks and recreation and the nonprofit sector. She has been involved with strategic initiatives including research and development, event coordination, volunteer management; grant writing, project management, marketing communications, marketing research and campaign management.

Some examples of clients from both the private and the public sector include:

<i>Orange Township, OH</i>	<i>Sycamore, IL</i>
<i>Youth Volunteer Corps</i>	<i>Eagle Valley, CO</i>
<i>March of Dimes</i>	<i>Temple, CA</i>
<i>Oceans of Mercy</i>	<i>Warrensburg, MO</i>
<i>Alexandria, VI</i>	<i>US Marine Corps</i>
<i>Gahanna, OH</i>	<i>Riverside Transit Agency</i>
<i>Auburn, AL</i>	<i>Olathe, KS</i>
<i>Genesee County, MI</i>	<i>Estes Valley, CO</i>
<i>Austin, TX</i>	<i>Kirkwood, MO</i>
<i>Mecklenburg, VI</i>	<i>Brunswick, ME</i>
<i>Fox Valley, IL</i>	<i>Shawnee County, KS</i>
<i>E. Baton Rouge, LA</i>	<i>Topeka Shawnee County Library</i>
<i>Muskingum, OH</i>	<i>Platte County, MO</i>
<i>Blue Valley, KS</i>	<i>Deerfield, IL</i>
<i>Passaic, NJ</i>	<i>University of Missouri</i>
<i>Burlington, VT</i>	<i>Bethel, MI</i>
<i>Pelican Bay, FL</i>	<i>River Trails, IL</i>
<i>Carlsbad, CA</i>	<i>Orange County, FL</i>
<i>Miami-Dade County, FL</i>	

**Section 6**  
***References***

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**NEEDS ASSESSMENTS FOR PARKS AND RECREATION STRATEGIC PLAN (2002), SURVEY OF ADULTS OVER 50 YEARS (2006), NEEDS ASSESSMENTS FOR STRATEGIC PLANS 2006, 2010**

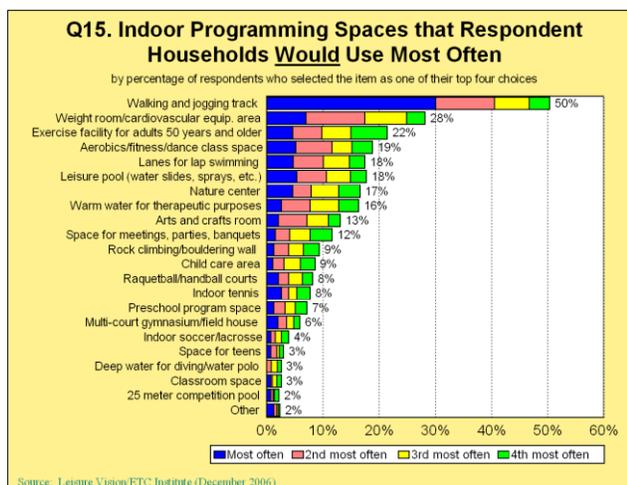


Leisure Vision has conducted four (4) statistically valid surveys for the City of Bloomington Parks and Recreation Department. Three of the surveys were conducted as components of Master Plans.

A statistically valid mail/phone needs assessment survey to 600 residents of the city and county was conducted for each of the surveys.

The 2001 survey identified walking and biking trails as the #1 priority of residents. Since then the City has developed a connecting trail system throughout a major portion of the community.

In the 2006 survey, the need for indoor programming spaces was identified as a high community priority. The chart to the right indicates which program spaces would be used the most often if developed in an indoor recreation center.



In 2009, the City developed a multipurpose indoor community center.

*“We have used ETC Institute/Leisure Vision for multiple Citizen and Interest Survey of our community’s parks and recreation priorities. The results from the surveys have been instrumental in helping us form our Department’s Long Range and Strategic Plans. Each of these surveys was created and administered with the assistance of Ron Vine. I have found Ron to be an excellent resource in drafting appropriate survey questions and interpreting and delivering the final survey results to our community stakeholders. Ron is extremely knowledgeable, professional and responsive. I would highly recommend him as a resource for initiating a community survey.”*

Mick Renneisen, Director  
 MICK RENNEISEN, Administrator  
 Parks and Recreation Department  
 410 N. Morton Street  
 Bloomington, Indiana 47402  
 (812) 349-3700  
[renneism@bloomington.in.gov](mailto:renneism@bloomington.in.gov)



# Mecklenburg County Park and Recreation

*The Natural Place  
To Be...*

[www.parkandrec.com](http://www.parkandrec.com)

## NEEDS ASSESSMENT SURVEY FOR MASTER PLAN (2007, 2013)) Mecklenburg County, North Carolina

ETC Institute conducted a parks and recreation citizen survey during the winter of 2007-08 as part of a comprehensive long range plan for this County of over 800,000 residents. The survey was designed to obtain statistically valid results from households throughout Mecklenburg County to help establish priorities for the future of parks, greenways, trails, recreation facilities, wildlife habitats, programs and services within the County. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 1,000 completed surveys. This goal was accomplished, with a total of 1,033 surveys having been completed. The results of the random sample of 1,033 households have a 95% level of confidence with a precision of at least +/-3.0%.

Results from the survey were used as a cornerstone for successful voter election held in November of 2008, resulting in the passage of a \$250 million bond issue to fund parks and recreation facilities improvements and new projects.

*“We are flying high as you can imagine. We also passed a bond issue last fall for \$35 million for land acquisition. With this added to the \$250 million we can really take a huge step forward.*

*We would not have been successful if not for the master plan and your help. Without question the master plan and therefore the bond package reflected what the residents told us they wanted. Your work to get accurate information was critical to the entire process. Please pass along my thanks to all your team for their hard work. Please pass the word along to your clients. And feel free to quote me at any time.*

JIM GARGES, Director  
Mecklenburg County Park and Recreation Department  
5841 Brookshire Boulevard  
Charlotte, North Carolina 28216  
(704) 336-3854  
[James.Garges@mecklenburgcountync.gov](mailto:James.Garges@mecklenburgcountync.gov)



**NEEDS ASSESSMENT SURVEY (2013-2014)**  
**Miami-Dade County, Florida**

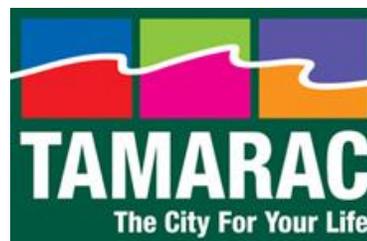
ETC Institute has worked with Miami-Dade County and the Florida Parks and Recreation Department on a County-wide parks and recreation needs assessment survey. The survey was amongst the largest local parks and recreation surveys ever conducted. There were over 8,000 surveys completed and statistically valid results obtained from 80 different sub-geographic areas in Miami-Dade County.

ETC Institute has co-facilitated a workshop with key department staff, and has completed development of the needs assessment survey. As part of the needs assessment process, ETC Institute is geocoding each survey so that the specific location of each returned survey can be used for mapping, and development of strategies focused on serving specific demographic groups as well as locations in the County. ETC Institute is also developing an electronic user friendly system that Miami-Dade County staff can use on an on-going basis for analyzing survey data.

Ron Vine has previously worked with Joe Webb on numerous parks and recreation surveys in large communities including Pinellas County, FL, Orlando, and San Diego.

Joe Webb, Planning Section Supervisor  
Planning and Research Division  
Miami-Dade County Parks, Recreation and Open Spaces Department  
305. 755.7831: [jwebb@miamidade.gov](mailto:jwebb@miamidade.gov)

**Needs Assessment Survey (2007, 2014)  
Tamarac, Florida**



to

Leisure Vision conducted a Community Attitude and Interest Survey for the City of Tamarac in the summer of 2007 to establish priorities for the future development of parks and recreation facilities, programs and services within the City and measure current usage and satisfaction with services.. The survey was designed to obtain statistically valid results from households throughout the city. The survey was administered by a combination of mail and phone.

The goal was to obtain a total of at least 400 completed surveys. This goal was accomplished, with a total of 407 surveys having been completed. The results of the random sample of 407 households have a 95% level of confidence with a precision of at least +/-4.9%.

Leisure Vision is currently working on a follow-up survey for the City of Tamarac

Greg Warner, Director  
Parks and Recreation Department  
6001 Nob Hill Rd, Tamarac, FL 33321  
954. 597.3620: [Greg.Warner@tamarac.org](mailto:Greg.Warner@tamarac.org)



## References for Major Related Project Experience

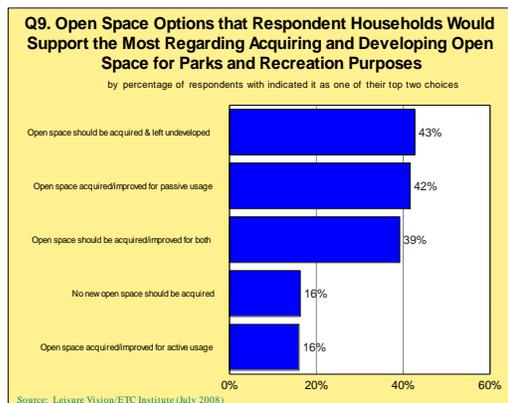
COMMUNITY INTEREST AND OPINION NEEDS ASSESSMENT SURVEY (2006) (2007) and (2010); Oakland County Parks and Recreation Commission, Michigan

Leisure Vision has conducted three Community Attitude and Interest Surveys for the Oakland County Parks and Recreation Commission. The first two surveys were conducted as components of parks and recreation strategic plans. The third survey was to understand issues impacting a successful voter election in 2010.

As an example, the survey in 2008 was conducted in to help establish priorities for the future of parks greenways, trails, wildlife habitats, recreation facilities, programs and services within the County. The survey was designed to obtain statistically valid results from households throughout Oakland County. The survey was completed in association with a parks and recreation strategic plan. The survey was administered by a combination of mail and phone.

The survey identified issues impacting service of the park system such as usage and satisfaction with current parks and facilities; most effective methods of marketing; the overall value of the park system; actions residents would be most supportive of funding with their tax dollar; and other issues.

Of particular importance to the Parks and Recreation Commission was to understand options that were most important to residents regarding acquiring and developing open space. Each respondent was allowed to select their two priority options. The chart to the right shows the results from this question.



*“Oakland County Parks and Recreation has found the research expertise of ETC Institute invaluable in regards to its ability to conduct informational stakeholder interviews, citizen needs assessments and surveys that have been instrumental in creating a successful millage campaign and for facilitating planning efforts.”*

DANIEL J. STENCIL, Executive Officer  
Oakland County Parks and Recreation Commission  
2800 Watkins Lake Road, Waterford, Michigan 48328  
(248) 858-4944  
stencild@oakgov.com



**PARKS AND RECREATION NEEDS ASSESSMENT STUDY (2008) (2011)**  
**Park City, Utah**

Leisure Vision conducted a Community Attitude and Interest Survey to establish priorities for the future development of parks and recreation facilities, programs and services within the community. The survey was designed to obtain statistically valid results from households throughout Park City. The survey was administered by a combination of mail and phone.

Leisure Vision worked extensively with Park City officials in the development of the survey questionnaire. This work allowed the survey to be tailored to issues of strategic importance to effectively plan the future system.

Surveys were mailed to a random sample of 2,000 households in Park City. Approximately three days after the surveys were mailed, each household that received a survey also received an electronic voice message encouraging them to complete the survey. In addition, about two weeks after the surveys were mailed, Leisure Vision began contacting households by phone, either to encourage completion of the mailed survey or to administer the survey by phone.

The goal was to obtain a total of at least 400 completed surveys. This goal was accomplished, with a total of 439 surveys having been completed. The results of the random sample of 439 households have a 95% level of confidence with a precision of at least +/-4.7%.

*“Ron, I wanted you to know that our City Council has made the decision to fund a \$10.5 million renovation of the Racquet Club. The survey you conducted for us was a key component in getting the project approved. The data that identified the Racquet Club as the most used facility as well as the renovation as the most important improvement we could make helped the City Council with their decision.”*

Ken Fischer, Recreation Services Manager

KEN FISCHER, Recreation Services Manager  
 Park City Municipal  
 (435) 615-5411  
 Park City, Utah  
[kfisher@parkcity.org](mailto:kfisher@parkcity.org)

## **COMMUNITY INTEREST AND OPINION SURVEY (2012) Maryland-National Capital Park and Planning Commission**

The Maryland-National Capital Park and Planning Commission conducted a Community interest and Opinions Survey in the spring of 2012. The purpose of the survey was to help establish priorities for the future development of parks and recreation facilities, programs and services within Prince George's County.

The goal was to obtain a total of at least 1,200 completed surveys. This goal was far exceeded with nearly 1,500 surveys having been completed. The survey was administered via mail and phone.



The Planning Commission was interested to see the results of how respondents would allocate an additional \$100 among certain categories of funding. The Maryland-National Capital Parks and Planning Commission discovered residents would allocate funding primarily towards the improvement or maintenance of existing parks (\$37). Other ways households would allocate funding included: development of new indoor facilities (\$26), the acquisition and development of walking and biking trails (\$15), acquisition of new park land and open space (\$12), construction of new sports fields (\$8), and "other" (\$2).

Among other findings the survey found that sixty-three percent (63%) of households indicated they would use a new indoor walking and jogging track if it were to be developed in Prince George's County. Additionally, other programming spaces that households would use include: aerobics/fitness/dance class space (57%), weight room/cardiovascular equipment area (51%), exercise facility for adults 50 years and older (47%), space for meetings, parties, banquets (43%), and leisure pool (water slides, sprays, etc.) (42%).

### **JOHN HENDERSON**

Research and Evaluation Manager

The Maryland-National Capital Park and Planning Commission

Department of Parks and Recreation

7833 Walker Drive, Suite 20LL

Greenbelt, MD 20770

301-446-6851 (W)

240-346-0141 (C)

[John.henderson@mmcppc.org](mailto:John.henderson@mmcppc.org)

Project Manager: Ron Vine

## NEEDS ASSESSMENT SURVEY (2013) Raleigh, North Carolina



ETC Institute conducted a Parks and Recreation Needs Assessment Survey on behalf of the City of Raleigh in January and February of 2013. The purpose of the survey was to help establish priorities for the future development and delivery of parks, trails, recreation facilities, programs and services with the community. The survey was designed to obtain statistically valid results from households throughout the City of Raleigh. The survey was administered by a combination of mail, phone, and online.

ETC Institute worked extensively with City of Raleigh officials, including conducting a ½ day workshop with key management staff for the City of Raleigh park system, as well members of the AECOM project team, in the development of the survey questionnaire. The goal was to obtain a total of at least 800 completed surveys. This goal was accomplished, with a total of 802 surveys having been completed. The level of confidence is 95% with a margin of error of +/-3.4%.

### Major Survey Findings Included:

- Of the 83% of households that visited City of Raleigh parks and trails in the past 12 months, significantly higher than the national benchmarking norm of 72%. Greenway trails were the most visited parks and trails.
- The major reasons for participating in programs were affordable fees and locations of program facility.
- Opportunities exist to increase participation in program areas important to respondent households. For example, 35% of household respondents indicated fitness and wellness programs were one of the top 4 most important programs to their household, but only 20% participated in these programs at parks and recreation facilities.
- Regarding facilities that should have the highest priority for development, thirty percent (30%) of households indicated that the highest priority should be placed on the development of greenway trails/connections closer to home. Other areas that were given highest priority were: more emphasis on the development of smaller “walk to” parks (27%), equal emphasis on the development of small and large parks (22%), and more emphasis on the development of larger “drive to” parks (5%).

DIANE SAUER, Director

STEPHEN BENTLEY, Capital Improvements Program Manager

Raleigh Parks and Recreation Department

PO Box 590

Raleigh, N.C. 27602

Diane Sauer: Phone (919) 996-4784 [Diane.Sauer@raleighnc.gov](mailto:Diane.Sauer@raleighnc.gov)

Stephen Bentley: Phone (919) 996-4784 [Stephen.Bentley@raleighnc.gov](mailto:Stephen.Bentley@raleighnc.gov)

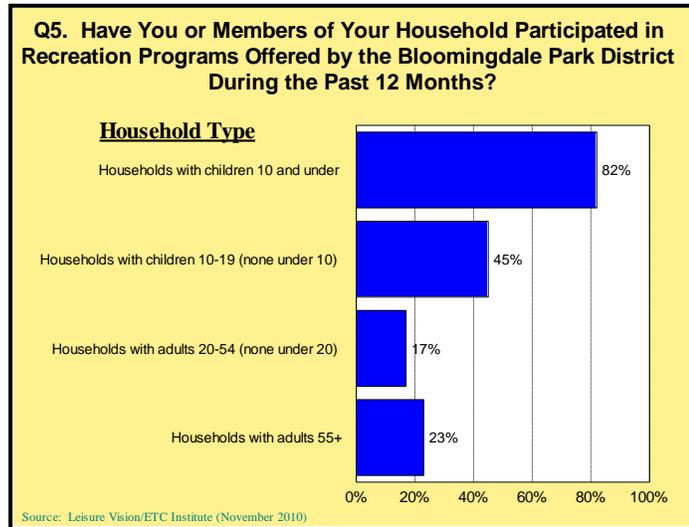
**PARKS AND RECREATION  
NEEDS ASSESSMENT SURVEY (2010)  
Bloomington Park District**



Leisure Vision conducted a Community Survey during the summer and fall of 2010 for the Bloomington Park District. The purpose of the survey was to understand usage and customer satisfaction; needs, unmet needs and priorities for parks, trails and indoor and outdoor facilities and programs; organizations used in the community for indoor and outdoor activities; the ways that respondents learned about Park District programs and activities; and level of support for various actions the Park District could take. The survey was administered by a combination of mail and phone.

A few key findings from the survey

- All of the three major indoor facilities have usage ratings of less than 50% of households with the highest condition ratings being for the Oasis Outdoor Aquatic Center and the Bloomington Park District Museum. 37% of households indicating using the Oasis Outdoor Aquatic Center over the past 12 months, with 56% of those households rating the condition of the Aquatic Center as excellent. Only 18% of households indicating using the Park District Museum over the past 12 months, with 53% of those households rating the condition of the Museum as excellent.
- As the chart to the right illustrates, while overall participation in programs was high, program participation reduced significantly for households with no children. Capturing a larger share of this target market is of strategic importance to the Park District.



**CARRIE HAUPERT FULLERTON**  
Executive Director  
172 South Circle  
Bloomington, Illinois  
(630) 529-3650

**Section 7**  
***Insurance***

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# ACORD™ CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
10/09/2014

<b>PRODUCER</b> Porter-Spears and Bundy PO Box 635  Ottawa KS 66067		THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.	
<b>INSURED</b> ETC INSTITUTE 725 W Frontier Circle  Olathe KS 66061-7203		<b>INSURERS AFFORDING COVERAGE</b>	<b>NAIC #</b>
		INSURER A: UNITED FIRE & CASUALTY COMPANY	
		INSURER B:	
		INSURER C:	
		INSURER D:	
		INSURER E:	

## COVERAGES

THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	ADD'L INSRD	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS
A	Y	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> <b>Contractual Liability</b> <input checked="" type="checkbox"/> <b>CG 2417 INCLUDED</b> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC	60212144	01/06/14	01/06/15	EACH OCCURRENCE \$ <b>1,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>100,000</b> MED EXP (Any one person) \$ <b>5,000</b> PERSONAL & ADV INJURY \$ <b>1,000,000</b> GENERAL AGGREGATE \$ <b>2,000,000</b> PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b>
A		AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	60212144	01/06/14	01/06/2015	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b> BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
		GARAGE LIABILITY <input type="checkbox"/> ANY AUTO				AUTO ONLY - EA ACCIDENT \$ OTHER THAN EA ACC AGG \$
A		EXCESS/UMBRELLA LIABILITY <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> DEDUCTIBLE <input checked="" type="checkbox"/> RETENTION \$ <b>10,000</b>	60212144	01/06/14	01/06/15	EACH OCCURRENCE \$ <b>4,000,000</b> AGGREGATE \$ <b>4,000,000</b> \$ \$ \$
		WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? If yes, describe under SPECIAL PROVISIONS below				<input type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
		OTHER				

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS

Key Biscayne 2014 Needs Assessment Survey

## CERTIFICATE HOLDER

Village of Key Biscayne  
 88 West McIntyre Street  
 Key Biscayne, Florida 33149

## CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.

AUTHORIZED REPRESENTATIVE





**Section 8**  
***Financial Information***

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## Memorandum

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**DATE:** October 9, 2014  
**TO:** City of Key Biscayne  
**FROM:** Jack Foster  
**RE:** ETC Institute / Olathe , Kansas

Sirs: UMB Bank of Kansas City handles the banking for ETC INSTITUTE of Olathe, Kansas. The company has been in business since 1982 and a customer of UMB Bank since 2006.

UMB Bank provides a Line of Credit to the company as well as other financing. The company maintains significant deposit balances with the bank. UMB considers the company to be a very prudent and well run operation, and the operators to be of excellent character.

It is our opinion that the company has the financial strength, resources and capability to finance the work to be performed and complete the agreement with your institution.

I would be happy to provide any other reference or information on the company. You may contact me at 816 860 7191. Please contact me if I can be of assistance.

Jack Foster, Vice President  
UMB Bank, n.a.  
1010 Grand Blvd. (mailstop 102-0201)  
Kansas City, Mo. 64106  
816 860 7191  
816 860 7143 FX  
[jack.foster@umb.com](mailto:jack.foster@umb.com)

**Section 9**  
***Appendices A, B & C***

---

APPENDIX "A"

ACKNOWLEDGEMENT, WARRANTY AND ACCEPTANCE

A. Consultant warrants that it is willing and able to comply with all applicable State of Florida laws, rules and regulations.

B. Consultant warrants that they have read, understand and are willing to comply with all of the requirements of the RFP and the addendum/ addenda nos.

C. Consultant warrants that it will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the Council.

D. Consultant warrants that all information provided by it in connection with this Proposal is true and accurate.

E. CONTINGENCY FEE AND CODE OF ETHICS WARRANTY:

Consultant warrants that neither it, nor any principal, employee, agent, representative or family member has promised to pay, and Consultant has not, and will not; pay a fee the amount of which is contingent upon the Village of Key Biscayne awarding this contract. Consultant warrants that neither it, nor any principal, employee, agent, representative has procured, or attempted to procure, this contract in violation of any of the provisions of the Miami-Dade County conflict of interest and code of ethics ordinances. Further, Consultant acknowledges that a violation of this warranty will result in the termination of the contract and forfeiture of funds paid, or to be paid, to the Consultant, if the Consultant is chosen for performance of the contract.

Signature of Official: \_\_\_\_\_



Name (typed): \_\_\_\_\_

Ron vine

Title: \_\_\_\_\_

Senior vice President

Consultant: \_\_\_\_\_

ETC Institute / Leisure vision

Date: \_\_\_\_\_

Oct. 9<sup>th</sup>, 2014

**SECTION # 4**  
**OTHER CONDITIONS**

**4.1 TERM OF ENGAGEMENT**

The terms of engagement are to be negotiated consistent with the proposal selected.

**4.2 PERMITS, TAXES, LICENSES**

The Consultant shall, at its own expense, obtain all necessary permits, pay all licenses, fees and taxes required to comply with all local ordinances, state and federal laws, rules, regulations and professional standards that would apply to this contract.

**4.3 LAWS, ORDINANCES**

The Consultant shall observe and comply with all federal, state and local laws, ordinances, rules, regulations and professional standards that would apply to this contract.

**END OF SECTION**

**[SPACE LEFT INTENTIONALLY BLANK]**

APPENDIX "B"

NON-COLLUSIVE AFFIDAVIT

State of Kansas

SS: NIA EIV provided

County of Johnson

Ronald A VINE being first duly sworn, deposes and says

that:

(1) He/she is the, (Owner, Partner, Officer, Representative or Agent) of:

ETC Institute / Leisure vision the Consultant that has submitted the attached Proposal;

(2) He/she is fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;

(3) Such Proposal is genuine and is not a collusive or a sham Proposal;

(4) Neither the said Consultant nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other Consultant or person to submit a collusive or sham response in connection with the work for which the attached Proposal has been submitted, or to refrain from responding in connection with such work, or have in any manner, directly or indirectly, sought by agreement or collusion, communication, or conference with any Consultant or person to fix this Proposal or to secure through any collusion, conspiracy, connivance, or unlawful agreement, any advantage against the Village, or any person interested in the proposed Work;

Signed, sealed and delivered

In the presence of

Bonnie S Sheridan  
BONNIE S SHERIDAN

By: Ronald A VINE  
Ron vine  
(Printed Name)  
Senior Vice President  
(Title)



**ACKNOWLEDGMENT**

State of Florida

County of \_\_\_\_\_

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me, the undersigned

Notary Public of the State of Florida personally appeared

\_\_\_\_\_

and whose name(s) is/are subscribed to the within instrument, and he/she/they acknowledge that he/she/they executed it.

WITNESS my hand  
and official seal

\_\_\_\_\_  
NOTARY PUBLIC, STATE OF FLORIDA

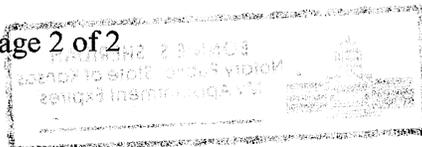
NOTARY PUBLIC  
SEAL OF OFFICE:

\_\_\_\_\_  
(Name of Notary Public: Print, Stamp or  
Type as commissioned.)

- Personally known to me, or
- Produced identification:

\_\_\_\_\_  
(Type of Identification Produced)

- Did take an oath. or
- Did not take an oath.



APPENDIX "C"

**SWORN STATEMENT PURSUANT TO  
SECTION 287.133 (3)(a) FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to the VILLAGE OF KEY BISCAWAYNE, FLORIDA

By ETC Institute / Leisure vision

For Response to RFP # 2014-2

Whose business address is: 725 Frontier circle, Olathe KS 66061

And (if applicable) its Federal Employer Identification Number (FEIN) is: 48-0945023

(if the entity has no FEIN, include the Social Security Number of the individual signing this

Sworn statement - S.S. # N/A)

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with any agency or political subdivision of any other State or of the United States, including, but not limited to, any Proposal or contract for goods or services to be provided to any public entity or an agency or any political subdivision of any other state or of the United States and involving antitrust fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non jury trial, or entry of a plea or guilty or nab contenders.
4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, and means:
- A. A predecessor or successor of a person convicted of a public entity crime; or
  - B. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate.

The ownership by one person of shares constituting a controlling Interest in another person, ore pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws or any state or of the United States with the legal power to enter into a binding contract and which Proposals or applies to Proposal on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of any entity.

Signed, sealed and delivered

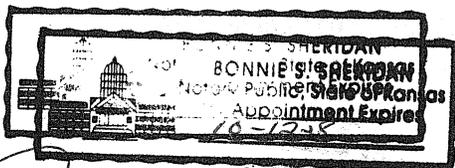
In the presence:

---

By:

BONNIE S. SHERIDAN  
(Printed Name)

Notary  
(Title)



*Bonnie S. Sheridan*

**ACKNOWLEDGMENT**

State of Florida

County of \_\_\_\_\_

On this \_\_\_\_\_ day of, 20 \_\_\_\_, before me, the undersigned Notary Public of the State of Florida personally appeared \_\_\_\_\_ and whose name(s) is/are subscribed to the within instrument, and he/she/they acknowledge that he/she/they executed it.

WITNESS my hand  
and official seal

\_\_\_\_\_  
NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC  
SEAL OF OFFICE:

\_\_\_\_\_  
(Name of Notary Public: Print, Stamp or  
Type as commissioned.)

- Personally known to me, or
- Produced identification:

\_\_\_\_\_  
(Type of Identification Produced)

- Did take an oath. or
- Did not take an oath.

Appendix-C Page 3 of 3

**END OF DOCUMENT**

**Section 10**  
***Proof of Authorization***

---

**FLORIDA DEPARTMENT OF STATE  
DIVISION OF CORPORATIONS**



## Detail by Entity Name

### Foreign Profit Corporation

ETC INSTITUTE INC.

### Filing Information

<b>Document Number</b>	F05000003277
<b>FEI/EIN Number</b>	480945023
<b>Date Filed</b>	05/27/2005
<b>State</b>	KS
<b>Status</b>	ACTIVE

### Principal Address

725 W. FRONTIER  
OLATHE, KS 66061

### Mailing Address

725 W. FRONTIER  
OLATHE, KS 66061

### Registered Agent Name & Address

C T CORPORATION SYSTEM  
1200 SOUTH PINE ISLAND ROAD  
PLANTATION, FL 33324

### Officer/Director Detail

#### Name & Address

Title Secretary, Treasurer

TATHAM, ELAINE L  
14355 W. 142ND  
OLATHE, KS 66062

Title President

TATHAM, ELAINE L  
14355 W. 142ND  
OLATHE, KS 66062

Title CEO

TATHAM, CHRISTOPHER E  
14202 S SHANNON  
OLATHE, KS 66062

### Annual Reports

Report Year	Filed Date
-------------	------------

2012	01/12/2012
2013	04/03/2013
2014	03/16/2014

**Document Images**

<a href="#">03/16/2014 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/03/2013 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">01/12/2012 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">03/10/2011 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
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<a href="#">03/14/2006 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">05/27/2005 -- Foreign Profit</a>	<a href="#">View image in PDF format</a>