

Request For Proposal for
Telephone Surveys for Angler Fishing Effort and Economic Data

Goal: This request for proposal (RFP) is to review the technical expertise, pricing structure and cost for potential contractors. The work will be to conduct ongoing fishing effort surveys through use of state electronic fishing license frames in California, Oregon and Washington. Occasionally, economic surveys may also be conducted using the angler license frame or additional angler contact information collected by other surveys in the field. The surveys are to be conducted primarily by telephone, but may include internet options for some surveys. The successful contractor will be utilized to conduct the various telephone surveys needed by PSMFC in its partnership with its member state fishery agencies in managing their marine fisheries for the next 3-4 years.

Required Submissions:

1. **Technical Proposal.** (60%) Your technical proposal should detail your companies experience, expertise, hardware and software that will be used, and methods to conduct monthly telephone surveys of licensed marine anglers in the three Pacific states. It should also describe the detailed procedures you would use to sample one of the two surveys described in Attachment I or II. In general the angler license frame sampling is to obtain data on marine anglers fishing in the state. These surveys need to obtain a random sample of marine anglers and the number of trips taken in the month by the following modes of fishing [Private/Rental Boat; Party/Charter Boat, Beach/Bank, and Man-Made Structures (Pier, jetty, dock etc)]. The sample will be transmitted to PSMFC and the appropriate state fishery agency for estimation of total fishing effort by PSMFC or the state.

Describe the exact procedures you would use to conduct the survey for one of the sample programs provided with this RFP (Attachment I or Attachment II). This should include at a minimum, the following: a) statistical methods for the sample draw from the license files provided to you each month by the appropriate state; b) detailed procedures of how you will conduct the sample to obtain all the required information; c) security and procedures for confidentiality of the license data; and d) methods for completing the sample and transmittal to PSMFC for each sample month with no more than an one-month delay [Sample data for trips taken in January must be completed in February and transmitted to PSMFC by March 1st]. A sample survey instrument you would use to obtain the data should also be provided.

2. **Cost Proposal.** (40%) The costs proposal should price out the sample survey you select assuming it would commence on July 1, 2011. Your costs should be your current prices for the period July 1, 2011 – June 30, 2012 and should include all labor, materials and project costs to obtain the data requested for the one sample survey you select from Attachment I or II.

3. **References.** You may also provide a list of references for phone surveys you may have conducted in the past, especially any telephone surveys of recreational anglers.

Questions regarding this RFP shall be submitted in writing no later than May 16, 2011 to:

Michael Arredondo
Pacific States Marine Fisheries Commission
205 SE Spokane Street, Suite 100
Portland, OR 97202
Email: michael_arredondo@psmfc.org

Closing Date for Submission of Proposals:

All proposals must be submitted to PSMFC no later than 5:00 PM, PDT June 6, 2011. The proposals are to be submitted to the following address:

Mr. Russell Porter
Senior Program Manager
Pacific States Marine Fisheries Commission
205 S.E. Spokane St.
Portland, OR 97202

Email: rporter@psmfc.org

Proposals received after 5:00 PM, June 6, 2011 will not be considered.

Proposal Evaluation

All proposals received in accordance with these RFP instructions will be evaluated to determine if they are complete and meet the requirements specified in this RFP. An award will be made to the Proposer whose offer is judged to be the most advantageous to PSMFC. PSMFC expressly reserves the right to reject all proposals and make no award under this RFP.

All Proposals received in accordance with these RFP instructions will be reviewed, analyzed, evaluated and scored in accordance with the criteria described below. If needed, additional information may be requested from one or more Proposers.

During the evaluation period, PSMFC may request additional information in order to fairly evaluate a Proposer's offer. If such information is required, the Proposer will be notified in writing (or by email) and will be permitted a reasonable period of time to respond.

Announcement of Successful Bidder:

The vendor selected to conduct and price future actual sampling projects as they come online will be made by June 20, 2011.

Sample Surveys for Pricing:

The following sample proposals are attached to this RFP: Attachment I. Washington License Frame Phone Survey and Attachment II. California License Frame Phone Survey. You should select one of these proposals for the technical and cost proposal you submit. Submissions for both proposals are not required.

Attachment I.

Survey A: Washington License Frame Phone Survey

Introduction:

Fishing effort is to be estimated using a phone survey of licensed anglers referred to herein as the Angler License Survey (ALS). A subsample of licensed holders will be telephoned on a bimonthly basis and asked to enumerate their saltwater fishing trips during the preceding two months. In addition, a listing of all licensed charterboat operators in the state will be provided. The results of the phone survey will be used to estimate fishing effort. Results will be transmitted to PSMFC bimonthly within 30 days after the bimonthly sampling period. The Washington Interactive Licensing Database (WILD) frame will be provided by Washington Department of fish and Wildlife for each 2-month sampling period. The contractor will then draw a random sample from the license frame provided, that is sufficient to meet the sampling goals for each 2-month sampling wave. Bidders are encouraged to go to the Washington Department of Fish and Wildlife website to familiarize themselves with the license types and system in Washington. Your proposal should describe how you will draw an appropriate sample from the license frame to properly represent all marine recreational activity in the state for each bimonthly sampling period. The website address is: <http://wdfw.wa.gov>.

Statement of Work:

The sample of trips to allow estimation by PSMFC or the state of the total fishing effort will be obtained through a telephone survey of licensed anglers and licensed charter operations. Effort for four modes of fishing (Private/rental boats, Party/Charter boats, beach/bank, and manmade modes) will be sampled. The sample size for the ALS will be 8,400 for the year proportioned into the 6 two-month sampling waves in accordance with angler effort each wave. Use the following expected angler effort by two-month wave in setting up and pricing your sample:

<u>Wave</u>	<u>Angler Trips</u>
Jan-Feb	2,000
Mar-Apr	3,000
May-Jun	30,000
Jul-Aug	75,000
Sep-Oct	14,000
Nov-Dec	3,000

Two phone surveys will be conducted, one from the database of all WILD-license holders (the states electronic license frame of all anglers), the other from the database of all licensed charter operators that will be provided by the state.. This will generate an

estimate of charter effort, and by eliminating the charter trips from the WILD survey, an estimate of non-charter trips is to be obtained.

In the WILD phone interviews, we wish to know the percentage of anglers that took marine recreational angling trips in each of the two month sample periods and how many be each mode of fishing. For each trip, you should collect the date it occurred, marine catch area (MCA), county returned to, gear type, target species, time of return, and if fishing from a private or rental boat, the number of other anglers on board.

In the charter company interviews, for each day in the two-month period, the number of passengers (anglers) on board and the number of those anglers who purchased their license from the charter company will be recorded (these are paper daily licenses not in the state's electronic WILD system). Charter anglers may have purchased their daily license from the state's WILD system prior to coming to the boat and in that case they will be in the WILD electronic system.

A sample survey instrument should be developed for this RFP with a method to capture the following data elements from each angler interviewed in the phone survey:

- a. License type (Annual, resident, non-resident, daily etc.)
- b. WILD ID number (license number)
- c. Confirm telephone number and phone type
- d. Recreational saltwater fishing trips taken in last 12 months & mode
- e. Recreational saltwater fishing trips taken in the 2-month period.
- f. Dates of trips and weekend or weekday
- g. Mode of fishing for each trip in the 2-month wave
- h. Location of fishing on the trip – ocean, sound, river, or bay
- i. Distance from shore – 3 miles or less; more than 3 miles
- j. Name of river fished in if trip in a river
- k. Upstream or downstream of river saltwater cutoff point (to be provided)
- l. Gear used on trip – rod & reel, spear, dip net, something else
- m. Marine Catch Area (MCA) fished (State areas 1-13, 20=Canadian waters; 71=Oregon waters)
- n. Target Species (record up to three)
- o. Name of marina or launch site returned to if boat fishing
- p. County returned to
- q. Party/Charter Boats – Site returned to – public or private access site
- r. Beach/Bank – Site public or private access or military
- s. Time of day trip completed

Attachment II

Survey B: California License Frame Phone Survey

Introduction:

Fishing effort for marine recreational trips will be estimated using a phone survey of licensed anglers referred to herein as the Angler License Telephone Directory Survey (ALTDS). A subsample of licensed holders will be telephoned on a monthly basis and asked to enumerate their saltwater fishing trips during the preceding month. The results of the phone survey will be used to estimate fishing effort. Results will be transmitted to PSMFC monthly within 30 days after the monthly sampling period. A random sample of anglers will be drawn from the state's electronic license frame that includes over 2 million anglers. The contractor will draw a random sample from the license frame provided that is sufficient to meet the sampling goals for each monthly sampling period. The California license is valid for marine or freshwater fishing. The contractor should assume for pricing and design that about 72% of angler trips for a month will have been in freshwater and 28% in marine waters. This survey is only to sample trips taken in marine waters and these must be screened out. Bidders are encouraged to go to the California Department of Fish and Game website to familiarize themselves with the license types and system in California. The website address is: <http://www.dfg.ca.gov>

Statement of Work:

The sampling effort should be designed to obtain information for all marine recreational trips a contacted angler took in the one month sampling period. The sample size for the year is 26,000 angler contacts. Each of these angler trips need to be classified as to mode of fishing (Party/Charter boats or as called in California - Commercial passenger fishing vessel (CPFV); private/rental boat (PR); beach/bank angling (BB); or fishing from man-made structures (MM) [piers, jetties, docks etc]. In addition your survey should capture geographic area from which the trip departed (see map for the six areas); type of access site from which the trip departed (public or private access site); area fished (ocean of inland bays and estuaries); time of trip (day or nighttime), and target species.

Effort estimates are based on the mean number of trips classified by the above categories from a random sample of licensed anglers from the states electronic license frame of current year licensed anglers. Annual fishing license sales in California are in excess of 2 million licenses.

Your technical proposal should describe how you will conduct the sample to obtain the percentage of anglers that took trips during each sample month by the categories listed above in the first paragraph of the statement of work. It should also describe any software or hardware you will use to conduct the sample..

Describe how you would draw a sample to provide a random statistical sample that can be used to estimate total marine angler trips in the state for the month by the strata specified in the first paragraph of this work statement.

The monthly sample of anglers is to be drawn from the state's new complete electronic license frame that went into effect for 2011. All fishing licenses in the state are issued in the electronic system for residents, non-residents and all other license types. The total annual license sales are approximately 2 million licenses. Contact information including name, address and phone number should be present for all licensed anglers, but some anglers may have some of this data missing. You should describe how you would deal with anglers drawn in your sample that do not have the needed contact information. You should familiarize yourself with the license types issued by the state on their website and describe how you will sample them. The approximate sample for a particular month in developing your proposal can be expected to contain about 43% that fished in freshwater in the past month and 17% who had fished in saltwater in the past month. The remainder will not have taken a fishing trip in the past month. The monthly sample size is in the 1500-3000 range as shown in the table below.

<u>Month</u>	<u>Call Quota</u>
Jan	2,021
Feb	2,021
Mar	2,297
Apr	2,297
May	2,379
Jun	2,379
Jul	2,681
Aug	2,681
Sep	2,093
Oct	2,093
Nov	1,529
Dec	1,529

The following data should be collected during your monthly ALTDS from each contacted angler:

1. County of permanent residence
2. Occurrence of sport fishing activity in the last 12 months
3. Proportion of trips in freshwater and in saltwater in the last 12 months
4. Number of saltwater trips in the last month
5. Dates of saltwater fishing trips in the last month
6. Fishing mode for each trip
7. Area of Trip [ocean or inland marine waters (bays or estuaries)]
8. Trip Type [Target species]
9. Access Type [public or private]
10. For trip in a boat:
 - a. Type of boat (CPFV, or PR)

- b. Day of the week that the trip was taken
 - c. Location of fishing activity
 - d. For private and rental boats, type of access (private or public) and type of facility (*e.g.*, launch ramp, hoist, marina, or beach)
 - e. Date and length of the trip
 - f. Whether fishing occurred at night
 - g. Location where the trip ended (where the angler came ashore)
11. For shore-based trips:
- a. Location of the fishing activity
 - b. Type of access (public or private)
 - c. Duration of the trip (wet-gear hours)
 - d. Whether fishing occurred at night

For PR mode, the site of access for private launch ramps (name of site) is asked to verify type of access. For MM and PR modes, starting and ending times (duration and time of day) is asked. Trips which occur at night, with start and end times outside of daylight hours will be identified for all PR and MM fishing trips.

The trip type is necessary for determining which catch rates to apply from the public access intercept surveys conducted by California Department of Fish and Game. Trip types will be pre-defined. Trips not fitting into a pre-defined category will be categorized later based on the target species.

The access type is needed to determine if the site is a sampled public access site. Private PR ramp sites will be recorded and added to a list based on the description provided over the telephone and an investigation of the site by a state agency sampler, if necessary.

Your dialing sample and response data will be transmitted to PSMFC who will make the estimates of total angler trips by the various strata.

The Six (6) state areas for estimates of effort. These are determined from the location of fishing activity in the license frame phone survey.

