

## Questions / Answers: West Coast Community Economic Survey

Q: Regarding the household survey component of the research, can we assume that you already have explored the 2007 census data (by census track - breakdown of household expenses by over 10 categories (food/beverages, household basic expenses, gift, education, furnishings, etc.)). Are there specific household expense categories you are interested in that are not currently available in the census data? Are the categories / census tracks too broad given your needs? Can you also please clarify what you mean by sources of household income? Are you interested in IRS-defined categories (business-income, employment-income, investment, etc.) and / or industry - employment type of information (which would also be available in the census data)?

A: As for the household expenditures, we are particularly interested in the proportion of expenditures that are made by residents of these eight communities within their respective communities. For example, it is helpful to know what average expenditures on food and beverage is among Westport WA residents. However, to our knowledge, the Census data does not ascertain the proportion of food and beverage expenses that was made in the community of Westport as opposed to driving to the larger shopping areas in Aberdeen.

The household expense categories are generally in line with Census Bureau consumer expenditure survey categories. However, these estimates do not apportion the expenditures between inside city limits and outside city limits as our questionnaire.

The household sources of income categories of interest are contained in question 7 of the Household Questionnaire in Appendix C of the RFP. We are interested in total household income including business-income, employment income, investment income altogether from each of these industries. If these categories can/should be modified to make them more analogous to existing sources of data, suggested changes can be included in proposals.

Q: Regarding the business survey, did you envision a sample drawn from the overall business population (regardless of activity type and / or industry) in each of the 8 locations? Do you have an "ideal" sample size in mind for each location (50, 100)? Do you feel that a 5-7 minute survey will give us enough time to answer the key questions (it seems to be the case but need to double check).

A: The desired completed sample size for each community is contained in Table 2 of the RFP. In some of the communities, a complete census of all businesses will be required to achieve the desired completed sample. For budgeting purposes proposals should assume the response rates and targeted sample size shown in section 3.3 of the RFP.

Q: Will PSMFC provide letterhead and envelopes for the mailing tasks, or should we assume for costing purposes that you will provide files and specifications that can be used to reproduce the letterhead in the quantities necessary to complete the mailings?

A: For costing purposes you should assume that the contractor will supply letterhead and envelopes for the mailing tasks. PSMFC will supply specifications.

Q: On page 8 of the RFP, Task 4d states that a report should be generated documenting non-respondents one week after the reminder postcard is mailed. Should we assume that one week after the reminder postcard is also the mailing date for the second questionnaire/cover letter?

A: Within two working days from the non-responder document is created the second questionnaire should be mailed.

Q: The process for postcard production specifies printing labels and affixing them to the postcards. Is this a necessary step, or can vendors substitute this for a lower-cost production process that results in correct addressing of the postcards?

A: If there is a lower cost method that results in correct addressing of the postcards, that is acceptable and can be used for bidding purposes.

Q: The telephone follow-up/reminder call mentions asking if the respondent needs help filling out the survey. As there is no task outlining requirements for assistance, could you describe who will be providing the help, and if the vendor is required to do so, a listing of what the scope of training will need to be? Or, is the vendor just taking names/numbers to pass back to PSMFC, who will provide the help?

A: In the event that questions arise, the names/numbers of the individuals should be passed back to PSMFC.

Q: Is the attached questionnaire a guide for the length and content for the current study? The cover letters mention time requirements of 30 minutes (residential) and 45 minutes (business), but the attached survey doesn't appear to require that level of effort, so it's unclear what specifications we should use for bidding. Could you provide an estimated questionnaire length for vendors to use when preparing estimates? Would a 4-page letter size questionnaire work for both the residential and for the business studies?

A: The attached questionnaires are a guide for the length and content of the study. Some time was considered necessary for respondents to assimilate the information to complete the surveys.

Q: The figures in Table 2 (page 6) are slightly different than the tables in the budget section (pages 12 and 13). Could you clear up which figures to use? Also, it appears that the Business table on page 12 has household figures in the first column.

A: Table 2 indicates the desired number of respondents to the surveys. However, with non-response assumed at the level shown on pages 12 and 13 the targeted sample will be larger to reach the desired level of responses. In a few communities, with an assumed response rate of

60% for businesses, all businesses in the community will have to be sampled, and even then the number of expected responses will fall short of the number indicated in Table 2.

There is an error in the businesses table. The corrected table appears below.

| <b>Zip Code - City</b>    | <b>Business Population</b> | <b>Business Sample</b> | <b>Expected Response Rate</b> | <b>Number of Responses</b> |
|---------------------------|----------------------------|------------------------|-------------------------------|----------------------------|
| 98595 - Westport, WA      | 106                        | 106                    | 60%                           | 64                         |
| 98230 - Blaine, WA        | 377                        | 317                    | 60%                           | 190                        |
| 97365 - Newport, OR       | 634                        | 398                    | 60%                           | 239                        |
| 97415 - Brookings, OR     | 480                        | 355                    | 60%                           | 213                        |
| 95531 - Crescent City, CA | 416                        | 333                    | 60%                           | 200                        |
| 95437 - Fort Bragg, CA    | 535                        | 373                    | 60%                           | 224                        |
| 94923 - Bodega Bay, CA    | 49                         | 49                     | 60%                           | 29                         |
| 95039 - Moss Landing, CA  | 47                         | 47                     | 60%                           | 28                         |
| <b>Total</b>              | <b>2,644</b>               | <b>1,979</b>           |                               | <b>1,187</b>               |

Q: The tasks do not mention what to do with responses from the open ended question. Would you like these transcribed, coded, transcribed and coded, or some other handling?

A: They should be transcribed and coded. PSMFC will work with the contractor to determine appropriate coding of transcribed entries.

Q: To clarify the final report, it is a brief methodology report (outlining the steps taken to collect the data, number of mailings, responses, response rate, etc.) plus crosstabs showing results for each question in total and by community for both the household and business studies? There is no written analysis or other written summary of findings required by the vendor. Is this correct?

A: Yes, the description of a brief methodology report (outlining the steps taken to collect the data, number of mailings, responses, response rate) plus crosstabs is correct.

Q: The response rates seems high (50%+). Should I assume you have historic data showing this is a reasonable assumption?

A: We do not have historical surveys that indicate a response rate of 50%+. The RFP indicates that there is uncertainty concerning the actual response rates that will be achieved. For the purpose of budgeting, assume that it will be this high.

Q: Are you open to including an online survey link into the mailed letters/information to the respondents to encourage them to complete online for the benefits of 1) expedited responses, 2) reduced costs for mailing back the survey and data entry, 3) better data quality (paper surveys often have missing responses, etc.)

A: For the purposes of completing the budget template, assume that no online survey link will be provided to complete the questionnaire. If a change in proposed methodology is suggested to improve each task, please include them under point 4 in section 3.2 of the RFP.

Q: In our opinion the phone calls are essentially reminder calls to fuel cooperation. Are you open to giving the respondents the option of completing the survey by phone?

A: For the purposes of completing the budget template, assume that the calls are reminder calls. In the event that questions on how to complete the surveys arise, the names/numbers of the individuals should be passed back to PSMFC. If a change in proposed methodology is suggested to improve each task, please include them under point 4 in section 3.2 of the RFP.

Q: According to the RFP Task 1 - "The contractor will review and suggest improvements to the survey-fielding methodology and survey materials developed by PSMFC and NOAA Fisheries ". Does this mean that PSMFC and NOAA have executed this survey in the past? If so, when was this survey done? Who did it? How much did the agency pay for the previous survey?

A: This survey has not been done by the agency in the past.

Q: Which consultants or vendors was this current open RFP sent to?

A: It was sent to numerous potential bidders.

Q: With regards to cost of stamp, should the cost be included in our proposal, if so what category should we put it under?

A: The cost of the stamp should be included in the proposal. Please include it under the category "Material Cost".

Q: Under "Household Survey Household income sources by type" do you wish to have just general household income or total income from IRS?

A: We would like total household income. If by general household income you are referring to income that is non-taxable such taxes on municipal bonds, certain interest income, etc. then this is what we would like.

Q: Would the agency provide us with address and phone numbers of households and businesses, or is it the consultants job to gather this information?

A: The contractor must supply the addresses and phone numbers.

Q: Does the agency prefer local consultants?

A: Local or not local is not a basis for awarding the contract.

Q: Does the agency mandate any pre-qualification for bidders?

A: No, although previous experience is a basis for awarding the contract.

**The following Questions and Answers were added on July 27, 2009.**

Q: Is it possible to get a copies of the both the Business and the Household survey instruments? The RFP included what appeared to be part, but not all of the Household Survey and none of the Business Survey. We need these in order to accurately estimate the amount of time required for programming and for data entry.

A: The surveys are attached in PDF form.

Q: There are a couple of places in the RFP that refer to follow-up telephone calls. At the bottom of page 4, there is a reference to a "follow-up interview". On page 9, there is more information about three questions that will be asked via phone of non-respondents which seem to be more in the line of a reminder phone call and confirmation that the survey was sent to the correct address & individual. Can you confirm that the purpose of the telephone calls is reminder/confirmation rather than conducting the actual interview by phone?

A: Yes, as currently envisioned the calls are for reminder rather than to actually conduct the interview.

Q: Do have any sense of what response rates will be for each community? Overall? These could be based either on prior experience or on experience with similar surveys conducted elsewhere? If not, what percentage would you like us to use for budgeting purposes? We assume that if response rates are lower than anticipated the scope of services and/or contract amount can be renegotiated.

A: The expected response rates for budgeting purposes are shown on pages 12 and 13 of the RFP, but essentially it is 50% for the household survey and 60% for the business survey.

Q: Are there any specific businesses/industries you want targeted in The commercial sample or just a random selection of businesses in each community?

A: We are not targeting specific types of businesses, but for a few communities, because the number of businesses is so few, all businesses will need to be surveyed. In other words the survey will be a complete census rather than a random sample of businesses.

Q: Page 9 of the RFP states that after the reminder calls a telephone log will be delivered to the PSMFC contract officer and that "this telephone log will include telephone number and address for each household and business". While we would have no difficulty complying with this requirement, we are curious as to why the telephone number and address should be included as part of the record. Gilmore usually guarantees that survey information will be held confidential. If we are providing telephone numbers and addresses, we could not make that guarantee to respondents.

A: This is something we can discuss with the selected contractor, as it may not be necessary to receive the telephone numbers and addresses.

Q: There are a couple of different ways to interpret the reporting needs described under Task 6 on page 10. One way to read this requirement is that PSMFC requires a short written method report including response rates for each community accompanied by several sets of crosstabulation tables (overall plus one for each community). The cross-tab tables would have the mean, median, min/max values and standard deviations. Alternatively, a summary report could be a written report including a method section and a written analysis of each survey question, complete with tables & charts plus the crosstabs described above. Can you please clarify which type of report you are looking for?

A: The report should be a brief methodology report (outlining the steps taken to collect the data, number of mailings, responses, response rate, etc.) plus crosstabs showing results for each question in total and by community for both the household and business studies. No additional analysis of the results for each survey question is required.

Q: Is there a need to conduct the surveys in more than one language? If so, which one(s)?

A: English is sufficient.

Q: In a mail survey one of the issues that often comes up is "what constitutes a completed survey?" Have you established criteria in the past for inclusion/exclusion when not all questions are answered? Do we accept all data submitted, only surveys where a valid response is provided for every question, or something in between?

A: All surveys should be accepted and the results entered in the electronic database.

Q: We are concerned about responses to Q6 and Q7 in the household Survey where respondents are asked to allocate 100% across several categories. Our experience is that responses to this type of question are often fraught with mathematical errors. Do you have a procedure you have used in the past. For calibrating responses or have you attempted to reach respondents by phone to have them clarify/correct their answers prior to final data processing?

A: We do not have experience with this type of question. If the contractor has a better, more accurate, method to solicit this type of information, please include that in the proposal.

Q: The information in Table 2 is confusing and does not match the Tables shown on pages 12 and 13. For the household survey, it appears you are planning to send surveys to approximately 29% of the population and hope to complete surveys with half of those for a total household sample of 2,265 to 2,297. The business sample is less clear because the table on page 12 uses the same base number for businesses as it does for population in Table 1 and in the table on page 13. If there are 2,644 businesses (Table 1) and you send to half of them (1,322) and you get a 60% response rate from those you send to, the total business sample would be approximately 795 completed interviews. Can you please clarify how many completed interviews you are hoping to receive from business and how that number is calculated?

A: There is an error in the businesses table. The corrected table appears below.

| <b>Zip Code - City</b>    | <b>Business Population</b> | <b>Business Sample</b> | <b>Expected Response Rate</b> | <b>Number of Responses</b> |
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| Total                     | 2,644                      | 1,979                  |                               | 1,187                      |

Q: Finally, we noticed the work plan is scheduled to start the same day the proposals are due and before vendor selection. For purposes of creating a realistic timeline, should we anticipate work would begin the first week of August?

A: The first week of August is reasonable.