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Office of the City Administrator

PUBLIC WELFARE COMMITTEE

Tuesday, July 9, 2024

5:45 PM

Lower Conference Room

Agenda

- 1) Call to Order, Roll Call
- 2) Approval of Meeting Minutes
Action requested: review and approve
 - a. June Minutes
- 3) Discussion Items
Action requested: discuss and take action as needed
 - a. Vendor Selection for Community Survey
- 4) Work Calendar
- 5) Adjourn

Dated: July 9, 2024

/s/ Dale Mayr, Chair

Notice is hereby given that a quorum of other governmental bodies may be present at this meeting to present, discuss and/or gather information about a subject over which they have decision-making responsibility, although they will not take formal action thereto at this meeting.

Persons with disabilities requiring accommodations for attendance at this meeting should contact the City Clerk's Office at 262-236-2914, twenty-four (24) hours in advance of the meeting.

Any questions regarding this agenda may be directed to the City Administrator's Office at 262-236-2941, Monday through Friday, 8:00 AM – 4:30 PM



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Office of the City Administrator

PUBLIC WELFARE COMMITTEE

Tuesday, June 11, 2024

5:15 PM

Lower Conference Room

Minutes

1) Call to Order, Roll Call

Present:

Chair Dale Mayr

Alderman Gregg Bach

Alderman Brian Parrish -- **Absent**

Also Present: City Attorney Sajdak, Assistant City Administrator Schoenemann, and Executive Assistant Enea

2) Approval of Meeting Minutes

a. May Meeting Minutes

RESULT: **Approved by Voice Acclamation [Unanimous]**

MOVED BY: Alderman Bach

SECONDED BY: Alderman Mayr

AYES: Mayr, Bach

ABSENT: Parrish

3) Polco Presentation

Amy Kavanaugh Flynn, Senior Account Executive from Polco, joined the meeting via Teams to present Polco's proposal to complete the City's next Community Survey. Polco is based in Madison, Wisconsin and is dedicated to building stronger communities through data-driven surveying. Polco has worked with over 500 communities and most of its staff have professional public sector experience. Some nearby communities that have used Polco are West Bend, Waukesha, and Wauwatosa. Ms. Flynn explained the three Polco modules to the Committee, including Assess, Engage, and Track. The statistically valued surveys live in the Assess Module. The National Community Survey was developed in 2001. Polco partnered with ICMA to develop the survey and it features 12 main questions (Governance, Mobility, Parks & Rec, Education & Arts, Community Design, Economy, Natural Environment, Safety, Utilities, Quality of Life, Health & Wellness, and Inclusivity & Engagement) that compares communities

Attachment: PW 061124 Minutes (9516 : June Minutes)

regionally and nationally. It can assess government performance, monitor trends in resident opinion, utilize benchmark comparisons, and inform budget, land use, and strategic plans. There are multiple other surveys available to choose from and to tailor to one's own community. Polco performs a random sampling from a list of household addresses from the USPS. For Mequon, the random sample size would be 3,000 households. For the data collection, a postcard invitation is mailed and then the survey. The survey is then open for six weeks. The final two weeks of data collection are open to the entire community. The survey results for everyone else are kept separate from the random statistical sample. For the data analysis, the results are weighted to match Census data. A report of the results is provided via PDF and an interactive dashboard. Ms. Flynn then shared a sample project timeline. Weeks 1-5 are survey development, weeks 5-7 are printing and mailing, weeks 7-13 are data collection, and weeks 13-17 are analysis and report writing. The Engage Module can be used to ask follow-up questions. The Track Module has 100+ data sources compiled into one place to provide actionable insights and help with Strategic Planning.

4) Work Calendar

At the July meeting, the Committee will discuss the three vendors that presented over the last three months and make a selection on who will conduct the City's next Community Survey.

5) Adjourn

Alderman Bach moved to adjourn at 5:55 P.M. and Alderman Mayr seconded.

Respectfully Submitted,

Carrie Enea
Executive Assistant

Attachment: PW 061124 Minutes (9516 : June Minutes)



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Office of Administration

TO: Public Welfare Committee
FROM: Carrie Enea, Executive Assistant
DATE: July 3, 2024
SUBJECT: Vendor Selection for Community Survey

Background

During the December Committee of the Whole meeting, the Common Council discussed when to conduct the next community-wide survey. The Council's general consensus was to align the City's next survey with the upcoming update of the organization's five-year strategic plan. Bringing public opinion into the development of the next strategic plan would be an insightful element, providing the City with the latest data from residents. Over the first quarter of 2024, staff worked to complete the initial steps to begin the survey development and vendor selection process based on the timeline presented at the February Public Welfare meeting. In late February, staff met with four survey vendors, ETC Institute, Magellan Strategies, Polco, and ZenCity, and narrowed the pool to three service providers. A matrix was developed to begin the vendor selection process and identify the criteria of most importance moving forward in identifying the best suited vendor. The matrix depicted three general categories, which include Cost and Methodology, Question Development, and Administrative items necessary to conduct a community-wide survey.

The three vendors under consideration for conducting the City's next community survey are ETC Institute, Magellan Strategies, and Polco. Each vendor provided the Committee with a 30-minute presentation, with an additional 15 minutes for questions. Magellan Strategies presented at the Committee's April meeting, ETC Institute presented at the May meeting, and Polco presented at the June meeting. For reference, each company's proposals are attached, as well as an updated matrix.

Analysis

It is anticipated that the Public Welfare Committee will deliberate at its July meeting and forward its vendor recommendation to the Common Council for a contract award with any additional feedback the Committee would like presented to the Council. Based on the attached amended timeline and other items before the Council in August, the vendor contract award is expected to occur at the Common Council's September meeting. The timeline has flexibility to account for a September approval by the Council without causing delay of the 2025 survey. Lastly, if the Committee wishes, its August meeting could be used to review the survey topic feedback gathered from all the Boards, Committees, and Commissions that can be sent onto the Council as well in September.

Fiscal Impact

The survey costs based on the three proposals range from \$10,000 - \$48,200, depending on question customization options, delivery method of the survey, and number of residents to receive the survey.

Recommendation

Staff will be ready to gather feedback and direction from the Committee for the 2025 survey.

Attachments:

Magellan Strategies Proposal of Opinion Research Services to the City of Mequon 030524
(PDF)

Mequon 2024 Community Survey Proposal (DOCX)

Mequon WI Polco Update March 2024 (PDF)

Vendor Selection Matrix Updated 070124 (XLSX)

Community Survey Timeline Updated 070224 (DOCX)



Proposal of Community Opinion Research Services to the City of Mequon, Wisconsin

March 6th, 2024



**Magellan
Strategies**
Your Trusted Survey Research Partner

Prepared for Justin Schoenemann, Assistant City Administrator
Prepared by David Flaherty, CEO

Magellan Strategies
4800 Aspen Creek Drive | Broomfield, CO 80023
MagellanStrategies.com | 303-861-8585

About Magellan Strategies

Magellan Strategies is a public opinion research firm specializing in measuring and understanding resident and voter opinion. We have conducted opinion research projects for local governments, school districts, and special districts (metro, library, fire, recreation) since 2007. We work closely with city, county, and town managers, staff, and elected officials and are proud members of the Colorado City and County Management Association (CCCMA) and Colorado Counties Incorporated (CCI). You can learn more about our firm by visiting <https://t.ly/8iG1Y>.



We appreciate the opportunity to submit this proposal to Assistant City Administrator Justin Schoenemann, Executive Assistant Carrie Enea, and the City of Mequon leadership team.

City of Mequon Community Survey Project Needs

The City of Mequon wishes to engage an experienced public opinion research firm to manage a statistically accurate and demographically representative community survey of residents. We anticipate the survey will include questions from past community surveys and perhaps new questions measuring resident opinions of the following issues and topics:

- Quality of life (Mequon as a place to live, work, retire, recreate, raise a family, etc.)
- Rating the importance, quality, and satisfaction of city services and programs.
- Rating of city characteristics (feeling safe, traffic, open space & recreation opportunities)
- Measure opinions of future residential and commercial development types.
- Measure opinions of economic development.
- Measure resident & voter support and opposition levels for potential ballot measures.
- Educate and inform residents of the reasons why the city may be considering a ballot measure to fund city services and programs in the future.

Finally, all surveys will include several open-ended verbatim questions, allowing respondents to share their thoughts and opinions.

The Magellan Community Survey Difference

When choosing an opinion research firm for a high-quality community survey, staff and elected officials should be aware of the different survey data collection methods and databases utilized to complete the project. Magellan Strategies embraces modern data collection methods using MMS text messages and enhanced voter registration databases.

Our survey methods will always produce a more engaging community survey than a traditional, outdated mail or phone-only survey using older, inaccurate resident databases. Just ask some of our awesome government clients.



Simply put, our survey data collection approach and resident engagement process will interview more people, including hard-to-reach populations, than any other opinion research firm using phone-only or mail-paper survey methods. Furthermore, our high-quality surveys with larger sample sizes deliver more value for governments at a similar or lower cost than our competitors. Moreover, our online platform provides residents with a survey experience that is inclusive, informative, and pleasant.

Magellan Strategies Survey Data Collection Methods

One aspect of a statistically valid and representative survey is providing respondents with multiple opportunities to participate. We achieve this standard by implementing two survey data collection methods. The first method sends multiple MMS text (text with an image and message) survey invitations to 50% or more of a community's adult population over a two-week period. These MMS text messages are trustworthy and professional and will reach residents that previous mail surveys have never contacted.



Hello registered voters in the Town of Vail! The Vail Town Council and staff invite you to share your thoughts and opinions in a survey regarding a possible ballot measure about residential property taxes. Your opinion is very important to us. The survey will take just 7 minutes to complete and your answers will be strictly confidential: [link]

REPLY STOP TO OPT-OUT



Hello, Monument residents! The Town of Monument invites you to participate in a very important community survey about local issues, town services, programs, and budget priorities. Make your voice heard by sharing your thoughts and opinions. The survey will take just 15 minutes to complete, and your answers will remain strictly confidential. <https://b.link/Monument>

<https://b.link/Monument>



Hello Loveland residents! The Loveland Housing Authority is conducting a very important survey and wants to know your opinion regarding affordable housing. The survey will only take 7 minutes to complete, and your answers will remain strictly confidential: <http://b.link/Loveland-1>

REPLY STOP TO OPT OUT



Hello. The City of Mequon invites you to participate in an important community survey regarding city services, programs, and amenities. We want to know your opinion, so please make your voice heard. Your answers will be anonymous and confidential, and the survey will take just 10 minutes to complete. Let's get started.

The second data collection method utilizes a city or town's resident email database. We provide staff with a survey link that can be distributed or posted on the city or town's website and sent as a single-purpose email. In addition, many governments will promote the survey on social media channels to raise awareness and encourage participation.

Finally, we generate survey QR codes that can be posted and distributed in government buildings and public areas. These two data collection methods will engage a significantly larger percentage of residents than relying upon phone and mail paper survey collection methods.

Survey Comparisons: Magellan Surveyed 1,642 Residents, Polco 479

We managed an open space ballot measure survey project for the Town of Windsor, Colorado, in 2022. For that project, our survey data collection methods generated 1,642 completed interviews (Windsor's adult population is about 30,000). In comparison, Polco's 2020 mail/paper community survey completed just 479 interviews.

Our survey sent four separate MMS text survey invitations to 17,000 residents. We also utilized the town's email database and social media channels to aggressively promote and encourage residents to participate in the survey over two weeks.

In contrast, Polco sent a mail/paper survey (and two postcard reminders) to just 1,700 households over a three-month period. Another glaring weakness of the Polco mail/paper survey method is the dramatic oversampling of older residents and the lack of engagement among younger residents.

The table below shows the 2020 unweighted results by population subgroup. As you can see, 62% of the total responses were among residents aged 55 or older, and the "population norm" for that subgroup is 30%. At the same time, only 8% of respondents were aged 18 to 34, and the "population norm" for that subgroup is 24%.

Table 72: Windsor, CO 2020 Weighting Table

Characteristic	Population Norm	Unweighted Data	Weighted Data
Housing			
Rent home	17%	11%	17%
Own home	83%	89%	83%
Detached unit*	87%	83%	87%
Attached unit*	13%	17%	13%
Race and Ethnicity			
White	95%	93%	90%
Not white	5%	7%	10%
Not Hispanic	92%	95%	93%
Hispanic	8%	5%	7%
Sex and Age			
Female	51%	60%	51%
Male	49%	40%	49%
18-34 years of age	24%	8%	23%
35-54 years of age	46%	29%	46%
55+ years of age	30%	62%	32%

Needless to say, any competent survey research professional should be very uncomfortable “weighing down” a population subgroup by 30 points for the survey data to be demographically representative of the Windsor adult population.

Our data collection methods may require us to “weigh up” younger population subgroups by 5 to 10 points. However, we will never need to weigh a population subgroup “up or down” by anything close to 30 points.

The Overwhelming Benefits of MMS Text Survey Data Collection

Again, a statistically valid and representative survey should provide respondents with multiple opportunities to participate. MMS text survey data collection meets that standard very well, which is why we have used it in all our opinion research projects since 2020. It works by sending an MMS text survey invitation to a respondent’s cell phone number. Additional benefits of MMS text survey data collection are:

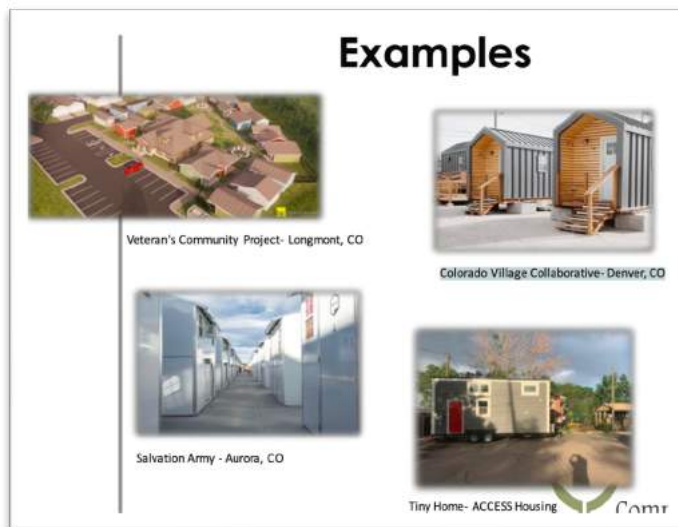
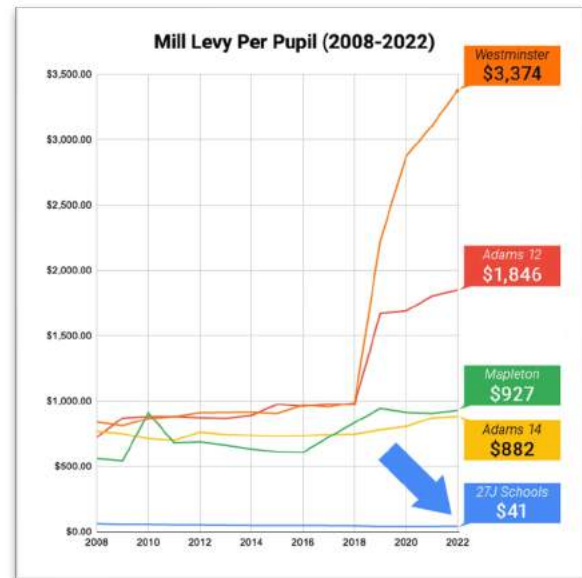
1. **Send Multiple Survey Invitations** – Unlike a mail or “phone only” survey, MMS text invitations are fast, affordable, and can be sent multiple times to residents in multiple languages. Furthermore, the survey invitations can target specific population subgroups based on a region, gender, age, or a U.S. Census socioeconomic data point.
2. **Stronger Respondent Engagement** – People from different demographic, ethnic, and socioeconomic backgrounds are more likely to participate in a survey when the text invitation includes their local government’s logo. Again, this robust engagement method will always have a higher response rate than phone-only or mail-collection methods.
3. **Larger Sample Sizes** – Stronger survey participation leads to larger sample sizes. Larger survey sample sizes have lower margins of error, higher confidence levels, and a more accurate and statistically representative survey.
4. **An Online Survey Can Include More Questions** – It takes less time for a respondent to read and answer questions on their cellphone, desktop, or electronic device than responding to a paper survey or listening to an interviewer read questions and record responses. Therefore, online surveys can include more questions without an increase in respondent fatigue.
5. **A Trustworthy Communication from the City** – An MMS text survey invitation from a government entity is a professional and trustworthy communication that respondents trust and appreciate. Moreover, it strengthens and enhances the government’s brand and image among its residents.



- 6. Add Images to Enhance the Respondent Experience** – Another strength of MMS text survey data collection is the ability to include images. Images can improve the respondent experience and empower government entities by sharing information that otherwise would be difficult to convey. We have used images in our surveys for various governments, school districts, and special district survey projects. Following are two examples of how our team has used images to provide survey respondents with an enhanced information experience.

27J Schools 2022 Ballot Measure Survey

This image compared the mill levy funding per pupil over time to other local school districts. This information was very effective in informing likely voters of the dramatic difference in pupil funding among school districts in the Brighton area.



Commerce City ARPA Funding Survey

This image provided examples of Bridge Housing for families and individuals experiencing homelessness. These images helped Commerce City staff push back on negative assumptions that the city's housing developments were likely to look like scary "dorm-style" housing.

Surveying Residents Experiencing Homelessness or Without Internet

In addition to MMS text survey data collection, our team is experienced in working closely with local government staff to interview hard-to-reach populations. This includes individuals who are experiencing homelessness, undocumented residents, Spanish-speaking-only populations, and people without internet access or who do not own a cell phone. We help staff who work and care for these communities to engage them using an electronic device.

Provide a Pleasant Way to Answer Open-Ended Verbatim Questions

Another advantage of our survey methods compared to Polco's is the ability for residents to respond to open-ended questions in an easy, pleasant manner. Qualitative response data is vital in accurately measuring and understanding resident opinions. However, Polco's paper surveys fail to meet that standard. Do you think the question below will accurately capture a respondent's thoughts and opinions from hand-written data? Our approach allows respondents to speak to their electronic devices to share their opinions.

16. What are the top three things you value most about living in Windsor?

1. _____
2. _____
3. _____

We Use ChatGPT to Provide Our Clients the Best Qualitative Analysis

Again, our data collection methods allow residents to respond to open-ended questions in an easy, pleasant manner. In addition, qualitative response data is vital in accurately measuring and understanding opinions. In the past, we would utilize word clouds and sentiment analysis to analyze and understand open-ended response data. Now, our team uses the powerful capabilities of Chat GPT to summarize hundreds of open-ended responses accurately and more efficiently.



Magellan Strategies Community Survey Benchmark Comparisons

Our community surveys always include "benchmark comparisons" to communities with similar population and demographic characteristics. For example, we compared the results

Glenwood Springs Quality of Life Measurements Compared to Similar Colorado Communities (Excellent and Good Rating Combined)								
Quality of Life Aspects	Glenwood Springs	Steamboat Springs	Estes Park	Rifle	Monument	Cañon City	Wellington	Fruita
Overall quality of life	74%	91%	75%	58%	N/A	59%	N/A	93%
A place to live	80%	94%	79%	N/A	87%	70%	71%	N/A
A place to raise a family	70%	90%	62%	N/A	83%	N/A	69%	N/A
A place to retire	49%	80%	73%	N/A	68%	69%	43%	N/A
A place to work	47%	52%	42%	N/A	23%	N/A	N/A	N/A
Overall value of services	56%	74%	56%	37%	64%	26%	N/A	65%

of our 2021 Glenwood Springs Community survey to seven similar Colorado communities in size and region (rural and mountain).

Why Compare Mequon Results to Dallas or a Village in Vermont?

We do not provide national benchmark comparisons to cities, counties, towns, and villages across the United States. To be honest, we fail to see the value of comparing Mequon's community survey results to large urban cities such as Austin, Baltimore, Dallas, and Philadelphia or small towns and villages with less than 5,000 population like Yountville City in California, Unalaska City in Alaska, Orange Village, Ohio, and Davenport City, Florida. However, we see value in comparing Mequon's survey results to cities of similar size and urban/rural characteristics in Wisconsin and other midwestern states.

Participate in the Glenwood Springs 2021 Community Survey

To experience one of our community surveys, click the link or scan the QR code below. Using MMS text data collection and working with staff to promote the survey on its social media channels, we interviewed 861 residents among a population of 5,500 individuals in Glenwood Springs.



<https://bit.ly/3xIX00O>

Participate in the Town of Gypsum 2022 Community Survey

Again, to experience our community survey, click the link or scan the QR code below. Before working with our team, Gypsum had not attempted a community survey in many years. Using MMS text survey data collection methods and working with staff, the survey completed 467 interviews among an adult population of about 5,800 residents.



<https://t.ly/2kAMW>

Using a Mequon Voter File for Stronger Community Engagement

We use current, cellphone-enhanced voter registration databases and U.S. Census population estimate data to weigh our survey data to ensure it is demographically representative of the adult resident population. There are other benefits of using a current voter file to engage residents than using a list of residential addresses from the U.S. Postal Service.

First, the voter file contains accurate age, gender, and location information, which helps us direct our MMS text survey invitations. This is very helpful when our online platform informs us if a resident subgroup is above or below their interview quota goal in real time.

Second, we can append cell phone numbers and U.S. Census socioeconomic data to the voter file. This helps us target MMS text survey invitations toward hard-to-reach populations of Spanish-speaking only residents, households with high poverty rates, or lower income levels.

Raising Awareness and Providing a Draft Public Communication

When we manage a community survey, we provide communication staff with a draft public communication document to help them promote the survey through email, the media, and social media channels.

In addition, we provide survey QR codes that can be posted and distributed in government buildings and public meeting places.

Click the link below to view our draft public communication for the Town of Gypsum's 2022 community survey.

<https://t.ly/y99Nr>



Community Survey Project Timeline

On average, our community survey projects take 40 to 50 days to complete, and our ballot measure surveys take about 30 days from start to finish. However, we can complete a

Community Survey Project Phase							
Estimated Number of Days (44 total)	1	21	2	15	2	8	5
Initial Survey Discussion							
Survey questionnaire development & design							
Survey public communication & awareness phase							
Survey data collection phase (MMS Text & promotion)							
Deliver survey toplines & crosstabs							
Deliver survey verbatims, presentation & summary							
Present survey findings to staff, Commissioners, and public meeting (we assume 3 separate meetings)							

Proposal of Community Survey Research Services to the City of Mequon, Wisconsin
March 6th, 2024

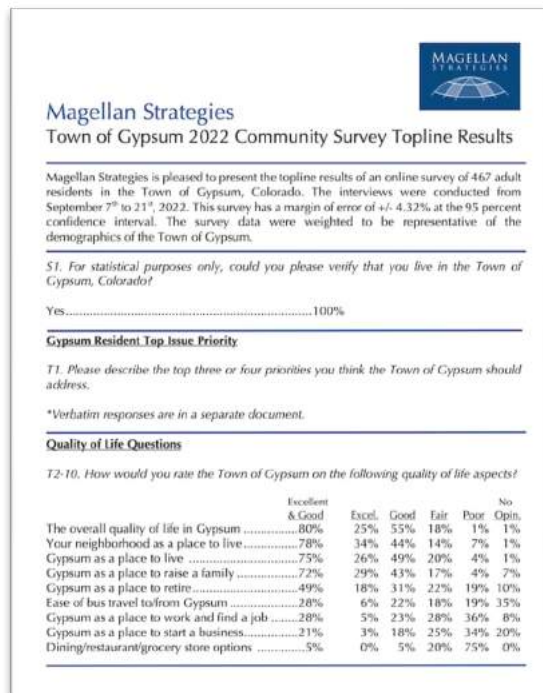
community survey project in less than 40 days if the client is in a rush. The questionnaire design phase always takes the longest to complete. The following table shows each survey phase and the number of days to complete it.

Magellan Strategies Survey Deliverables

Our survey research project deliverables include a topline document, a PowerPoint presentation, open-ended verbatim responses, and crosstabs. Please click the links below to review and download a specific survey deliverable from our 2023 City and County of Broomfield Police and Library ballot measure survey.

Survey Topline Document

<https://t.ly/PbORR>



Magellan Strategies
Town of Gypsum 2022 Community Survey Topline Results

Magellan Strategies is pleased to present the topline results of an online survey of 467 adult residents in the Town of Gypsum, Colorado. The interviews were conducted from September 7th to 21st, 2022. This survey has a margin of error of +/- 4.32%, at the 95 percent confidence interval. The survey data were weighted to be representative of the demographics of the Town of Gypsum.

51. For statistical purposes only, could you please verify that you live in the Town of Gypsum, Colorado?

Yes.....100%

Gypsum Resident Top Issue Priority

T1. Please describe the top three or four priorities you think the Town of Gypsum should address.

*Verbatim responses are in a separate document.

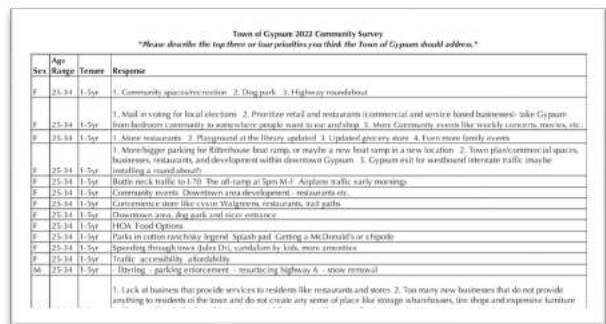
Quality of Life Questions

T2-10. How would you rate the Town of Gypsum on the following quality of life aspects?

	Excellent & Good	Excel.	Good	Fair	Poor	No Opin.
The overall quality of life in Gypsum.....	80%	25%	55%	18%	1%	1%
Your neighborhood as a place to live.....	78%	34%	44%	14%	7%	1%
Gypsum as a place to live.....	75%	26%	49%	20%	4%	1%
Gypsum as a place to raise a family.....	72%	29%	43%	17%	4%	7%
Gypsum as a place to retire.....	49%	18%	31%	22%	19%	10%
Ease of bus travel to/from Gypsum.....	28%	6%	22%	18%	19%	35%
Gypsum as a place to work and find a job.....	28%	5%	23%	28%	36%	8%
Gypsum as a place to start a business.....	21%	3%	18%	25%	34%	20%
Dining/restaurant/grocery store options.....	5%	0%	5%	20%	75%	0%

Survey Verbatim Responses

<https://t.ly/voHlf>



Town of Gypsum 2022 Community Survey
Please describe the top three or four priorities you think the Town of Gypsum should address.

Sex	Age Range	Tenure	Response
F	25-34	1-5yr	1. Community specific issues 2. Dog park 3. Highway roundabout
F	25-34	1-5yr	1. Need in voting for local elections 2. Prioritize retail and restaurants (commercial and service based businesses) like Gypsum from business community to somewhere people want to eat and shop 3. More community events like weekly concerts, movies, etc.
F	25-34	1-5yr	1. More restaurants 2. Playground at the library updated 3. Updated grocery store 4. Even more family events
F	25-34	1-5yr	1. More/bigger parking for RiteAid/Target, or maybe a new food court in a new location 2. More plans/communal spaces, businesses, restaurants, and development within downtown Gypsum 3. Gypsum exit for westbound interstate traffic (maybe installing a roundabout)
F	25-34	1-5yr	1. Better walk/bike to 150 The off ramp at 150th St. 2. Airport traffic early morning.
F	25-34	1-5yr	Community events. Downtown area development. Restaurants etc.
F	25-34	1-5yr	Convenience store like a 7-Eleven, Walgreens, restaurants, retail shops.
F	25-34	1-5yr	Downtown area, dog park and more entrance.
F	25-34	1-5yr	IMHO: Food Options.
F	25-34	1-5yr	Parks in cottonwood/aspens/cedar. Splash pad. Getting a McDonald's or a burger.
F	25-34	1-5yr	Spending through town (like D's), conducting by both, more amenities.
F	25-34	1-5yr	Traffic, accessibility, sustainability.
M	25-34	1-5yr	Drinking - parking enforcement - resurfacing highway 6 - snow removal
			1. Lack of business that provide services to residents like restaurants and stores 2. Too many new businesses that do not provide anything to residents of the town and do not create any sense of place like storage warehouses, tire shops and expensive furniture

Survey Crosstabs

<https://t.ly/MfdAK>

		Gender										Age-Gender										Race-Ethnicity																			
		Male					Female					18-24					25-34					35-44					45-54					55-64					65+				
		TOTAL	N	%	95% CI	TOTAL	N	%	95% CI	TOTAL	N	%	95% CI	TOTAL	N	%	95% CI	TOTAL	N	%	95% CI	TOTAL	N	%	95% CI	TOTAL	N	%	95% CI	TOTAL	N	%	95% CI	TOTAL	N	%	95% CI				
TOTAL		467	219	47	43	152	109	79	43	103	75	43	112	12	100	75	45	146	48	75	158	50	11	558	50	11	108	100	100	100	100	100	100	100	100						
Excellent		117	55	25	20	40	25	17	22	35	18	33	26	17	21	21	23	20	18	20	25	12	5	30	27	6	10	10	10	10	10	10	10	10	10	10					
Good		251	55	26	31	26	23	21	24	23	22	23	22	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23					
Fair		128	28	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14					
Poor		12	3	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1					
No Opinion		4	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0					

Survey Presentation

<https://t.ly/CQJQ4>



Magellan Strategies
4800 Aspen Creek Drive | Broomfield, CO | 80023
MagellanStrategies.com | 303-861-8585

Factors That Influence the Cost of a Survey Project

Two primary factors influence the cost of a survey. The first factor is the data collection method (mail, phone, or text). However, we do not attempt phone interviews for community surveys because they are too long. We also do not offer mail surveys for the reasons listed earlier in this proposal. In addition, they are slow, expensive, prone to keypunching errors, and overwhelmingly biased toward older, white respondents.

The second factor influencing the cost of a survey is the number of questions and, to some degree, the kind of questions. Open-ended verbatim responses can also add to the cost because it takes more time to process that data and adds time to completing the survey.

City of Mequon Community Survey Pricing

If a survey exceeds 75 questions or is between 25 and 75 questions, we charge a fee agreed upon by the government organization.

The “Total Community Survey” Pricing

75 questions and a goal of 1,200 interviews \$17,500

The “Condensed Community Survey” Pricing

25 questions, 1,200 interviews..... \$10,000

Summary

We look forward to discussing our proposal with Assistant City Administrator Justin Schoenemann, Executive Assistant Carrie Enea, and the City of Mequon leadership team in the very near future. Following is a summary of six community survey projects with reference information and our team biographies.

City of Manitou Springs 2023 Community Survey

This 74-question community survey interviewed 515 residents in a community of about 4,700 people. In addition to measuring opinions of city services, programs, budget priorities, and quality of life, the survey included questions related to the city’s master plan. Reference: Public Information Officer Alex Trefry, atefry@manitouspringsco.gov, (719) 306-2884.

City of Salida 2022 Community Survey

This 25-question community survey interviewed 1,222 residents in a community of 5,100 adult residents. Reference: City Manager Christy Doon, christy.doon@cityofsalida.com, (719) 539-4555.

Town of Gypsum 2022 Community Survey

This community survey interviewed 1,219 residents in a community of 5,100 adult residents. Reference: Communications Manager Taylor Slauch, taylor@townofgypsum.com, (970) 524-1723.

Town of Monument 2021 Community Survey

This 76-question community survey interviewed 846 residents, measuring opinions of town services, programs, budget priorities, and aspects of quality of life. In addition, the survey established opinion benchmarks to measure town performance of services, initiatives, programs, and amenities. Reference: Town Manager Mike Foreman, (719) 322-3043. mforeman@tomgov.org.

City of Glenwood Springs 2021 Community Survey

This community survey included 77 questions and interviewed 861 residents. The survey measured opinions of city services, programs, budget priorities, and aspects of quality of life. The survey established opinion benchmarks of the performance of city services and amenities. Reference: Senior Project Manager Jennifer Ooton, City of Aspen, (970) 429-2756, jenn.ooton@aspen.gov.

Town of Wellington 2021 Community Survey

The Town of Wellington invested in an abbreviated community survey with 34 questions. Again, our MMS text survey invitation data collection approach yielded a whopping 737 interviews in a community of 6,900 residents. Reference: Patty Garcia, Town Manager, (970) 568-3381 x 202, garciapa@wellingtoncolorado.gov.

The Magellan Strategies Team

David Flaherty, CEO and Founder

David Flaherty is the CEO and founder of Magellan Strategies. David has spent his 31-year career designing and conducting hundreds of survey research projects measuring resident and voter opinion. He is an expert public opinion pollster, focus group moderator, and voter data analyst.



Before forming Magellan Strategies in 2006, David worked in Washington, DC, for fourteen years. During that time, he learned the art of voter opinion research, questionnaire design, message development, and voter demographic trends while working at the Republican National Committee, the U.S. House of Representatives (Subcommittee on the Census), Americans for Prosperity, and a small government relations firm.

For the past sixteen years, David has led the Magellan team's growth into providing high-quality, professional survey research services to local governments, school districts, and special districts. He is very proud to have helped more than 100 Colorado governments achieve voter approval for a wide array of funding ballot measures.

David is a native of Wellesley, Massachusetts, and is a 1991 graduate of the University of Delaware. He lives in Broomfield, Colorado, with his wife, Jennifer, and their two sons, Jack

and Bobby. David is an active skier, golfer, mountain biker, and avid reader of political history.

Ryan Winger, Director of Survey Data Analysis and Polling Project Manager

Ryan Winger has been with Magellan Strategies since 2007 and wears several “hats” in the firm. Ryan manages most of our school district and community survey projects. He also manages our Colorado resident and voter registration databases. Ryan is also an experienced local ballot measure campaign consultant. He is an expert in Facebook and “IP targeting” advertising strategies to help school districts, government, and special district clients run more effective ballot measure campaigns.



Ryan is a graduate of the University of Colorado with a degree in Political Science. He resides in Frederick with his wife, Vicki, and their three children, Emmalyn, Easton, and Everly. Ryan is a huge college basketball fan and supporter of the Kansas Jayhawks.

Courtney Sievers, MPA, Director of Survey Research

Courtney Sievers has been with Magellan Strategies since 2009. Courtney is the point person for many of our ballot measure and policy survey research projects. She has managed hundreds of our resident and voter opinion research projects in over 20 states. In addition, she is an expert in SPSS, Uncle, and R. She also has extensive experience with focus group projects, discussion guide design, and sentiment analysis.



Courtney holds a Bachelor's Degree in Mathematics with a Concentration in Statistics from Colorado Mesa University and a Master of Public Administration Degree from the University of Colorado Denver. Courtney is a native of Fruita, Colorado. She and her husband, Jake, live with their daughter Riley in Arvada. In her spare time, she loves to play soccer and ski.

Katie Witt, MPA, Polling Project Manager

With over 13 years of experience in public policy, local government, and community development, Katie Witt is a passionate problem solver and community champion. Her mission has always been to unite people and organizations, forging powerful connections to achieve shared goals and create lasting change.



Katie's career in public policy and local government led her to become the Mayor of Kaysville City, Utah. In that role, she served as a bridge between her community and the larger world of government. She led a dedicated

team and provided guidance and support to help them shine. Together, they tackled ambitious projects, from bringing high-speed internet options to the entire city to remodeling city hall to accommodate the community's growing needs. And when the COVID-19 pandemic hit, she spearheaded their response, ensuring the safety and well-being of residents and businesses.

Before living in Kaysville City, she proudly served as a City Council Member in Longmont, Colorado. There, she was involved in various special projects and even took on leadership roles at the regional and national levels. These experiences allowed her to cultivate her skills and passion for public service. Katie holds a bachelor's degree in political science from the University of Colorado and a master's in public administration from the University of Utah. In addition, she is a constant learner and has pursued professional development in grant writing, public participation, an outward mindset, and career development. Katie lives in Kaysville City, Utah, with her husband.



Proposal to Conduct a Community Survey for the City of Mequon, Wisconsin

March 6th, 2024

Submitted by:
ETC Institute

p. 913-813-1011
f. 913-829-1591

725 W. Frontier Lane
Olathe, Kansas 66061

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Cover Letter

Request for Proposals 2024 City of Mequon Community Survey

Dear Ms. Carrie Enea, Executive Assistant – Communications:

ETC Institute is pleased to submit a proposal to administer a Community Survey for the City of Mequon, Wisconsin. In response to your request, you will find a proposal from ETC Institute.

ETC Institute is Recognized as a National Leader in the Design and Administration of Market Research for Local Governments. Since 1982, ETC Institute has completed research projects for organizations in 49 states. ETC Institute has designed and administered more than 4,000 statistically valid surveys and our team of professional researchers have moderated more than 1,000 focus groups and 2,000 stakeholder interviews. During the past five years alone, ETC Institute has administered surveys in more than 700 cities and counties throughout the United States. ETC Institute has also conducted research for more large U.S. cities than any other firm.

ETC Institute Has the Ability to Compare Your Results with Other Communities. Our firm maintains national and regional benchmarking data for resident surveys that provide comparative norms for over 90 local governmental services. Unlike some comparative databases that use comparative data from secondary sources, ETC Institute's data is from surveys that were all administered by ETC Institute. This ensures that your results are directly comparable to communities of a similar size. ETC Institute's benchmarking database only includes data from surveys that have been administered during the past three years. This ensures our comparative norms are truly representative of existing attitudes and expectations regarding the delivery of local governmental services.

ETC Institute Has Developed the Most Innovative Analytical Tools to Help the City Understand and Utilize Survey Data. Today, City officials have limited resources which need to be targeted to activities that are of the most benefit to their citizens. Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance to residents; and (2) to target resources toward those services where citizens are least satisfied. The Importance-Satisfaction (I-S) rating is a unique tool that allows public officials to better understand both of these highly important decision-making criteria for each of the services they are providing. The I-S rating is based on the concept that organizations will maximize overall citizen satisfaction by emphasizing improvements in those service areas where the level of satisfaction is relatively low and the perceived importance of the service is relatively high. This analysis tool helps our clients identify specific drivers of satisfaction.

ETC Institute also has the capability of generating maps of the survey results. GIS Mapping is used to show how respondents in different areas of a community rate services. By pinpointing problem areas our clients have the ability to directly address issues where they are the biggest concern.

Attachment: Mequon 2024 Community Survey Proposal (9517 : Vendor Selection for Community Survey)

ETC Institute Guarantees That We Will be Very Responsive to Your Needs. ETC Institute administered a survey to organizations that had used our services. Among the 150 clients who responded to the survey, 100% were satisfied with the service they received and 100% indicated they would recommend our firm to other organizations. The reason ETC Institute's customer satisfaction levels are so high is due to our commitment to the needs of our clients.

ETC Institute's Most Senior Professionals Will Be Managing the Project on a Daily Basis. By having experienced, senior personnel lead the day-to-day management of each task, ETC Institute will ensure that your organization receives the highest level of service possible and that high standards of quality control are maintained. The City will receive priority resources from our firm, and we will ensure the project is accomplished according to your schedule. To ensure your success, we have assembled a team of the very best market researchers and experts to assist with the design of surveys, the development of the sampling plans, the administration of the surveys, and the analysis of the data collected. Our team has unparalleled expertise in project management, survey design, sampling, methodology, and survey administration.

If ETC Institute is selected for this project we will do everything possible to ensure the survey meets the high expectations you have set for this project. We appreciate your consideration of our proposal and look forward to your decision. If you have any questions, please do not hesitate to call us at (816) 813-1011.

Sincerely,



Robert Heacock
Senior Project Manager, ETC Institute
725 W Frontier Lane, Olathe, Kansas 66061
816-813-1011
Robert.heacock@etcinstitute.com
www.etcinstitute.com

Company Profile

ETC Institute is a market research firm that specializes in the design and administration of market research for governmental organizations. Our major areas of emphasis include resident satisfaction surveys, parks and recreation surveys, community planning surveys, business surveys, transportation surveys, employee surveys, voter opinion surveys, focus groups, and stakeholder interviews. ETC Institute has 49 full-time employees. The work for this project will be performed at ETC Institute's home office in Olathe, KS.

Specific Approach, Sample Reports, and Management Plan

Phase 1: Design the Survey and Develop Sampling Plan

Task 1.1 Design the Survey

Once selected for the project, ETC Institute will meet with the City by phone/video conference to discuss the goals and objectives for the project. ETC Institute will review surveys that have previously been administered for the City. To facilitate the survey design process, ETC Institute will provide the City with sample surveys created for similar projects. ETC Institute will discuss with the City which questions should be benchmarked with past or for future surveys. Based on a thorough discussion with the City, ETC institute will develop a first draft of the survey.

ETC Institute will work closely with City staff to ensure the City's input is utilized to create a survey that best fits the needs of the project. It is anticipated that 3-4 drafts of the survey will be prepared before the survey is approved by the City. Staff will be given the opportunity to review the survey instrument before it is administered and will be asked to provide final approval before distribution begins. Once the survey instrument is approved, ETC Institute will conduct an internal pilot-test to ensure the survey instrument is understood as designed.

Task 1.2 Develop the Sampling Plan

As a part of Task 1.2, ETC Institute will develop and finalize a sampling plan. ETC Institute will guarantee a minimum of 400 completed surveys. A sample of 400 completed surveys will provide results that have a margin of error of +/- 5% at the 95% level of confidence at the City level. The results would be statistically valid City-wide. If ETC Institute receives more than 400 completed surveys, those additional surveys will analyzed and included as part of the survey findings report for no additional fee.

Task 1 Deliverables

ETC Institute will deliver the approved survey instrument and a description of the finalized sampling plan.

Phase 2: Administer the Survey

Task 2.1 Administer the Survey

ETC Institute will administer the statistically valid survey through a combination of mail, online, and phone. ETC Institute recommends this hybrid approach to ensure that diverse populations are well represented, and to maximize the overall response rate. Specifically, ETC institute will do the following:

Survey Administration Procedures

- Surveys will first be mailed to each of the residents in the sample frame. Only one survey per household will be sent. Printing of the surveys and postage-paid envelopes will be provided by ETC Institute. The City will

provide ETC Institute with a cover letter for the mail survey. A portion of the cover letter can be translated into other languages which will inform non-English speaking residents about the survey and instruct them how to participate. The cover letter will contain a link to an online version of the survey. Residents who receive the survey will have the option of returning the printed survey by mail or completing it on-line.

- A toll-free number to assist respondents with the survey will be operational during survey administration. This will allow residents to contact ETC Institute if they have questions about the survey.
- ETC Institute will follow-up with residents who receive the mailed survey by sending texts, postcards, and a second mailing (if needed) to maximize participation in the survey. ETC Institute will continue following up with households until a minimum of 400 surveys are completed.
- ETC Institute will promote awareness of the survey using social media ads on Facebook and Instagram to encourage participation.
- All respondents who complete the survey online will be required to provide their home address when they submit their survey. ETC Institute will match addresses from respondents who complete the survey online to the addresses that were selected for the random sample to ensure the participant is part of the random sample. This will ensure that the survey results are statistically valid.
- ETC Institute will record the home address of survey respondents. These addresses will be geocoded to the latitude and longitude coordinates to allow ETC Institute to map the results of selected questions on the survey.
- ETC Institute will monitor the distribution of the sample to ensure that the sample reasonably reflects the demographic composition of the City with regard to geographic dispersion, age, gender, race/ethnicity and other factors.
- ETC Institute will send the City a link to an online survey that any resident can fill out (non-random sample). The City can promote the link on their website, through social media, and/or at public meetings. The results from the non-random sample will be processed and analyzed in a separate database from the 400 surveys from the random sample. The survey results from the non-random sample will not be included as part of the final report based on the 400 surveys from the random sample, but ETC will provide the City with the survey results of the non-random sample as tabular data.

Data Management and Quality Control

ETC Institute has an ongoing quality control and assurance program in place. The program has been developed and refined through our experience with hundreds of studies that involved the design and administration of surveys, focus groups, and other data collection services.

Our quality assurance program is directly monitored by the company owner and CEO, Christopher Tatham. The program is designed to give clients error free results, and all employees at ETC Institute are directly involved in the program. The quality control and assurance methods used by ETC Institute have been reviewed by the United States Office of Management and Budget.

Following the completion of survey administration, ETC Institute will perform data entry, editing, and verification of all survey responses. The data processing system used by our firm for this study will alert data entry personnel with an audible alarm if entries do not conform to predetermined specifications. Data entry fields will be limited to specific

ranges to minimize the probability of error. A supervisor will match at least 10% of the records in the database against the corresponding survey to ensure that all data entry is accurate and complete.

Task 2 Deliverables

ETC Institute will deliver a copy of the overall results to each question on the survey as tables, this deliverable will include any open-ended responses from the survey. ETC Institute will provide the non-random survey results separately from the random sample survey results.

Phase 3: Survey Analysis and Reporting

Task 3.1 Analyze the Survey Results

The analysis tools that will be included in this project are proved on the following pages. These analysis tools will be provided for the random sample (statistically valid) survey results.

Task 3.1.1 Importance-Satisfaction Analysis

By using specific design features, ETC Institute can utilize the City's survey data to create an Importance-Satisfaction Rating (I-S Rating). The I-S Rating is based on the concept that public agencies will maximize overall satisfaction 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. More than 250 governmental agencies currently use ETC Institute's I-S Ratings. The ratings allow governmental organizations the ability to assess the quality of service delivery. During the past 35 years, ETC Institute has continually refined the analysis to maximize its usefulness as a decision-making tool.

Importance-Satisfaction Rating (2021)						
Major Categories of City Services						
City of Elgin, IL						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (I-S > 0.20)						
Maintenance of City streets, sidewalks & infrastructure	58.7%	1	56.5%	10	0.2553	1
High Priority (I-S = 0.10-0.20)						
Enforcement of local codes & ordinances	37.6%	2	56.7%	9	0.1628	2
Medium Priority (I-S < 0.10)						
Quality of parks & recreation programs & facilities	33.6%	4	76.3%	2	0.0796	3
Access to info about City programs, services & alerts	18.2%	6	66.8%	6	0.0604	4
Quality of police, fire & ambulance services	35.2%	3	84.5%	1	0.0546	5
Quality of customer service provided by the City	15.0%	7	64.0%	8	0.0540	6
Quality of trash & yard waste services	18.8%	5	74.6%	4	0.0478	7
Quality of the City's stormwater management	10.6%	8	65.0%	7	0.0371	8
Quality of water utility services	10.4%	9	74.9%	3	0.0261	9
Quality of billing services provided	5.2%	10	71.3%	5	0.0149	10

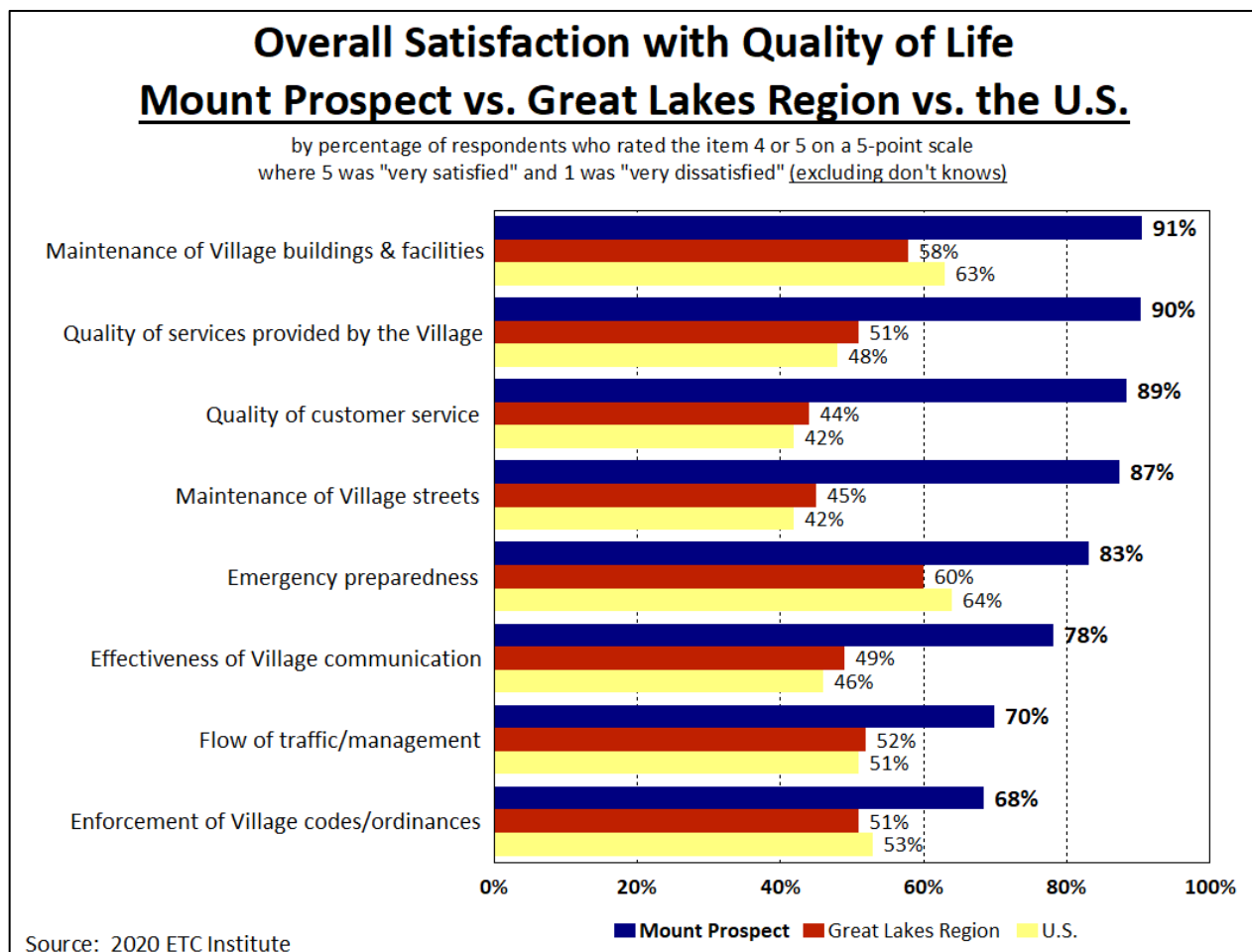
The table on the previous page offers an example of the I-S Rating from the City of Elgin's Community Survey. The table shows that the City of Elgin could maximize resident satisfaction with City services by investing in maintenance of streets/sidewalks/infrastructure and enforcement of codes and ordinances.

Task 3.1.2 Benchmarking Analysis

Benchmarking is a highly effective tool that helps decision-makers interpret the meaning of community survey data. If 64% of residents are satisfied with communication with residents, is that good or bad? Without comparative data, it is difficult to know. **ETC Institute maintains national, regional, and population-based benchmarking data for more than 90 types of local governmental services.** Benchmarking can help local governments understand how their results compare to similar communities.

For example, 78% of residents in the City of Mount Prospect were satisfied with the effectiveness of City communication with the public. Without comparative data, City leaders might have wondered whether 78% was an acceptable rating. As the chart on the following page shows, 78% is an excellent rating for this item. Based on the results of a national survey conducted by ETC Institute, the average satisfaction rating for the effectiveness of communication with the public was 49% for residents in the Great Lakes Region, and 46% for residents nationwide.

ETC Institute can provide benchmarking data for Wisconsin communities, as well as communities of comparable size to the City of Maquon. ETC Institute will work with the City to determine which benchmarking comparisons best meet the goals and objectives for the project.

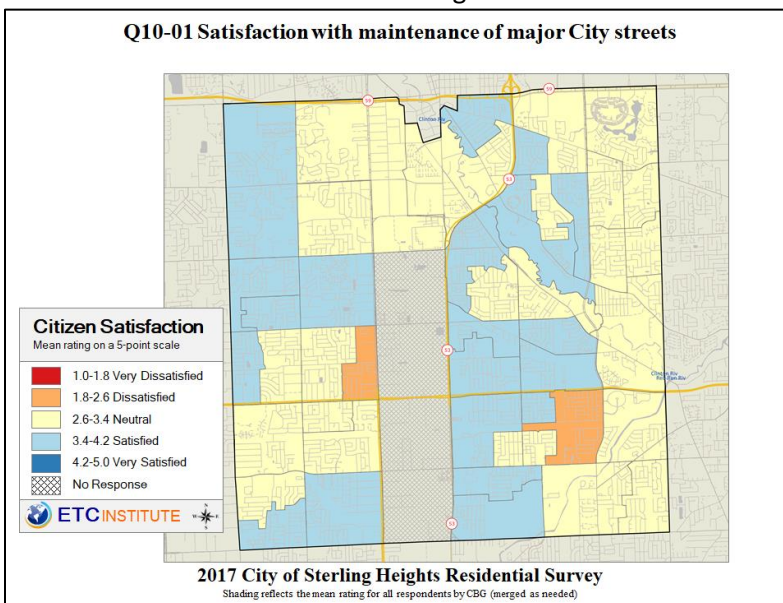
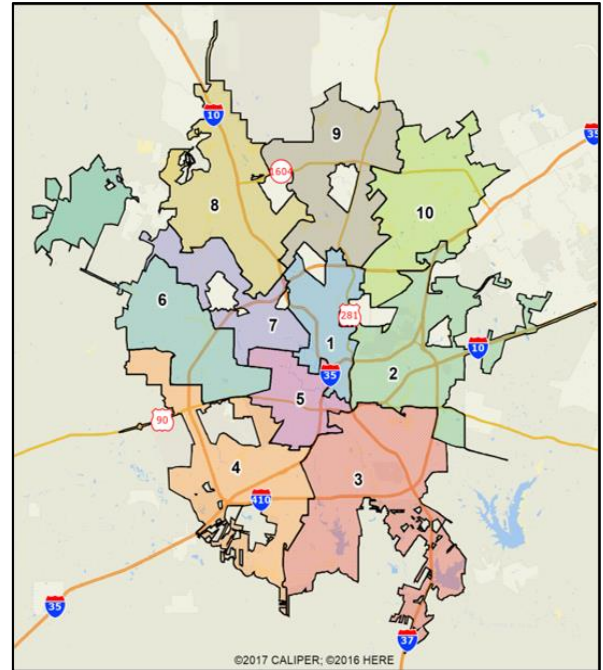


Task 3.1.3 GIS Mapping

ETC Institute staff has successfully geocoded survey results for over 300 market research projects within 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 customer satisfaction analysis and other planning and modeling efforts across the country.

The map to the right identifies the 10 council districts in the City of San Antonio that were surveyed. The GIS Maps our team creates provide our clients with a visual representation of the areas of the City that are surveyed and can be used as an extremely useful communication tool with City leaders and elected officials.

Our GIS Maps not only provide our clients with a visual representation of the areas that are surveyed, but they can also show areas where residents have the greatest and least amount



of satisfaction with various services. The map below shows levels of satisfaction with the maintenance of major City streets in the City of Sterling Heights, MI. Areas in blue identify areas with high satisfaction, areas in yellow are neutral, and areas in orange and red indicate high levels of dissatisfaction.

ETC Institute will prepare maps showing the results of specific questions on the survey by census block group (or other geographic characteristics decided upon by the City). ETC Institute will geocode the home address of survey respondents to the block latitude and

longitude coordinates, this ensures the exact location of a respondent's household is not revealed. This will allow our team to generate maps that visually show how well the City is delivering services to various parts of the City. GIS maps continue to be an effective tool for communicating the results of the survey to elected officials and the public.

Task 3.1.4 Cross-Tabulations

Based on a discussion with City staff, ETC Institute will create cross-tabulations of questions on the survey with key demographic variables (i.e., age, gender, race/ethnicity, income, number of years lived in the City, geographic characteristics, and others). ETC Institute will work with City staff to understand the significant differences found in the cross-tabulations among the key demographic groups.

Task 3.2 Prepare a Final Report

Following a meeting with the City project team, ETC Institute will develop a written report utilizing the analysis tools found in Task 3.1. The report will provide a thorough analysis of the data, including a summary of the results. The report will describe the methods used in conducting the survey and the number of respondents surveyed. The full report will also include the following:

- An executive summary that includes the description of the survey methodology and major findings,
- Charts and graphs for all questions on the survey, including comparisons to previous surveys
- Importance-Satisfaction Ratings that identify priorities for improvement,
- Benchmarking analysis that shows how the City compares to other communities,
- GIS maps that show select questions on the survey as a map,
- Cross-tabulations that break down the results by key demographic and geographic variables,
- Data tables showing the results for all questions on the survey, and
- A copy of the survey instrument.

Sample reports can be found here: https://etcinstitute1-my.sharepoint.com/:f:/g/personal/jason_morado_etcinstitute_com/Evhn_DBIk9MmKRAWqY4Aj8Bx2g0CymiQGKA_L50YhNVVgg?e=n17gMC

Task 3.3 Deliverables

ETC Institute will deliver an electronic copy of the final report. ETC Institute can also provide the raw data in an Excel database, or other format as requested by the City. A project manager from ETC Institute will make a presentation of survey results via webinar, or in person as an optional service.

Staffing Plan

The ETC Institute team was assembled based on a thorough review of the requested scope of services. The staff members selected to fill key roles had to have extensive experience that exceeded the technical requirements for this project. The core skills that were identified are listed below:

- Strong project management skills and experience with the management of research studies for municipalities
- Statistical sampling expertise
- Knowledge of local government organizations
- The ability to analyze and interpret survey findings

All services will be performed in-house by ETC Institute staff. The key members of the project team who will be assigned to the project are listed below.

- **Robert Heacock:** Mr. Heacock will assume the role of Project Manager. Mr. Heacock has more than 7 years of experience in survey administration, development, supervision and research analysis. Mr. Heacock also brings a depth of experience and perspective with over 29 years of work experience in state and local government, including the role of city manager. While working at ETC Institute Mr. Heacock has worked on community and business survey projects and has led and assisted in the coordination and facilitation of focus groups.

- **Jason Morado:** Mr. Morado will assume the role of Assistant Project Manager. Mr. Morado has more than 20 years of experience in the design, administration, and analysis of community market research. In his current role as Vice President and Director of Community Research at ETC Institute, he leads community market research projects across the country. He has served as the project manager on community research projects for over 300 local government organizations throughout the United States, includes numerous communities throughout the state of Wisconsin.
- **Christopher Tatham:** Mr. Tatham will serve as a Senior Consultant and will assist the project managers in the review and design of the survey instrument and final report. Mr. Tatham has managed more than 2,000 community surveys for local governmental organizations throughout the United States. He has conducted community surveys in nine of the 20 largest U.S. cities and 11 of the 20 largest U.S. counties. He has more experience with the design and interpretation of community survey research than anyone in the nation. He excels in using survey data to facilitate consensus about organization priorities. His understanding of local government issues and his expertise make him ideally suited to help the City achieve their goals and objectives for this project. Mr. Tatham currently serves as the CEO of ETC Institute.

Project Schedule

ETC Institute's normal research plan has been designed to complete this project in a three to four month period. This timeframe includes kick-off meetings, survey design, sample plan development, survey administration, analysis and the delivery of the final report. Our understanding is that the City intends to delay data collection until the Spring of 2025, and ETC is comfortable working on the City's timeline.

Month 1

- Design survey instrument
- Finalize sampling plan

Month 2-3

- Data collection begins
- Data collection completed

Month 4

- Draft report submitted for review
- Changes to draft report are discussed
- Final report delivered

Month 4

- Schedule presentation to the City Council

Cost Proposal

ETC Institute will guarantee a minimum of 400 completed surveys. ETC Institute will do our best to maximize your investment in our services. A project manager from ETC Institute can discuss additional pricing options and negotiate

pricing based on the needs of the City. ETC Institute will send regular invoices as project tasks are completed. Our prices are all-inclusive. The table below details the proposed price by task.

Task	number of completed surveys	400
	precision with 95% level of confidence at City level	+/- 5%
Task 1.1	Design the Survey	\$ 1,500.00
Task 1.2	Develop the Sampling Plan	\$ 1,500.00
Task 2.1	Administer the Survey	\$ 12,000.00
Task 3.1	Analyze the Results + Draft Report	\$ 1,500.00
Task 3.2	Final Report	\$ 1,500.00
Task 3.3	Webinar Presentation of Final Report	\$ 500.00
	Interactive Data Dashboard	Included
Total		\$ 18,500.00
Optional Tasks		
	On-Site Visit to Present Final Report (In lieu of Webinar Presentation)	\$ 2,000.00

Interactive Data Dashboard

ETC Institute will develop an interactive data dashboard for the City of Maquon. The dashboard would allow the City to query the full set of survey results in real time anywhere with access to the internet (smart phone, tablet, laptop, PC, etc.). Our interactive dashboards give clients the ability to explore the data and drill-down into the results on-demand in ways that were not previously possible with printed reports and traditional databases.

The dashboard may include the following features:

- **Trends Analysis** showing the results from previous surveys ETC Institute has administered for the City.
- **GIS Mapping** showing the survey results mapped out geographically. The maps will display results for the current year and previous years so the City can see on-demand trends for specific areas in the City.
- **Benchmarking Analysis** showing how the City compares to other communities regionally, nationally, and based on the population of other communities. One of our project managers can discuss the benchmarking options available and help determine which option is best for your project.
- **Priority Analysis** showing the top priorities for the City based on the Importance-Satisfaction ratings. Priorities can be displayed for various demographic and geographic areas using the interactive features of the dashboard.
- **Cross-Tabular Data Analysis** which gives the user the ability to cross-tabulate specific questions on the survey showing how different groups of respondents responded to various questions on the survey.
- A dashboard that ETC Institute created for the City of Kansas City, Missouri resident and business surveys can be viewed by following the link here: <https://etcinstitute.com/directionfinder2-0/kansas-County-missouri/>

Closing

We appreciate your consideration of our proposal and look forward to your decision.



Robert Heacock
Senior Project Manager, ETC Institute

Approved by City of Maquon, WI :

Authorized Signature/Title

Total \$ Cost

Date

Attachment: Mequon 2024 Community Survey Proposal (9517 : Vendor Selection for Community Survey)



Exclusive partners of:



Proposal and Recommendation prepared for Mequon, WI



Updated- Spring 2024

Justin Schoenemann
 City of Mequon
 Assistant City Administrator
 11333 N. Cedarburg Road
 Mequon, WI 53092

Justin,

We are pleased to submit this proposal to the city of Mequon. Polco's core business is the administration of community surveys for local governments. Over the last 25 years, we have conducted more than 1,000 such surveys in more than 500 local governments across the U.S. Polco is the only strategic partner of the International City/County Management Association's (ICMA) to offer survey research to local governments. We have been in partnership with ICMA for over 20 years and conduct training about using citizen surveys to advance community livability.

Polco understands that the city is evolving and is ready for their first round of the National Community Survey to gauge a comprehensive resident opinion regarding the services, activities, and direction of the city Leadership. Polco will work with city staff to develop and administer a survey of residents; analyze the survey responses and report on the results. We will ensure the results of the survey are weighted to reflect the demographic make-up of all adults (18 years old or older) living in the community, so that the results can be generalized to the entire adult population. Additionally, because Polco conducts and collects the most current community surveys from jurisdictions across the country, we have the largest database of current comparative resident opinion of any firm. Conducted with typically no fewer than 300 residents in each jurisdiction, opinions represent over 30 million Americans.

Thank you in advance for your review and consideration.

Sincerely,

James Windisch
 Senior Account Executive
james@polco.us | Direct (608) 609-0274

Attachment: Mequon WI Polco Update March 2024 (9517 : Vendor Selection for Community Survey)



Executive Summary

About Polco

Air Force veterans Nick Mastronardi and Alex Pedersen founded Polco in 2015 out of their passion for public service. They shared a desire to see local governments better utilize technology to foster productive conversations and make data-driven decisions. Nick's experience at Amazon and Alex's at Google, in addition to shared experiences in academia, gave them the expertise they needed to create Polco. They saw how technology had contributed to residents' declining trust in government and increasing polarization and hoped that they could be a part of reversing these concerning trends through technology. From the start, they founded Polco with the mission to improve how governments engage their residents, understand the resident sentiment, and ultimately use this input to make decisions that improve the quality of life for all.



Nick and Alex quickly realized that there were other great practitioners doing innovative work that they could amplify through a partnership with Polco. In 2019, National Research Center (NRC) joined Polco to set a new standard for survey research. NRC was the leading provider of community surveys for local governments across the country for 25 years, and the merger with Polco combined NRC's extensive library of professional local government surveys, a database of local government performance, and survey research expertise with Polco's technical capabilities for enhanced communication and engagement. Today, Polco is headquartered in Middleton, Wisconsin, with over 75 employees across the country, including an office in Boulder, Colorado.

Balancing Act joined Polco in 2023, bringing best-in-class budget and housing simulations, prioritization tools, and Taxpayer Receipts to Polco's community engagement platform. Balancing Act has provided these capabilities to local, state, federal, and academic institutions around the world. The core of the Balancing Act suite is the budget simulation. This easy-to-set-up, interactive tool is the best way to communicate financial information to residents and get their informed feedback. Balancing Act's online housing simulation changes the participation dynamic in planning and zoning by putting residents in the shoes of decision-makers and asking them to help solve the problem. Prioritize gathers stakeholder preferences on budgeted projects with a unique dual approach that allows users to make selections and then rank order them. The resulting data provides deeper insight to support decision-making within a fixed budget or one-time expense such as stimulus funds. Finally, the Balancing Act Taxpayer Receipt is an easy, effective way to demonstrate to residents that their money is being put to good use. Residents anonymously input data to generate a customized estimate of taxes paid.

Polco has received the highest levels of endorsement from the International City/County Managers Association (ICMA), the National League of Cities (NLC), and the Government Financial Officers

Association (GFOA). Together, these organizations comprise thousands of city and county managers, council members, elected officials, and government finance professionals.

Polco continues to grow as we add additional capabilities to our community engagement platform. Our suite of tools ensures communities engage with residents and receive the insights necessary to optimize their resources and deliver the highest level of services to residents.

Our team's combined expertise has produced a robust digital engagement platform to gather critical information from community stakeholders, assess their needs, and monitor resident satisfaction and government performance. The platform includes three modules: Track, Engage, and Assess. Balancing Act is currently part of our Engage module and will eventually be part of our Assess module as well. Each module provides an innovative and impactful approach to community engagement which can be used to meet specific needs or combined for a more holistic approach to engagement.

We take pride in all the work we have done to positively impact public services and the quality of life in hundreds of communities. At the same time, we believe there is much important work left to be done. The public sector constitutes a significant portion of the economy, with over \$4 trillion available to state and local governments in the US alone in the past year. In order to allocate and spend these funds, it's more important than ever that local governments have access to accurate and reliable data to make decisions with confidence.

Our team of community engagement experts is committed to understanding your community's goals and challenges so we can tailor a solution aligned to the unique needs of your community. We look forward to working in partnership with you to power the best possible decisions for your community and see positive outcomes in the years to come.



Polco is proud to be in partnership with NLC & ICMA



Approach and Methodology

Survey Instrument - The National Community Survey™ (The NCS™)

We are proposing our turn-key benchmark survey product, The National Community Survey™ (The NCS™) for the City's Public Opinion Survey.

The NCS has been the survey tool of choice for more than 500 communities across the country and is the only resident survey tool endorsed by the International City/County Management Association (ICMA) and the National League of Cities (NLC). It has the advantage of being a cost-efficient, scientific tool for measuring resident satisfaction levels and perceptions. The NCS starts from a base of questions that ask respondents about the quality of local government services. The overall focus is on community livability, so other questions relate to the characteristics of the community that contribute to quality of life, as well as residents' experiences and engagement in community life. The level of standardization of this survey product makes it possible to provide benchmark comparisons for each standard item.

The National Community Survey™ (The NCS™)

- Gold standard for gauging public opinion.
- Trusted by hundreds of jurisdictions.
- Benchmark to 500+ communities
- Clear, unbiased, and accurate results

We help our customers by:

- Evaluating services
- Enhancing communication
- Measuring quality of life
- Building trust
- Planning capital investments
- Informing budgeting
- Monitoring performance
- Assisting strategic planning

The NCS covers 10 key facets of community livability:

- | | |
|------------------------|--------------------------------|
| 1) Economy | 6) Utilities |
| 2) Mobility | 7) Parks and Recreation |
| 3) Community Design | 8) Health and Wellness |
| 4) Natural Environment | 9) Education, Arts and Culture |
| 5) Safety | 10) Inclusivity and Engagement |



Outreach Administration

A representative sample of residents (or other appropriate stakeholders) will be invited to complete the survey to ensure statistically significant response and results. We will use statistically appropriate methodologies to garner community-wide representativeness with at least a 6% margin of error (4-6% is typical and meets best practices for performance measurement, about 250-450 responses) per local jurisdiction. The invitations will contain an introduction outlining the importance of the survey and instructions for completing it. To supplement this effort, the city will be asked to participate in outreach efforts with guidance on best practices from Polco. Responses will be statistically weighted to ensure the best representation of your community (or stakeholder group, if applicable).

We propose to employ multiple modes for outreach.

- Mailed postcard invitations to randomly selected households (with URL for online survey access) 3,000 households.
- Paper surveys will be mailed to all 3,000 randomly selected households. A postage-paid reply envelope would also be provided to return the survey to Polco for data entry.

We will work with the city to optimize the outreach plan, combining our experience with your knowledge of your residents and their needs (e.g., comfort with and access to technology and level of English literacy).

The online portion of the survey will be hosted on the Polco platform. The city will have a branded profile (using your logo) on which the survey would be hosted.

While the city will be conducting the survey with a random, scientific selection of households, officials may still want to hear from everyone in the community. To this end, we include an open participation option once the random survey has been in the field for at least a few weeks. To this end, we provide another web link that the city can post on its website and publicize it to encourage maximum participation. Polco will analyze the open participation data and determine whether combining the opt-in data with the scientific data would be beneficial toward reducing the margin of error around survey results, or if it should be reported under separate cover. The combination of scientifically collected data (via random selection) and opt-in data (non-random) is an emerging practice in the survey research industry.

A strength of Polco is the ability to turn what could be one-off respondents into a “panel” of residents for continued engagement. To take advantage of this feature, residents must be asked, or even required to register at Polco. In the first scenario, the resident completes the survey and after submitting, is given an option to provide an email address and zip code for continued engagement. In the second, the resident would be required to provide their email address and zip code to access the survey. Historically Polco has matched around 70% of its responding users on local voter files. Each user successfully matched against the verification list no longer needs to self-report most additional demographic and geographic information (age, gender, precinct/ward, etc.). This not only improves the accuracy of the results but helps stave off survey fatigue.



City Responsibilities

While Polco will do most of the heavy lifting to provide the approach and methodology described in this proposal, the following would be the City's responsibilities:

- 1) Provide a project point person for Polco to work with on the survey logistics.
- 2) Provide input on the half of page of custom questions to be covered on the survey, provide feedback on survey drafts, and give final approval.
- 3) Provide necessary files for customizing the survey materials (e.g., logos, letterhead, electronic signature) as well as GIS files for any geographic sub areas to be tracked.
- 4) Publicize the survey effort, particularly the open participation survey, if the city desires to implement that option.
- 5) Provide feedback and final approval on reporting and presentation slide deck.

Analysis of Survey Results

The first step in preparing the resident data for analysis will be to weigh the data to reflect the demographic profile of the residents of the community. Weighting is a best practice in survey research to adjust for potential non-response bias and ensure that the demographic characteristics of the survey respondents mirror the overall population. In general, residents with certain characteristics (for example: those who are older or homeowners) are more likely to participate in surveying. Weighting allows us to increase or decrease the weight of each respondent to mimic as closely as possible the demographic profile of the community as described by the U.S. Census and American Community Survey (ACS) data. The weighting variables to be considered will be all those demographics included in the survey. Additionally, Polco has extensive experience with complex weighting schemes required with targeting specific geographic subareas.

For quantitative analysis of the resident survey, we rely on IBM Statistical Package for the Social Sciences (SPSS). We believe that analysis must be replicable and leave a clear path. To this end, we keep every label and command run in SPSS in a syntax file available for audit and re-running, as necessary. We will code any open-ended responses using both an emergent approach, where themes are revealed through the analysis, combined with a deductive approach, where a scheme or codes are predetermined and applied to the data. We use various analysis techniques suited to the project and question.

In addition to providing a full set of responses to each survey question, our online reporting includes interactive charts that show cross tabulations by geographic area and respondent characteristics, as well as comparisons of results against benchmark communities. The data and reports will undergo a thorough quality assurance review. We will audit the original data files and our statistical syntax/analysis files, compare automatically generated output to the formatted output in the report and data check all numbers and text prior to submitting the reports. This will ensure the data analyses are correct and staff, the media and the public will trust the results.

Benchmarking

Polco conducts and collects the most current resident surveys from jurisdictions across the country; we have the largest database of comparative resident opinion of any firm, containing over 700 comparison communities across the nation. The Polco Performance Plan includes comparisons to the national benchmarks. Should the City wish to add optional custom benchmark sets, Polco's benchmark database contains communities that range widely in size, location, and other features, so we can easily create benchmarks to make comparisons to the entire nation or a subset, such as all jurisdictions in a region or population range among other factors.

Reporting

Reports and presentations must serve staff and council members, appointed boards, and commissions as well as the lay public and must be documents that the media can understand and find robust should they wish to press their credibility. These are challenges we accept enthusiastically.

Reporting for The NCS is online on Polco. This allows for interactive displays of your survey results - for ease of exploring and sharing. The reports include an executive summary, explanation of methods and breakdowns of results by areas (if included in the sampling) and respondent characteristics. Comparisons to national benchmarks are also included, and comparisons to regional benchmarks can be purchased. The reports can also be downloaded in PDF form.

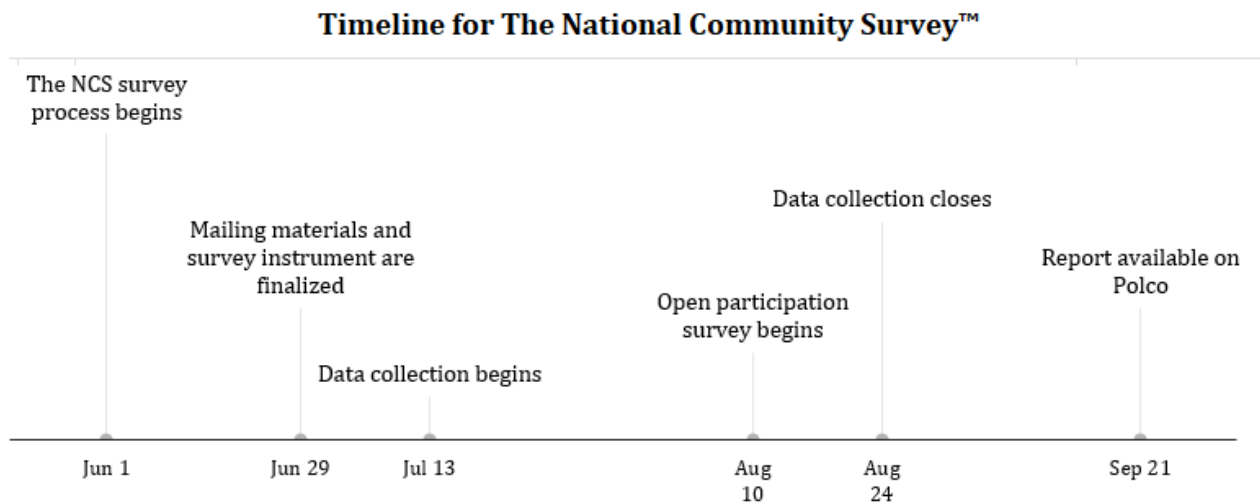


Presentation of Results

We believe in making results interesting and straightforward in our presentations. Our presentations are attractive and visually intuitive; typically, 20-30 minutes in length. We recommend having 15-30 minutes following the presentation portion for questions, depending on your preferences. A remote presentation by Polco adds a great degree of confidence in the independence and reliability of your findings. Whether presenting to staff or council, the credibility of the presentation rests as much on the response to questions from the audience as on the summary of the slides. This is where the benefit of the reputation, education and experience of the Polco team will be especially helpful in providing you the credibility and trust that top level managers expect.

Sample Project Timeline

The actual timeline is subject to change, based on contract award date, and the length of the City's approval process for finalizing the survey and related materials, etc. We are happy to further discuss the City's timing needs and provide other options if needed.



The Polco project management team will produce an exact timeline during the onboarding process.

Survey Timeline

Preparing for the Survey, Weeks 1-7

Week 1	Program Manager (PM) sends The NCS for review
Week 2	[Optional add-on] Send PM drafts of custom questions to add to the survey, if applicable
Week 5	Mailing materials and survey instrument are finalized
Week 6	PM generates representative sample of households in your community



Week 7	Polco prints materials, prepares mailings, and sets up the survey online
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Conducting the Survey, Weeks 7-16

Week 7	Data collection opens for The NCS
Week 8	Initial postcard invitation sent
Week 9	Second invitation sent
Week 12	Final invitation sent
Week 14	Open participation survey begins
Week 16	Data collection closes
Week 15	Send PM final count of returned initial postcards

Creating the Survey, Weeks 16-20

Weeks 16-20	PM conducts survey analysis and prepare report
Week 20	Provides final report

Our Team

The Polco team has expertise in all aspects of community engagement. Team members have strong backgrounds in fields including city management, public policy, software engineering, communications, technology, data science and research analysis. We are proud to have worked with hundreds of jurisdictions nationwide for more than two decades. Supportive, highly skilled, and knowledgeable- our team is resolute in helping the public sector, using our wealth of knowledge to help move communities forward.



Investment:

Item & Description	Unit Price
Assess Module-National Community Survey The National Community Survey® (The NCS®): The nation's most trusted community assessment of resident opinion. Respondents answer questions via Polco's civic surveying and engagement platform which includes real time results and the option to have respondents verified against voter lists. As participants respond they become part of your community's digital panel available for follow up questions, surveys, polls, and other engagement. Your online report will include comparisons to our National Benchmarks, and demographic and geographic comparisons (if response is sufficient by subgroup). Our customer success team will guide your benchmark survey process to ensure smooth implementation. A representative sample of residents (or other appropriate stakeholders) will be invited to complete the survey to ensure statistically significant response and results. We will use statistically appropriate methodologies to garner community-wide representativeness with approximately a 6% margin of error (4-6% is typical and meets best practices for performance measurement, about 250-450 responses) per local jurisdiction. The invitations will contain an introduction outlining the importance of the survey and instructions for completing it. To supplement this effort, the client will be asked to participate in outreach efforts with guidance on best practices from Polco. Responses will be statistically weighted to ensure the best representation of your community (or stakeholder group, if applicable).	\$18,500.00/yr.
Optional -The NCS - 1/2 Page of Custom Questions As The NCS is a comprehensive survey we suggest not adding custom questions to minimize respondent burden and recommend asking custom questions in a separate survey on Polco. However, we recognize that while you are making this larger effort to get input from your residents you may want to add a few custom items. This is not included in the Polco Performance plan but can be added.	\$2,800.00/yr. (full page of custom questions is \$5,000.00)

Attachment: Mequon WI Polco Update March 2024 (9517 : Vendor Selection for Community Survey)



Optional-Remote Presentation of Results A senior Polco staff member will make one presentation of survey results to staff, Council, Boards, or other appropriate groups. This will be conducted on Zoom or another appropriate technology (that is feasible for both parties and suits the purpose). For this presentation, we use Microsoft® PowerPoint or Google Slides as a visual aid and a copy of the slideshow is shared with your staff for internal use.	\$3,000.00/yr. (in-person presentation is available at same rate for WI cities)
Spanish Translation of Benchmark Survey Polco will provide a Spanish translation of your survey and publish it online for Spanish speaking respondents. Survey invitations will provide a URL and Spanish language instructions for completing the Spanish survey online. Surveys will also be mailed in both Spanish and English.	Included
Total	\$24,300.00
Other Options for the City of Mequon	
A "Digital Only NCS" with postcard-postcard outreach, includes a "full page" of custom questions". This includes postcard invites to a sample of 3k households.	\$18,000.00/yr. (with remote presentation and Spanish the total is \$21,750.00)
"Digital Only NCS" Polco will build the NCS with your custom questions, eliminate the postcard outreach to save cost, and it would be a purely non-probability survey.	\$15,000.00/yr. (with remote presentation and Spanish the total is \$18,750.00)

Attachment: Mequon WI Polco Update March 2024 (9517 : Vendor Selection for Community Survey)



A Full Custom Survey with Polco

Assess Module - Custom Assessment (Per assessment, per iteration) \$15,000.00

Custom assessments include custom question development, programming, and implementation with our survey science team. Polco's researchers will guide the development of up to a 5-page survey through an iterative process with 3 meetings and homework on each side to refine information needs and priorities (client) and develop appropriate survey questions to meet those needs (researchers) We will also guide you on which demographic questions, if any, to add to the survey for weighting and crosstabulation.

Custom survey analysis and reporting for up to 5-page equivalent survey \$10,000.00

Polco will conduct all survey analysis and reporting. Our Survey Research team will prepare the data for weighting to reflect the demographic profile of the residents of your community. Your data will be subject to quantitative analysis using various techniques suited to the project and questions. In addition to providing a full set of responses to each survey question, our online reporting includes charts that show cross-tabulations by geographic area and respondent characteristics, as well as comparisons of results against benchmark communities, where applicable. The data and reports will undergo a thorough quality assurance review. We will audit the original data files and our statistical syntax/analysis files, compare automatically generated output to the formatted output in the report and data check all numbers and text prior to submitting the reports. This will ensure the data analyses are correct and staff, the media and the public will trust the results.

Custom Survey Outreach Random Sample Size of 3,000 Households \$8,200.00

Mailed postcard invitations to randomly selected households (with URL for online survey access) Mailed paper surveys will be sent to the random sample as a second round of outreach (three-part mailing to each household, with postage paid envelopes and cover letters that include the option to complete the survey online if preferred).

\$33,200.00/yr. (with remote presentation and Spanish the total is **\$36,950.00**. A full custom digital only survey **\$28,750.00**)

Below is an overview of more engagement options for Mequon to consider:

The Engage Module -INCLUDED

Module Overview

Community leaders use our Engage module to get essential input from residents and other stakeholders. They engage their community on a wide variety of topics at critical points in policy and decision-making



n-r-c.com



polco.us

cycles - information gathering, needs assessment, resource trade-offs, policy review, performance measurement, etc. Polco provides the platform to build from with customizable or templates surveys, polls, live events, and simulations.

Participant Overview

The Participant Overview empowers local governments to easily view their entire subscriber base in one place to see which residents are interacting with surveys, polls, live events, and simulations. This overview also allows you to view the demographics of your subscribers and watch your subscriber base grow over time.

Ask

Ask allows community leaders to post unlimited surveys, polls, and live events for resident input and measures resident satisfaction on a variety of livability topics. Choose from a variety of flexible question types, including open-ended, checkbox, satisfaction scale, option button, and point allocation. Conditional logic allows residents to skip questions where applicable and avoid survey fatigue. Use email outreach and social media templates to get the word out. View results on a heatmap to understand location-related issues. Hear from a representative group of residents on a wide range of everyday, emerging, and project-related issues with auto-weighting.

Polco Live

Try real-time polling with Polco Live to engage stakeholders at your in-person and virtual events. With Polco Live, your organization can gather useful information instantly, while encouraging audience participation at the same time. Polco Live brings you feedback seamlessly along with online streamed events, webinars, video calls, in-person meetings, and conferences. These capabilities allow residents to engage in real-time and transform static presentations into interactive, visual experiences that are engaging.

Engagement Library

Find 100+ expert-designed surveys and polls in the Library to help you save time and avoid fears or perceptions of bias. This library contains curated surveys and polls created by survey scientists at the National Research Center, Polco's dedicated research team. They cover a wide variety of topics and service areas for which local governments commonly seek input

When the city is ready to investigate more data to drive decisions, grant applications, and policy recommendations, we suggest reviewing our track module.



The Track Module

The Track Module's data dashboards place community statistics alongside resident sentiment to provide insight into areas of strength and need in your community. Comparisons to our nationwide database provide context for your community's data. These dashboards are powered by the strategic Government Performance Action and Learning (GPAL) collaboration. GPAL was originally envisioned by Polco and COWS at UW Madison in conversation with ICMA.

Data scientists from Polco and COWS vetted data from hundreds of potential sources and chose the highest quality, most comparable, and most comprehensive performance metrics. Thousands of hours were dedicated to collect, clean, and integrate hundreds of data points. This data was then added to Polco's proprietary database of longitudinal stakeholder sentiment from hundreds of communities and organized into the domains from the National Research Center's model of community livability - a model developed through decades of research and work with local governments. Indices were developed to provide an overview of community health in each domain, with deep dives into the components. The indices and overall model were improved through review and discussion with key initial collaborators at Arizona State University, Envisio, and Stanford.

The Dashboards: (The overview Dashboard is included at no cost to the city)

The data from the GPAL partnership powers six Domain Dashboards and one Overview Dashboard. **The Overview Dashboard** brings together community statistics and resident sentiment to reveal the overall health of a community or district. The dashboard shows change over time, identifies characteristics of the community needed to enhance the quality of life, shows resident perceptions of the quality of current government services and community life, and enables you to see how your community performs in comparison to others.

The Domain Dashboards focus on six key areas: Economy, Community Health, Community Connection, Land Use, Safety, and Education, Arts, and Culture.

The Community Connection Dashboard provides the data that local governments need to foster an environment of connection across the community, which results in more engaged residents. The dashboard includes the following community statistics, among others: a sense of civic community and provide, attracting people from diverse backgrounds, and social vulnerability index (0-100).

Here is a quick summary of our Balancing Act Budget Engagement tools: (ask us about pricing if interested)



- **Budget Simulation:** provides a way for the City to frame tough financial tradeoffs and puts residents in the shoes of decision makers. It offers several different ways to interact with the budget items and produces detailed, visual reports. We have adapted the budget simulation to be used with plans for housing, climate action, transit, parking and more.
- **Prioritize:** is a simple, visual way to present projects and costs. Based on a set budget, users select projects up to the specified amount, and rank order them. The report provides weighted and unweighted results and can identify top projects based on a variety of voting techniques. This tool is well suited for a specific funding source such as budget surpluses or capital projects.
- **Taxpayer Receipt:** produces for residents an estimate of taxes paid and how they are utilized, illustrating the value received from the city.

Included is **Meeting Mode** (where you can get feedback in real time from your constituents), detailed back-end **Analytics** and unlimited technical assistance. The software requires no installation, is easy to set up and easy to use.



City of Mequon 2025 Community-Wide Vendor Selection Matrix

	ETC Institute	Magellan Strategies	Polco
Cost & Methodology			
Original Price Quote	\$18,500	\$10,000	\$24,300-\$33,200
Timeline	Will work w/ City's extended time frame 4 mos. is all that is needed	40 days or longer if requested by the City	5 mos. or longer if requested by City
Sample Size	Will send approx. 2,500 surveys with a target of 400 responses=level of precision +/-5% margin of error	50% of adult population with a goal of 1,200 responses	Conducts Scientific Sample with 3,000 Residents to get 250-450 responses and then Opens to Whole Community
Distribution Method	Hybrid approach, includes mailing hard copy of survey with a City cover letter & online version	Sends multiple MMS text survey invitations, survey link via email, & QR code to publicize	Mail Paper Survey to Sample and QR Code for rest of Community or Digital only (\$15,000)
Cost to mail to all households	\$23,835	Only willing to send 2 reminder postcards- new cost \$15,000	\$48,200
Question Development			
Benchmark Capability	Y/Regional & National	Compares with Cities of Similar Size/Demographics	Y- 4 pages (26 questions)
# of questions	Low 30's (5-6 pages)	25	26-33
Question Customization	Y	Y	1.5 pages: 6-7 questions or all custom for \$33,200
Question Development Help	3-4 drafts	Y	3 meetings(included in \$33,200 price)
Question Refinement	Y	Y	Y
Administrative			
Address Generation	Buys addresses- GIS file	Uses CSS Direct to get #s	Buys postal service addresses
Reminder Postcard	If Necessary	N	Y
Assigned Project Manager	Y	Y	Y
Dashboard for Comparison	Including at no additional cost(typically \$5,000 addit.)	Cross-tab report	Y
Results Presentation	Virtual Presentation included in price, \$2,000 addit. for in-person	Additional Fee for in-person/Virtual included	3K(included in price)- In Person or Virtual
Additional Services Offered	Toll-free number to assist residents, will include a drawing for \$500 gift card as incentive for residents to respond	Uses ChatGPT to summarize open- ended questions, adds images to enhance survey, all-inclusive pricing	Addit. Services at addit. fees as noted in proposal
References	700 cities/counties	100+ local govts.	500+ & ICMA

**City of Mequon
2025 Community-Wide Survey Timeline**

2024	Action Step	Timing
Q1	Develop Vendor Rating Matrix	February – March
	Staff Solicit Quotes	March
Q2	Vendor Demos / Discussion	April-June
	Vendor Selected by Public Welfare	July
	Review Question Topics Received from Committees	August
	Committee of the Whole Vendor & Question Topic Discussion	September
Q4	Question Development at Public Welfare Committee	October – December
2025	Action Step	Timing
Q1	Final Questions Approval by Council	January
Q2	Conduct the Community-Wide Survey	May
	Data Collection and Analysis by Consultants	May
	Review and Audit of Draft Report	June
	Presentation of Results to the Common Council	July
	Finalization of Community-Wide Survey Report	July



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Office of Administration

TO: Public Welfare Committee
FROM: Justin Schoenemann, Assistant City Administrator
DATE: February 6, 2024
SUBJECT: Work Calendar

Meeting Topics

June

- Community Survey (Continued)

July

- Community Survey (Continued)

August

- Community Survey (Continued)

Future Agenda Topics

- Chapter II, Article IV Review (Continued)
- Adopt-A-Median Program
- Community Outreach Initiatives
- Logo Redesign/Branding

2024 Completed Items

- FEMA Model Ordinance
- Aldermanic Ward Redistricting
- Architectural Board Review
- Sign Code Ordinance