

April 23, 2008

Brandi Braun
Executive Assistant to the Mayor
City of Gahanna
200 S. Hamilton Road
Gahanna, OH 43230

Dear Ms. Braun:

The following will serve as a letter of agreement specifying survey services by CJI Research Corporation (CJI) to the City of Gahanna (The City).

CJI will conduct a scientifically valid telephone survey of Gahanna adult residents living in households listed on lists of registered voters and able to be matched to a household telephone number, and sampled according to the methods and procedures specified in the CJI proposal for services dated April 23, 2008. The number of interviews will be 800, and the average length of the survey instrument will not exceed 15 minutes. The specific questions to be asked are to be determined in discussions between CJI and representatives of The City of Gahanna. The sample will be drawn from a voter list matched to telephone numbers.

The process of questionnaire development includes interviews with appropriate city officials who may utilize the information gathered. We include up to five such interviews in the charges. If there are more than five officials involved, two or three persons can be interviewed at a time. We will make certain blocks of time available for this function, and rely on your office to schedule the city officials within those times. In addition, the City should name an operational contact for the project, and a small (two or three) person "Operating Group" to oversee the project, review drafts, and attend to other matters that may arise.

When the survey has been completed, a thorough report will be prepared and a draft submitted for review. Upon revision and approval of a final draft, an executive summary will be prepared. Five bound color copies of the report will be provided, one unbound original in color and one in grayscale. An electronic copy will also be provided on CD. Based on the charts in the report, a Power Point presentation will be prepared and I will address the City Council on one occasion, and, if desired, staff of the several interested departments on one other occasion. It too will be provided in electronic copy.

Following acceptance by The City of the final report, we are available for telephone consultation on how the data may apply to certain decisions that the City had not anticipated, for example. Such ongoing consultation is provided at no charge unless it becomes excessive. If workload permits, CJI may, at our option, make ourselves available in-person rather than by telephone for the ongoing consultation function. If such consultations approach being "excessive," CJI will discuss that issue and reach agreement with The City before requesting any compensation.

Archival service is included. This service includes storage of the survey data files and production of whatever additional analysis may be needed to explore new situations for a period of two years.

The charge will be \$34,135.

The timeline is shown below. The timeline can vary somewhat depending on the time required for questionnaire and draft report reviews.

- | | | |
|-----|--|---------------|
| 1. | Kick-off meeting with client
Discuss final objectives and project plan. | Week 1 |
| 2. | Conduct key informant interviews with City staff and, if desirable, also with key community leaders. (Christmas and New Year holidays occur in this period and access to key informants is likely to be limited. Thus more time than normal is included) | Weeks 1- 5 |
| 3. | Report on key informant results and present initial survey draft for client comment | Week 6 |
| 4. | Revise questionnaire based on client comments and internal peer review and pre-test survey instrument | Week 7 |
| 5. | Finalize survey and prepare CATI interviewing program
Prepare sample | Week 8 |
| 6. | Conduct interviews | Weeks 8 – 10 |
| 7. | Submit report outline for comment and approval | Week 11 |
| 8. | Data analysis and report preparation | Weeks 11 – 13 |
| 9. | Submit initial draft report | Week 13 |
| 10. | Submit final report and make presentation to City Council | Week 17 |

Please review this letter and review the proposal referenced in it. If you and other appropriate authorities in the City of Gahanna are in agreement with these terms, please print and have the appropriate authority sign two copies, retain one and return

the other to me.

Yours truly,

A handwritten signature in black ink, appearing to read 'H. M. Clark', with a large, stylized flourish at the end.

Hugh M. Clark Ph.D. April 23, 2008
President
CJI Research Corporation

For The City of Gahanna (Signature)

Title

Date



**A proposal for services
To
The City of Gahanna**

Prepared by:
Hugh M. Clark, Ph.D.
April 24, 2008

cji@columbus.rr.com
614-338-1008

Authorized personnel

Hugh M. Clark, Ph.D., is president of CJI Research Corporation and is authorized to bind the company to the terms of this contract. The price quote is valid for six months from the date on the cover of this proposal.

Dr. Clark may be contacted for any clarification or if an interview is desired. The contact information is as follows:

Phone: 614-338-1008
Fax: 614-338-1805
email: hughclark@columbus.rr.com

CJI Research Corporation
180 South Ardmore Road
Columbus, Ohio 43209

Hugh M. Clark, Ph.D.
President

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Proposal Summary

CJI Research Corporation (CJI), an Ohio-based national research consultancy, proposes to conduct a survey by telephone of 600 or 800 households in the City of Gahanna (The City) with respondents divided approximately equally among each of the four wards. Depending on the actual population distribution among the wards, the data will be weighted to the correct proportions. Optionally, the survey interview can be fifteen or twenty minutes in length.

We have been in business since 1975, providing sophisticated research services to clients locally and nationally. Our experience with local governments is extensive and ranges geographically from Anchorage (AK) to Worcester (MA).

Approximately half of our business is conducted in states other than Ohio. Currently we have active projects or long term contracts in California, Kansas, Illinois, Maryland, and Oregon. We have recently decided to alter our balance of local/national work somewhat by pursuing additional clients in central Ohio. Our response to this RFP is part of that effort.

Dr. Hugh Clark will serve as the primary researcher for the project. This means that he personally will serve as the client contact, and will prepare all elements of the project. We follow this top-contact model with support provided internally by staff rather than the more common reverse approach of using staff as the front-line and senior researcher in the background because it is more effective.

Our surveys use several processes developed over our thirty year history to customize basic survey science to the needs of each client.

- We use our process of tailored sampling to design the survey sample in a way that meets the needs of the client for accuracy and the ability to duplicate the method in the future for comparison.
- We customize our questionnaire to the client needs by our interactive questionnaire development process.
- We use approaches to measuring customer satisfaction, including extended scales, impact scores, and incident reporting, that can reveal change over time, unlike many methods that inadequately measure citizen satisfaction.
- In the analysis and reporting, we use an interactive writing/analysis process to extract meaning from the data and provide a detailed report using charts and graphs.
- Survey statistics can confuse as well as enlighten. We provide strategic interpretation of the results so that the client can understand and use them.
- After we deliver the report and the data files to the client, we provide our free archival service. We retain a copy of the data and provide at no additional cost, any additional

tables needed for a two year period.

The Proposal

About CJI Research

CJI Research conducts surveys, focus groups, secondary data analysis, and other consulting services for governmental and non-profit organizations throughout the United States. After Dr. Hugh Clark left teaching political science (at Michigan State University, then Miami University) he entered private business practice. Since 1975, Dr. Clark and his firm have provided survey services to various cities in Franklin County, and many public entities throughout the United States. These began in 1975 with a survey for the Upper Arlington public schools, and have continued with other studies for that city, the city of Worthington, the City of Columbus, the research arm of Columbus (now defunct) The Metropolitan Human Services Commission, the Columbus Schools, ADAMH, the Board of Mental Retardation and Developmental Disabilities, and many others.

Currently, we are working with four major local clients. One is Columbus Children's Hospital, with which we have worked since 1995. Also, we have recently completed a major engagement with a coalition of mayors and school authorities involving reform of funding methods for Ohio's k-12 education system. We are working with Goodwill of Columbus, and the Ohio Society of CPAs also at the present time.

CJI Research currently has projects running in Sacramento, California (satisfaction with public transportation, interest in new service), and Champaign/Urbana (IL). In the latter project we are studying methods of managing mobility while limiting sprawl as the community grows in the coming twenty years. We have worked on various similar projects from Anchorage (AK) in the west to Worcester (MA) in the east; from Chicago's suburbs in the north, to Tampa (FL) in the south, and in most states in between.

It is important to understand that our typical project precisely parallels many elements of the study Gahanna wishes to conduct:

- Profile awareness and use of services.
- Measure satisfaction of those services.
- Examine interest in new or altered services.
- Measure willingness to fund augmented services through taxes or fees
- Offer opportunities for respondents to offer comments and suggestions

We have been innovators in the area of customer satisfaction work, having implemented new concepts for understanding and measuring customer satisfaction for widely divergent clients such as Children's Hospital, Sacramento's regional transit system, and the Ohio Society for Certified Public Accountants. The latter organization (The Ohio Society) is a good example

of the success of our interactions with clients. Recently they were named one of only "Seven Remarkable Organizations" by the American Society of Association Executives after their exhaustive study of more than 1,000 such organizations in the United States. A key reason for this distinction involves the methods the Ohio Society uses to listen to and understand its members, methods that CJI helped develop since 1989.

Our training and experience provide us the capacity to offer accurate information. Our restless approach to data analysis tends to take us beyond the usual *pro forma* descriptive findings provided in tables or crude graphs by many competitors. We provide a thorough data analysis expressed in color charts that clearly express what the client should know about the data.

Understanding the City of Gahanna's needs for information

There are two rather general objectives for the Gahanna survey and several more specific objectives. The general objectives involve educating the citizens of the city and providing policy information for city officials, and providing a benchmark to which future surveys can be compared. The specific information-gathering elements of the RFP are directed to the following five basic areas of interest:

- satisfaction with city services but also with elements of the quality of life in Gahanna, including communications, growth and development. Satisfaction with services will need to be broken down into those who have used and have not used city services. In addition, in measuring satisfaction it is important to ask about incidents of problems or of especially good service. However, it is important to set time limits on this. People remember negative events for many years.
- interest in potential new services (including open end suggestions for new services). Often people find it difficult to conceptualize new services, thus it will be important to ask both open end questions and closed end items about possible new services that the city authorities would like to explore and believe are feasible.
- willingness to pay for those services with local taxes and/or fees. Citizen willingness to pay for public services has been a mainstay of CJI's practice since 1975 when we conducted our first levy survey.
- involvement with city and community organizations, an especially important consideration for communities in an isolative era characterized by the title of the book by the political scientist Robert Putnam as "Bowling Alone."
- reasons for moving to and remaining in the city and expectation of moving out.

In addition:

- The survey results will be broken down by ward.

- The results must provide a benchmark. This means that the sampling, questioning, and analysis methods must be able to be replicated by others at a future time. This, in turn, means that the methods must be described in a technical appendix to the report in a way that another survey firm could, if necessary, conduct the survey in a directly comparable manner thus making the results comparable.

The survey process

The survey process itself consists of study design, sampling, questionnaire design, analysis, and reporting.

STUDY DESIGN

The first stage of the project will involve finalizing the overall study design. This means deciding final objectives as specifically as possible, and determining which of the sample and questionnaire-length options will best serve the City's needs as well as fit within the budget available. This process will occur in a single meeting of the project manager(s) from the City of Gahanna with Dr. Clark, and, if desirable, Dr. Schwirian.

SAMPLING

Design of the survey sample profoundly affects the results of the survey. Sometimes people focus on "sample error" as if this were the primary source of potential distortion of results. It is not. It is only one component of potentially erroneous results.

Ideally, if budget allows, we propose a sample size of 800, or approximately 200 per ward. For the entire sample of 800, this will provide a sample error of $\pm 3.5\%$ at the 95% level of confidence, and $\pm 4.3\%$ at the 99% level. The ward level samples of approximately 200 each, would provide sample error of $\pm 7\%$ at the 95% level.

Optionally, if budget constraints prevent the use of a sample of this size, a sample of 600 can be used. A sample of that size would provide sample error of $\pm 4\%$. The sample error is not significantly greater for a sample of this size rather than 800, but at the ward level, or within other demographic breakdowns (by age, for example) the data become less reliable because of the lack of cases in subcategories.

However, when this (or any) sample is broken down into sub-aggregate units, each unit becomes a sample unto itself with its own sample error and confidence levels which will be considerably greater.

Detailed discussion of breaking the sample down by ward

The following discussion of the process of thinking through how to tailor the sample to Gahanna's needs is lengthy and perhaps terminally boring for the layperson. It is provided to illustrate the ways in which sampling decisions make or break a survey, and the reasons for which a *tailored sample* is the best option.

The objective of breaking down the sample by ward presents several sample-design challenges that will have major effects on the results. Several methods would be valid, and the choice among them will depend in part on how each option may fit with Gahanna City's underlying purpose.

Two basic approaches. There are two basic sampling options for a telephone survey that is to be broken down by ward: (a) Listed number samples drawn from voter lists or (b) random-digit dialed (RDD) samples matched to ward through a complex process.

The City has elected to use a voter list sample, but should be aware of the relative advantages and disadvantages of each approach.

Voter list samples have the advantage that the address and ward of the respondent are known. However, the disadvantages are that unpublished numbers are not included in the sample, very new listings (usually younger people) may not be immediately available, and the process of matching telephone numbers to households achieves a "match" only approximately 55% of the time. Finally, by definition, voter list samples exclude households with no registered voters.

On the other hand, voter lists were used for the earlier Parks and Recreation study, and use of voter lists thus would be more comparable to that earlier study. Moreover, using voter lists does provide a form of screening for those who are to the extent of voting at least, more attentive to civic affairs and able therefore to offer opinions and influence local government.

The alternative, using random a digit dialed sample (RDD) represents a population more completely, but is considerably less precise for matching to ward boundaries and relies on self-report of voter registration. Random Digit dialing is based on sophisticated databases that enable random numbers to be produced that are known to be working telephone numbers, including both published, unpublished, and new numbers. The RDD approach has the advantage of greater randomness, but the disadvantage is that it can only approximate a geographic area (such as city and ward) since some telephone number exchanges overlap municipal and other civic boundaries. Assuring that the respondents all live in the city of Gahanna is easily accomplished by asking a screening question. But for identifying the ward, the situation is more difficult since only those who ardently follow politics would know their ward.

The obvious solution to the need to sample by ward is to use voter lists as was done in the Parks and Recreation sample.

INTERACTIVE QUESTIONNAIRE DEVELOPMENT PROCESS

Since 1975, CJI Research has created and fielded hundreds of telephone surveys. Each of them has been created in thoughtful but efficient interaction between the client and CJI staff members. The questionnaire must be carefully constructed to support both the client's objectives and the types of analysis to be used.

At the beginning of the *interactive questionnaire development process*, Dr. Clark or a staff member will interview key city government staff and political leadership as designated by the project manager for the city. There is no formal limit on the number of such interviews except that it should be sufficient to represent the interests being served by the survey, and yet be reasonable to complete in the allowed time and budget. Usually ten to twelve such interviews suffice to provide a clear overview of current trends in a city and the needs for information.

After this interview process, Dr. Clark personally prepares a draft questionnaire for discussion with the client. The questionnaire is then revised. The process is often repeated as priorities are sorted out. The first draft is generally too long because it incorporates as much as possible of the information various interests desire. However, to maintain reasonable length, priorities must be decided between the client and CJI. This process can be interesting because it usually provides a simulation of policy prioritization.

In addition to this internal process, it is ideal when such service satisfaction questionnaires can also utilize citizen focus groups to provide perspective on how consumers relate to the qualities of life and municipal services. Optional focus groups, while not inexpensive, would add substantially effectiveness to the survey stage. (Costs will be provided on request, but are not included in the separate price quote.)

The questionnaire will contain four components. Some may be in separate sections and some may be in combined sections:

- Services
 - Awareness of city services.
 - Experience with city services in a defined time span.
 - Perceptions of factors other than city services affecting quality of life perceptions, including communication, growth, development and other aspects of life in Gahanna
 - Satisfaction with services.
 - Interest in services and amenities residents would like, coupled with their willingness to pay for these.
- Community involvement

- Activities within the community.
- Interest in, and levels of involvement with, city government.
- Reasons for in-moving and interest in and reasons for potentially leaving
- Open end comments and suggestions
- Demographics

A typical telephone survey can last for fifteen to twenty minutes. Any longer and the quality of the data declines badly. Depending on the complexity of the questions, a survey of reasonable length can contain between 40 and 60 items. For most studies this is entirely adequate.

For some studies, there is a need for more information than these limits can allow. In those cases, if we simply need to know what people said city-wide about certain topics, and not break them down by ward, we can add more questions to the overall study by “splitting” the sample. This means that only in certain parts of the survey, if we needed to ask additional questions about a specific topic, we would consider asking only half the sample those questions, and the other half other questions. Of course, this means a somewhat smaller of sample for only those questions, but that is generally not a problem.

The questionnaire will be converted to CATI (computer assisted telephone interviewing) format for proper administration in the interviewing process. This enables the human interviewer to read from the screen while the computer handles automated branching to the proper follow-up questions, saving time and confusion for the interviewer. This speeds the process and makes the resulting data both more accurate and faster to process.

The survey will be pre-tested for ease of administration and clarity of questions.

The content of the survey will be customized to the needs of the analysis. Questions will be asked about awareness of and experiences and satisfaction with services, assessment of quality of life, preference for service changes, and other areas revealed in the *interactive questionnaire development* process.

Other elements of the questionnaire design are discussed below in the analysis section.

INTERACTIVE WRITING/ANALYSIS PROCESS

Dr. Clark personally performs most of the statistical analysis so that it is interactive with preparation of the report which he also personally writes. Joining the analysis and writing functions is unusual, but is important because each level of analysis creates questions that need to be further explored. As he writes and analyzes data, the process becomes a systematic exploration of the findings. In most survey organizations, a data processing department creates sets of standard data tables that are not exploratory in this way, and which thus lose nuances and potential for uncovering unexpected relationships.

The analysis of the survey data is conducted in-house using the statistical package, SPSS. A final data file can be delivered to the City of Gahanna in various formats, including SPSS, SAS, dbf, xls, and others. CJI also retains a copy of the data in our archives for two reasons: (1) safekeeping, and (2) we provide, at no additional cost, additional tables or other analysis for a period of two years.

Results are presented in easily understood graphic formats. The statistics on which the charts are based range from simple percentages such as frequency distributions and crosstabulations, to more complex statistics such as factor analysis, regression, and CHAID. We believe it is important to explore and mine the data in all meaningful ways, but then to express the results in ways that the lay client can easily understand and put to use.

Customizing the questionnaire to the needs of analysis

The analysis depends, of course, on the design of the survey questions. The survey will include a citizen satisfaction section. There are ways to various ways to improve on the standard traditional practices. For example, it is traditional to use a five point scale of satisfaction. This can be useful for some purposes. However, clients often report that they see little movement over time in their five point scores.

Part of the reason is that lack of movement is in the scale itself, not in their performance. For many situations, respondents, whether consumers or citizens, tend to be generally satisfied with services, but they are reluctant to give the highest scores since service is rarely perfect. Thus the modal (most frequent) score tends to be 4, and the variation over time in mean scores is measurable only in tenths of a point as a few more people score 3 or 5, changing the final mean slightly.

An *extended scale* based on a seven or ten point scale or a variant on that such as a *positive weighted scale*, tends to be a more effective measure of satisfaction in a survey that is to be repeated over time. Such scales allow for greater latitude in the response categories at the positive end, while also capturing the negative.

Also, *time-limited experience reporting* is important. Asking for service ratings without specifying a time frame invites recall of disappointment with service that may have occurred long ago. People recall peak negative experiences for a long while. A parking ticket five years ago thought to be unjustified can result in resentful rating of a police department today. Thus both experience with a service and a time limited rating need to be used.

We frequently work with health care providers. It is not uncommon in a focus group setting for a participant to describe his or her dissatisfaction with an emergency room visit, for example. But when asked when the visit occurred, the answer will be in the distant past, ten or even twenty years ago. People remember negative events. It is very important to limit the time frame when asking service rating questions.

In addition, we use a technique called the impact score. The impact score is a combination of the rating itself (poor to excellent) and respondent incident reporting of a recent service problem within a specific time frame such as the past month or six months. Computing the impact score involves taking the mean service rating score of those reporting a problem and those reporting no problem, and computing the gap between them. The gap is then multiplied times the percent who report they had experienced a problem in the past month. This results in an "impact score" – how adversely a specific aspect of service is "impacting" customer satisfaction.

In addition, this approach enables us to observe the incidence of reported problems as well as the general attitude toward satisfaction. For an over-time measurement this is invaluable.

REPORT

The report is written as the analysis proceeds. The final stage of the reporting process is editing and presenting the report. Our reports are presented with graphs and tables and in lay language. The report contains graphs that are also used in a Power Point presentation, thus providing a ready tool for further presentations. The report is written around an outline that is pre-agreed with the client. It therefore becomes a decision making tool and a reference work.

Samples of our work are not included with this report. However, those that are not proprietary can be shared if the proposal reviewers wish to examine them.

AFTER THE PRESENTATION

After the presentation, we do not go away. We are available for telephone consultation on how the data may apply to certain decisions that the City had not anticipated, for example. Normally such consultation is provided at no charge unless it becomes extensive.

Our archival service is provided at no additional charge. It includes storage of a copy of the data files and production of whatever additional analysis may be needed to explore new situations for a period of two years.

Who will conduct the survey?

Dr. Hugh Clark will be the project manager and hands-on researcher. The project will not be turned over to lower level staff. You will work directly with Dr. Clark. The telephone interviewing will be conducted by Foresight Research of Rochester, Michigan. Foresight is among the premier telephone research firms in the United States. Their work is not

inexpensive, but it is of such unequalled quality that quality assurance firms such as JD Power rely on them.

CJI Research maintains a network of colleagues throughout the United States with whom we work frequently. When specialized assistance is needed in planning, engineering, transit-oriented development, and special aspects of psychology and medical practice. In this case, we do not anticipate such needs, but the resources are in place if needed.

We also have a group of talented personnel available for various tasks they are described in the next section of the proposal.

Qualifications and Financial Stability

CJI Research Corporation has been conducting surveys since 1975. Dr. Hugh M. Clark, trained as a political scientist, then taught at Michigan State and then at Miami University (of Ohio) leaving academia in 1975 to establish a private research consulting practice which would offer a more hands-on research career with more immediate applicability to real-world challenges.

Since the mid 1970's CJI Research has conducted hundreds of research surveys locally and nationally. Since 1995, we have limited our clientele to governmental and non-profit organizations. Locally our major clients in the past few years have included Children's Hospital, Battelle, the Ohio Society for CPAs, the Ohio Children's Hospital Association, United Way, the Ohio State Medical Association, Buckeye Association of School Administrators, Bexley City Schools, Goodwill Industries, the Board of Mental Retardation and Developmental Disabilities, National Church Residences and others.

How our studies relate to the Gahanna study

We are intimately familiar with issues of local governance. Beginning in the early 1980's many of our studies involved citizen use and understanding of local services and their willingness to support them with taxation. Our studies of local issues began with surveys for passing a City income tax for Columbus, and a sales tax for COTA. They evolved through the 1980's into studies of local services including trash pickup for Columbus, street lighting for Upper Arlington, new city facilities for Worthington, child care services for Columbus, gentrification of Columbus neighborhoods, school assignment policy for Columbus, and numerous other studies.

Nationally we are known for work with public transportation systems. Our work with them invariably involves work with the cities they serve. Often, as in the case of a current study in Champaign/Urbana (IL) the work includes a strong aspect of city planning for managing mobility and densities as growth occurs. The challenge in that five year project is to work with planners to find a balance between development and density coupled with local and mid-distance mobility options such as improved walkways, bike paths, transit and other mobility options that will allow the city to double in size, growing based largely on university/business alliances while limiting the extent of sprawl and maintaining a vibrant downtown.

Our major studies of attitudes toward quality and funding of transportation services in many cities parallel precisely the kinds of work that Gahanna wishes to complete. In each case we ask about awareness of and satisfaction with current services, desire for new services, willingness to pay taxes or fees for new services, suggestions for changes of services and so

forth. In each case, the surveys must be broken down into sampling sub-units for analysis just as this survey is to be broken down by ward.

Another area of our work involves attitudes toward school systems and their funding. Education funding is of major concern not only to school boards but to mayors of the cities they serve. In this regard, we have recently completed a major study of public attitudes toward school funding for a coalition of mayors and school administrators.

Financial wherewithal to complete the work required.

CJI Research has been in business since 1975 and has been profitable in every year except the recessionary year of 1992 when two of our clients (The Columbus Dispatch and Columbia Gas) ran into such difficulties that they had to cancel major retainer arrangements with us. Since that time, our profitability, coupled with an appropriate floating line of credit (Chase Bank), and with our alliances and solid credit arrangements with interviewing houses, data entry firms, sampling services, online panel-survey houses, and others all enable us to complete projects with solid financial backing. We can understand the reason for the question because on two occasions we have been asked to complete projects for clients who had used small, financially unstable firms that had to abandon projects mid-stream because of financial difficulty. However, our cash flow and credit resources are very substantial and that is not a problem.

All we ask of our clients is progress payments on a thirty day basis.

Attesting to their confidence in our financial stability are our clients who rely on us for continuing work year after year. We hold multi-year contracts in Eugene (OR), Kansas City (MO), Champaign/Urbana (IL), Montgomery County (MD). Our work locally includes a number of clients who have relied on our capacity to produce research results and associated consultation continuously over time. We have worked work for more than ten years with Children's Hospital, National Church Residences, the Ohio Society of CPAs and others.

Partial list of clients for similar studies in the past two years

We understand similar studies to include studies related to (1) awareness and use of local services and satisfaction with them, (2) willingness to fund public services, and (3) interest in alternative services. Such clients have included those on the following list. Dr. Clark, has personally conducted all of these studies.

- Children's Hospital, numerous studies annually, including service satisfaction, interest in new service, awareness of services, and many other topics
- Board of Mental Retardation and Developmental Disabilities. Awareness of services and willingness to support them with tax dollars.

- Bexley City Schools. Interest in altering funding mechanisms through use of an income tax (successful income tax levy)
- Lextran, Transit system of Lexington (KY), awareness of service, interest in service extension, and willingness to fund service expansion (successful property tax levy)
- Buckeye Association of School Administrators. Coalition of mayors and school authorities seeking alternative mechanisms for funding k-12 education in Ohio.
- Ohio Children's Hospital Association, Study of alternative means of providing and funding health care for children.
- Sacramento Regional Transit Authority. Customer satisfaction with rail and bus transit service.
- Ride On, the Montgomery County (MD) transit system. Customer satisfaction study and fare alteration study.
- Kansas City Area Transportation Authority. Customer satisfaction study.
- Champaign/Urbana. Key informant study of business executives, city executives, planners, and developers regarding plans and visions of development on a twenty year time horizon. First stage of a multi phase, multi year project.
- National Church Residences. Annual national study of satisfaction with housing services for the low-income elderly.
- Ohio Society of CPAs. Numerous studies of awareness of and satisfaction with continuing education services, online services, publications, governance, and other aspects of association business.
- United Way. Studies of brand awareness and service awareness among donors.
- Goodwill of Columbus. Study of service awareness and brand depth.

Key personnel

Dr. Hugh Clark is the project director and key researcher. Our successful approach to project performance is based on applying Dr. Clark's experience, knowledge, and time efficiently to projects. He personally interacts with the client, writes the research design, prepares the questionnaire, conducts the analysis and writes the report. This intensive use of the time of the primary company principal is made possible by our use of staff only in supporting roles, and a business model that relies on the best specialists in the nation to carry out the telephone data collection process. This process means, for example, that Dr. Clark need not spend his time managing such things as telephone interviewing facilities, data entry operations or other such functions.

The time has come and gone, when telephone interviewing was best handled locally by an in-house telephone operation. Today the multi-language and complex software capacities required, plus the need to protect the time of the principal researchers, makes subcontracting of this function the preferred method.

We rely on one of three telephone interviewing specialists with whom we have long term, proven relationships to conduct that aspect of the work. We decide among these providers depending on their availability and specific costs for a given project. For this study we will probably use Foresight Research Inc. Managed by Mr. Chris Stommel, Foresight annually conducts many thousands of telephone interviews with us. Their training and capacities are superb, and this frees Dr. Clark to provide only oversight, and not day to day phone bank management, leaving time for him play the role in consulting and analysis that a client needs.

The other providers are The Parker Group, and Pacific Market Research. All of these companies have excellent training and facilities. The websites for all three firms are:

<http://www.foresightresearch.com/>

<http://www.the-parker-group.com/>

<http://www.pacificmarketresearch.com/main.html>

Two senior researchers round out the project team on an as-needed basis. They are Dr. Kent Schwirian, and Dr. Joan Simon. Dr. Kent Schwirian, former chair of the Department of Sociology at The Ohio State University and now a research consultant and part time faculty will also participate in this study. Dr. Schwirian will provide two types of expertise to this study. First his long career has involved many issues of citizen perceptions of and involvement in city affairs. Second, he has great depth in methodological approaches, and provides internal peer review of approaches and content.

We do not anticipate that Dr. Simon will be involved in this study. However she is available should the need arise. Dr. Simon brings training and experience in both psychology and sociology to the project.

When other types of assistance are needed, it is provided by Ms. Pamela Heller, Ms. Selena Barlow. Typically this assistance is used when in-person data collection is needed in the case of key informant interviewing or administration of self-administered surveys, and editing of reports.

Backgrounds of key staff

Dr. Hugh Clark. His PH.D. in political science (Michigan State, 1972) led Dr. Clark to teach state and urban politics as an instructor at Michigan State University, then at Miami University of Ohio as an assistant professor. In 1975, after a year as visiting professor at Ohio Wesleyan University, Dr. Clark entered the more active area of applying his political knowledge to campaign strategy and research. This practice evolved from candidate orientation to issue orientation in the early 1980's. He now has a national practice with clients from Anchorage (AK) to Westchester County NY). His methodological expertise includes survey research, focus group and other qualitative methods, and analysis of secondary data.

Christopher Stommel, Foresight Research Prior to founding Foresight Research, Inc., Chris was a Research Manager at J.D. Power and Associates, Detroit, where he directed the Volkswagen and Audi of America accounts. BS in Marketing from Oakland University. Chris manages Foresight Research Operations.

Dr. Kent Schwirian. Ph.D., Sociology, University of Iowa. Dr. Schwirian has not only taught sociology for many years, but has published many studies on urban issues. For example, such articles include "Embattled Neighborhoods: The Political Ecology of Neighborhood Change," "Modeling Urbanism: Economic, Social, and Environmental Stress in Cities," "Effectiveness of Neighborhood Social Action: Local Ecology, Organizational Complexity, and Coalitional Embedding," and many others.

Dr. Joan Simon holds two Ph.D. degrees, both from The Ohio State University, one in Sociology and one in Psychology. Her dissertation for Sociology, written for Dr. Schwirian, involved a major study of the effects of gentrification on neighborhoods in the City of Columbus. Today she is a practicing psychologist on the faculty of the Department of Family Medicine at The Ohio State University, but also consults on selected studies on as-needed basis. She is also an owner of CJI Research and serves as its chair.

Selena Barlow, MBA in Marketing, University of Arizona. Ms. Barlow has worked with CJI Research since 1990, providing marketing expertise and managing projects. In addition, she assists with focus groups, questionnaire development, and with editing of reports. Prior to that time she managed marketing operations for transit systems in Tucson (AZ) and Miami (FL).

Pamela Heller, BA, The Ohio State University. From 1973 – 1993 she owned and managed Angeletti/Heller Advertising of Columbus. Ms Heller has worked with CJI Research since 2001. She began with us by managing data collection operations with Ms. Barlow in a large planning study for the Westchester County (NY) transportation authority. Since that time she has managed data collection or conducted key informant interviews for twelve other major CJI projects.

Sheila Dachner, BA, The Ohio State University. Ms. Dachner provides local assistance in Central Ohio with in-person interviewing. She also works with the US Census, collecting information in situations where data collection is especially difficult and requires highly skilled interventions.

References

Although the RFP called for three references, our work is diverse in terms of subject matter, and more than three references may help to provide a broader view. We would, however, suggest calling them in the order presented.

Ms. Marjory Pizzuti
Member, Upper Arlington Board of Education
President and CEO, Goodwill Industries
1331 Edgehill Rd
Grandview, OH 43212
614-583-0346

Prior to her role at Goodwill, Ms. Pizzuti was a Vice President at Children's Hospital, and prior to that an assistant director of the Department of Development of Ohio. Dr. Clark and CJI Research has worked with her frequently since 1982 in all of those positions and she is the person probably better able than any other current client to provide an overview of how we work and how we perform.

Mr. James Betts
Betts & Associates, Inc.
85 E. Gay Street, 11th Floor
Columbus, OH 43215
Ph: 614.221.7371

CJI recently completed a major statewide study of school funding for an organization of mayors and school administrators headed by Mr. Betts.

Jed Morison, Superintendent
Franklin County Board of Mental Retardation and Developmental Disabilities
2879 Johnstown Road
Columbus, Ohio 43219
(614) 342-5950

CJI has worked with the MRDD board for many years conducting local area surveys to determine service awareness among the general public, willingness to find services, and perceived satisfaction with agency performance.

Mr. James Hartley
Vice President for Membership and Technology
Ohio Society for CPAs
535 Metro Place South
Dublin, Ohio 43017
(614) 764-2727

CJI has worked with the Ohio Society since 1989 conducting many studies. Jim has been our client there since he joined their leadership team in the 1990's.

Meg Kester
InterCity Transit
526 Patterson S.E.
P.O. Box 659
Olympia, WA 98507-065
(360) 705—5842

CJI, with Selena Barlow, recently completed a study of the general public regarding alternative mobility options for Olympia, the capitol city of Washington state. The study involved a telephone interview survey, a self-administered survey on the transit vehicles, an online survey of employees of major corporations, and a newspaper public relations survey.

Timeline

The timeline shown below can vary somewhat depending on the time required for questionnaire and draft report reviews.

1. Kick-off meeting with client
Discuss final objectives and project plan. Week 1
2. Conduct key informant interviews with City staff and, if desirable, also with key community leaders. (Christmas and New Year holidays occur in this period and access to key informants is likely to be limited. Thus more time than normal is included) Weeks 1- 5
3. Report on key informant results and present initial survey draft for client comment Week 6
4. Revise questionnaire based on client comments and internal peer review and pre-test survey instrument Week 7
5. Finalize survey and prepare CATI interviewing program
Prepare sample Week 8
6. Conduct interviews Weeks 8 – 10
7. Submit report outline for comment and approval Week 11
8. Data analysis and report preparation Weeks 11 – 13
9. Submit initial draft report Week 13
10. Submit final report and make presentation to City Council Week 17

Cost Proposal

Two things govern the total cost of a survey, length of the questionnaire and size of the sample.

- Sample size affects interviewer hours and thus wages paid. There are few economies of scale. In terms of labor, the final interview costs as much to conduct as the first.
- The length of the survey also affects wages, but not as much as sample size because part of the cost is simply getting a willing respondent on the telephone. Once contact is established, then adding length to the survey has some effect, but it is limited.
- The more important effect of the length of the survey in minutes is that it reflects the number of questions. The number of questions directly affects professional fees because every aspect of the analysis becomes more complex. The more questions, the more tables and charts and possible combinations of the data.

<u>Length of survey</u>	<u>Sample size</u>	
	<u>600</u>	<u>800</u>
Fifteen minutes	\$29,247	\$34,135
Twenty minutes	\$35,563	\$41,523
Per completed interview (CPI)		
Length of survey		
Fifteen minutes	\$48.74	\$42.67
Twenty minutes	\$59.27	\$51.90

We are offering several options for pricing because we cannot be certain of the length of the survey.

The RFP requests a breakdown of costs. On the following page is a chart that details the components in terms of direct costs, overhead and fees for each combination. Additional detail can be provided as needed.

Please note that we do not "mark-up" our direct costs. The practice of marking-up creates a conflict of interest because the larger the sample size the more a vendor earns. Because we do not mark-up these direct costs, the sample size is irrelevant to us. In addition, if we find that we can obtain the interviewing services for less than the estimated cost, we pass along the savings to the client.

Options

Focus groups. Focus groups can be used after the survey to obtain further information from respondents. We assume that there would be:

- ◆ four groups,
- ◆ each lasting approximately 90 minutes,
- ◆ professionally recruited, but recruited from among people interviewed for the survey, and thus "pre-screened."

- ♦ We will pay cash incentives to assure lack of positive bias in attendance (i.e. you do not want only volunteers to attend because they just love everything about Gahanna. The way to avoid that – the way it is done commercially -- is to pay people.)
- ♦ Groups to be held in a public facility meeting room such as at a library
- ♦ Full written report.

Assuming all of these parameters, a reasonable "not to exceed" budget would be \$3,645 per group, or \$14,580 for four groups. If the groups can be conducted in a free local space arranged and provided by The City (thus saving facilities charges), charges could be reduced by as much as \$500 per group.

E-Survey. Since we would have already developed the concept and detailed questions of the questionnaire for the phone survey, there would be no major charge for developing a separate e-survey questionnaire. However there would be direct costs and we would have to go through more data processing and writing to incorporate the data into the final report. Of course, since it would not constitute a random sample, those results would have to be separate from the sample survey and would not be representative of the public. A typical e-Survey involves direct sub-contractor costs not to exceed \$4500 for programming and hosting on the web. In addition, professional charges for processing the e-Survey data and incorporating those results into the telephone survey report would not exceed \$3,000. This supplementary report would include appropriate statistics and lists of open-end responses and comments only.

Conducting and paying for publicity for the survey (so that people would go to the website to take it) are the responsibility of The City.

The cost proposal is valid and is firm through the duration of the project except by mutual agreement of the City of Gahanna and CJI Research Corporation.



Hugh M. Clark
President
CJI Research Corporation