

Council Meeting of  
August 21, 2007

Honorable Mayor and Members  
of the City Council  
City Hall  
Torrance, California

**Members of the City Council:**

**SUBJECT: Community Development - Award of Consulting Services Agreement to Fairbank, Maslin, Maullin & Associates to conduct statistically-valid Telephone Surveys of the Residential and Business Communities to be used for the Strategic Plan Update**

**Expenditure: \$48,226.50 (includes 5% contingency of \$2,296.50)**

**RECOMMENDATION**

The Community Development Director recommends that the City Council award a Consulting Services Agreement to Fairbank, Maslin, Maullin & Associates (FMMA) to conduct statistically-valid telephone surveys of the residential and business communities in the amount of \$45,930 plus approval of a 5% contingency of \$2,296.50.

Funding: Funding is available from Strategic Plan Project – FEAP366.

**BACKGROUND**

The City of Torrance adopted its first Strategic Plan in 1996 which involved extensive Community input through the use of focus groups and statistically-valid telephone surveys of the residential and business communities. The Strategic Plan is a living document identifying those issues that are important to the Community.

The first update was completed in 1999. The update process closely mirrored the initial strategic planning process as it was extensive in the gathering and analysis of data. Based on those findings, the Strategic Plan Committee determined that the 1996 Strategic Plan priorities continued to reflect the Community's needs and the goals and sub-goals as outlined in the 1996 Strategic Plan were affirmed.

As we commence the next update, the statistically-valid telephone surveys of the residential community and local businesses, and the updated community profile/environmental scan must be completed.

Two separate Requests for Proposals were sent to a list of consultants fitting two categories, those qualified to conduct a statistically-valid telephone survey of the

residential and business communities and those qualified to prepare an updated community profile/environmental scan. The deadline for submitting proposals was March 29, 2007. Two (2) proposals for conducting a telephone survey of the residential and business community were received. Staff conducted interviews in May – June 2007. Based on the interviews, proposals, reference checks, and after reviewing sample documents submitted by the consultants, staff determined that FMMA was the most qualified to perform the public opinion surveys of the residential and business communities.

### **ANALYSIS**

FMMA will perform the following work:

- A statistically-valid telephone survey of the residential community designed to take 20 minutes on average to respond to the survey. FMMA will use a Random-Digit-Dial (RDD) sample of 500 respondents, 18 years and older. RDD sampling selects blocks of listed and unlisted residential telephone numbers in a completely random fashion, thus assuring that the results are valid for the entire population universe within the margin of error for the sample size. The interviews will be conducted in English, Spanish or Japanese language to satisfy the preferred language of the respondents.
- A statistically-valid public opinion survey of the business community designed to take 20 minutes on average to respond to the survey. FMMA will conduct 300 interviews among respondents drawn at random from a City-provided list of business licensees. The interviews would be conducted in English.

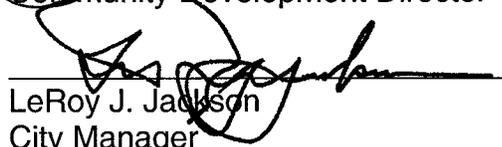
Respectfully submitted,

JEFFERY W. GIBSON  
Community Development Director

By   
Linda Cessna  
Deputy Community Development Director

Concur:

  
\_\_\_\_\_  
Jeffery W. Gibson  
Community Development Director

  
\_\_\_\_\_  
LeRoy J. Jackson  
City Manager

Attachment: Agreement

X:Planning/RCutting/StrategicPlan/AwardContract-FMMA.doc

## CONSULTING SERVICES AGREEMENT

This CONSULTING SERVICES AGREEMENT (“Agreement”) is made and entered into as of August 21, 2007 (the “Effective Date”), by and between the CITY OF TORRANCE, a municipal corporation (“CITY”), and Fairbank, Maslin, Maullin & Associates, a California Corporation (“CONSULTANT”).

### RECITALS:

- A. The CITY wishes to retain the services of an experienced and qualified CONSULTANT to design, conduct, analyze and prepare findings of a public opinion survey via phone samplings directed at residents and the business community. The purpose of the survey is to collect impartial, reliable and valid data assessing the requisite goals and objectives as currently outlined in the Strategic Plan.
- B. In order to obtain the desired services, the CITY has circulated its Request for Proposal for Updating the Strategic Plan Public Opinion Survey, RFP No. RFP No. RFP B2007-15. (the “RFP”).
- C. CONSULTANT has submitted a Proposal (the “Proposal”) in response to the RFP. In its Proposal CONSULTANT represents that it is qualified to perform those services requested in the RFP. Based upon its review of all proposals submitted in response to the RFP, the CITY is willing to award the contract to CONSULTANT.

### AGREEMENT:

#### 1. SERVICES TO BE PERFORMED BY CONSULTANT

CONSULTANT will provide the services and install those materials listed in CONSULTANT’s Proposal submitted in response to the RFP. A copy of the RFP is attached as Exhibit A. A copy of the Proposal is attached as Exhibit B.

#### 2. TERM

Unless earlier terminated in accordance with Paragraph 4 below, this Agreement will continue in full force and effect from the Effective Date through August 21, 2008.

#### 3. COMPENSATION

##### A. CONSULTANT’s Fee.

For services rendered pursuant to this Agreement, CONSULTANT will be paid in accordance with the compensation schedule set forth in the Proposal; provided, however, that in no event will the total amount of money paid the CONSULTANT, for services initially contemplated by this Agreement, exceed the sum of \$45,930.00 (“Agreement Sum”), unless otherwise first approved in writing by the CITY.

##### B. Schedule of Payment.

Provided that the CONSULTANT is not in default under the terms of this Agreement, upon presentation of an invoice, CONSULTANT will be paid monthly, within 30 days after the date of the monthly invoice.

#### 4. **TERMINATION OF AGREEMENT**

##### A. Termination by CITY for Convenience.

1. CITY may, at any time, terminate the Agreement for CITY's convenience and without cause.
2. Upon receipt of written notice from CITY of such termination for CITY's convenience, CONSULTANT will:
  - a. cease operations as directed by CITY in the notice;
  - b. take actions necessary, or that CITY may direct for the protection and preservation of the work; and
  - c. except for work directed to be performed prior to the effective date of termination stated in the notice, terminate all existing subcontracts and purchase orders and enter into no further subcontracts and purchase orders.
3. In case of such termination for CITY's convenience, CONSULTANT will be entitled to receive payment for work executed; and costs incurred by reason of such termination, along with reasonable overhead and profit on the work not executed.

##### B. Termination for Cause.

1. If either party fails to perform any term, covenant or condition in this Agreement and that failure continues for 15 calendar days after the nondefaulting party gives the defaulting party notice of the failure to perform, this Agreement may be terminated for cause; provided, however, that if during the notice period the defaulting party has promptly commenced and continues diligent efforts to remedy the default, the defaulting party will have such additional time as is reasonably necessary to remedy the default.
2. In the event this Agreement is terminated for cause by the default of the CONSULTANT, the CITY may, at the expense of the CONSULTANT and its surety, complete this Agreement or cause it to be completed. Any check or bond delivered to the CITY in connection with this Agreement, and the money payable thereon, will be forfeited to and remain the property of the CITY. All moneys due the CONSULTANT under the terms of this Agreement will be retained by the CITY, but the retention will not release the CONSULTANT and its surety from liability for the default. Under these circumstances, however, the CONSULTANT and its surety will be credited with the amount of money retained, toward any amount by which the cost of completion exceeds the Agreement Sum and any amount authorized for extra services.
3. Termination for cause will not affect or terminate any of the rights of the CITY as against the CONSULTANT or its surety then existing, or which may thereafter accrue because of the default; this provision is in addition to all other rights and remedies available to the CITY under law.

C. Termination for Breach of Law.

In the event the CONSULTANT or any of its officers, directors, shareholders, employees, agents, subsidiaries or affiliates is convicted (i) of a criminal offense as an incident to obtaining or attempting to obtain a public or private contract or subcontract, or in the performance of a contract or subcontract; (ii) under state or federal statutes of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, or any other offense indicating a lack of business integrity or business honesty which currently, seriously, and directly affects responsibility as a public consultant or contractor; (iii) under state or federal antitrust statutes arising out of the submission of bids or proposals; or (iv) of violation of Paragraph 19 of this Agreement; or for any other cause the City determines to be so serious and compelling as to affect CONSULTANT's responsibility as a public consultant or contractor, including but not limited to, debarment by another governmental agency, then the CITY reserves the unilateral right to terminate this Agreement or to impose such other sanctions (which may include financial sanctions, temporary suspensions or any other condition deemed appropriate short of termination) as it deems proper. The CITY will not take action until CONSULTANT has been given notice and an opportunity to present evidence in mitigation.

5. **FORCE MAJEURE**

If any party fails to perform its obligations because of strikes, lockouts, labor disputes, embargoes, acts of God, inability to obtain labor or materials or reasonable substitutes for labor or materials, governmental restrictions, governmental regulations, governmental controls, judicial orders, enemy or hostile governmental action, civil commotion, fire or other casualty, or other causes beyond the reasonable control of the party obligated to perform, then that party's performance shall be excused for a period equal to the period of such cause for failure to perform.

6. **RETENTION OF FUNDS**

CONSULTANT authorizes the CITY to deduct from any amount payable to CONSULTANT (whether or not arising out of this Agreement) any amounts the payment of which may be in dispute or that are necessary to compensate the CITY for any losses, costs, liabilities, or damages suffered by the CITY, and all amounts for which the CITY may be liable to third parties, by reason of CONSULTANT's acts or omissions in performing or failing to perform CONSULTANT's obligations under this Agreement. In the event that any claim is made by a third party, the amount or validity of which is disputed by CONSULTANT, or any indebtedness exists that appears to be the basis for a claim of lien, the CITY may withhold from any payment due, without liability for interest because of the withholding, an amount sufficient to cover the claim. The failure of the CITY to exercise the right to deduct or to withhold will not, however, affect the obligations of CONSULTANT to insure, indemnify, and protect the CITY as elsewhere provided in this Agreement.

7. **THE CITY'S REPRESENTATIVE**

Linda Cessna is designated as the "City Representative," authorized to act in its behalf with respect to the work and services specified in this Agreement and to make all decisions in connection with this Agreement. Whenever approval, directions, or other actions are required by the CITY under this Agreement, those actions will be taken by the City Representative, unless otherwise stated. The City Manager has the right to designate another City Representative at any time, by providing notice to CONSULTANT.

8. **CONSULTANT REPRESENTATIVE(S)**

The following principal(s) of CONSULTANT are designated as being the principal(s) and representative(s) of CONSULTANT authorized to act in its behalf with respect to the work specified in this Agreement and make all decisions in connection with this Agreement:

Richard Maullin, PhD, President  
Richard Bernard, Ph.D, Senior Vice President

9. **INDEPENDENT CONTRACTOR**

The CONSULTANT is, and at all times will remain as to the CITY, a wholly independent contractor. Neither the CITY nor any of its agents will have control over the conduct of the CONSULTANT or any of the CONSULTANT's employees, except as otherwise set forth in this Agreement. The CONSULTANT may not, at any time or in any manner, represent that it or any of its agents or employees are in any manner agents or employees of the CITY.

10. **BUSINESS LICENSE**

The CONSULTANT must obtain a City business license prior to the start of work under this Agreement, unless CONSULTANT is qualified for an exemption.

11. **OTHER LICENSES AND PERMITS**

CONSULTANT warrants that it has all professional, contracting and other permits and licenses required to undertake the work contemplated by this Agreement.

12. **FAMILIARITY WITH WORK**

By executing this Agreement, CONSULTANT warrants that CONSULTANT (a) has thoroughly investigated and considered the scope of services to be performed, (b) has carefully considered how the services should be performed, and (c) fully understands the facilities, difficulties and restrictions attending performance of the services under this Agreement. If the services involve work upon any site, CONSULTANT warrants that CONSULTANT has or will investigate the site and is or will be fully acquainted with the conditions there existing, prior to commencement of services set forth in this Agreement. Should CONSULTANT discover any latent or unknown conditions that will materially affect the performance of the services set forth in this Agreement, CONSULTANT must immediately inform the CITY of that fact and may not proceed except at CONSULTANT's risk until written instructions are received from the CITY.

13. **CARE OF WORK**

CONSULTANT must adopt reasonable methods during the term of the Agreement to furnish continuous protection to the work, and the equipment, materials, papers, documents, plans, studies and other components to prevent losses or damages, and will be responsible for all damages, to persons or property, until acceptance of the work by the CITY, except those losses or damages as may be caused by the CITY's own negligence.

14. **CONSULTANT'S ACCOUNTING RECORDS; OTHER PROJECT RECORDS**

Records of the CONSULTANT's time pertaining to the project, and records of accounts between the CITY and the CONSULTANT, will be kept on a generally recognized accounting basis. CONSULTANT will also maintain all other records, including without limitation specifications, drawings, progress reports and the like, relating to the project. All records will be available to the CITY during normal working hours. CONSULTANT will maintain these records for three years after final payment.

**15. INDEMNIFICATION**

CONSULTANT will indemnify, defend, and hold harmless CITY, the City Council, each member thereof, present and future, its officers, agents and employees from and against any and all liability, expenses, including defense costs and legal fees, and claims for damages whatsoever, including, but not limited to, those arising from breach of contract, bodily injury, death, personal injury, property damage, loss of use, or property loss however the same may be caused and regardless of the responsibility for negligence. The obligation to indemnify, defend and hold harmless includes, but is not limited to, any liability or expense, including defense costs and legal fees, arising from the negligent acts or omissions, or willful misconduct of CONSULTANT, its officers, employees, agents, subcontractors or vendors. It is further agreed, CONSULTANT's obligations to indemnify, defend and hold harmless will apply even in the event of concurrent negligence on the part of CITY, the City Council, each member thereof, present and future, or its officers, agents and employees, except for liability resulting solely from the negligence or willful misconduct of CITY, its officers, employees or agents. Payment by CITY is not a condition precedent to enforcement of this indemnity. In the event of any dispute between CONSULTANT and CITY, as to whether liability arises from the sole negligence of the CITY or its officers, employees, agents, subcontractors or vendors, CONSULTANT will be obligated to pay for CITY's defense until such time as a final judgment has been entered adjudicating the CITY as solely negligent. CONSULTANT will not be entitled in the event of such a determination to any reimbursement of defense costs including but not limited to attorney's fees, expert fees and costs of litigation.

**16. NON-LIABILITY OF THE CITY'S OFFICERS AND EMPLOYEES**

No officer or employee of the CITY will be personally liable to CONSULTANT, in the event of any default or breach by the CITY or for any amount that may become due to CONSULTANT.

**17. INSURANCE**

A. CONSULTANT must maintain at its sole expense the following insurance, which will be full coverage not subject to self insurance provisions:

- (1) Automobile Liability, including owned, non-owned and hired vehicles, with at least the following limits of liability:
  - (a) Primary Bodily Injury with limits of at least \$500,000 per person, \$1,000,000 per occurrence; and
  - (b) Primary Property Damage of at least \$250,000 per occurrence; or
  - (c) Combined single limits of \$1,000,000 per occurrence.
- (2) General Liability including coverage for premises, products and completed operations, independent contractors/vendors, personal injury and contractual obligations with combined single limits of coverage of at least \$1,000,000 per occurrence.
- (3) Professional liability insurance with limits of at least \$1,000,000 per occurrence.

(4) Workers' Compensation with limits as required by the State of California and Employers Liability with limits of at least \$1,000,000.

- B. The insurance provided by CONSULTANT will be primary and non-contributory.
- C. CITY, the City Council and each member thereof, members of boards and commissions, every officer, agent, official, employee and volunteer must be named as additional insured under the automobile and general liability policies.
- D. CONSULTANT must provide certificates of insurance and/or endorsements to the City Clerk of the City of Torrance before the commencement of work.
- E. Each insurance policy required by this Paragraph must contain a provision that no termination, cancellation or change of coverage can be made without thirty days notice to CITY.

**18. SUFFICIENCY OF INSURERS**

Insurance required by this Agreement will be satisfactory only if issued by companies admitted to do business in California, rated "B+" or better in the most recent edition of Best's Key Rating Guide, and only if they are of a financial category Class VII or better, unless these requirements are waived by the Risk Manager of the CITY ("Risk Manager") due to unique circumstances. In the event the Risk Manager determines that the work or services to be performed under this Agreement creates an increased or decreased risk of loss to the CITY, the CONSULTANT agrees that the minimum limits of any insurance policies and/or performance bond required by this Agreement may be changed accordingly upon receipt of written notice from the Risk Manager; provided that CONSULTANT will have the right to appeal a determination of increased coverage by the Risk Manager to the City Council of the CITY within 10 days of receipt of notice from the Risk Manager.

**19. CONFLICT OF INTEREST**

- A. No officer or employee of the CITY may have any financial interest, direct or indirect, in this Agreement, nor may any officer or employee participate in any decision relating to the Agreement that effects the officer or employee's financial interest or the financial interest of any corporation, partnership or association in which the officer or employee is, directly or indirectly interested, in violation of any law, rule or regulation.
- B. No person may offer, give, or agree to give any officer or employee or former officer or employee, nor may any officer or employee solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any way pertaining to any program requirement, contract or subcontract, or to any solicitation or proposal.

**20. NOTICE**

A. All notices, requests, demands, or other communications under this Agreement will be in writing. Notice will be sufficiently given for all purposes as follows:

- (1) Personal delivery. When personally delivered to the recipient: notice is effective on delivery.
- (2) First Class mail. When mailed first class to the last address of the recipient known to the party giving notice: notice is effective three mail delivery days after deposit in an United States Postal Service office or mailbox.
- (3) Certified mail. When mailed certified mail, return receipt requested: notice is effective on receipt, if delivery is confirmed by a return receipt.
- (4) Overnight delivery. When delivered by an overnight delivery service, charges prepaid or charged to the sender's account: notice is effective on delivery, if delivery is confirmed by the delivery service.
- (5) Facsimile transmission. When sent by fax to the last fax number of the recipient known to the party giving notice: notice is effective on receipt. Any notice given by fax will be deemed received on the next business day if it is received after 5:00 p.m. (recipient's time) or on a non-business day.

Addresses for purpose of giving notice are as follows:

CONSULTANT: Richard Maullin, PhD, President  
 2425 Colorado Avenue, Suite 180  
 Santa Monica, CA 90404  
 Phone: 310.828.1183  
 Fax: 310.453.6562

CITY: City Clerk  
 City of Torrance  
 3031 Torrance Boulevard  
 Torrance, CA 90509-2970  
 Fax: (310) 618-2931

- B. Any correctly addressed notice that is refused, unclaimed, or undeliverable because of an act or omission of the party to be notified, will be deemed effective as of the first date the notice was refused, unclaimed or deemed undeliverable by the postal authorities, messenger or overnight delivery service.
- C. Either party may change its address or fax number by giving the other party notice of the change in any manner permitted by this Agreement.

21. **PROHIBITION AGAINST ASSIGNMENT AND SUBCONTRACTING**

This Agreement and all exhibits are binding on the heirs, successors, and assigns of the parties. The Agreement may not be assigned or subcontracted by either the CITY or CONSULTANT without the prior written consent of the other.

22. **INTEGRATION; AMENDMENT**

This Agreement represents the entire understanding of the CITY and CONSULTANT as to those matters contained in it. No prior oral or written understanding will be of any force or effect with respect to the terms of this Agreement. The Agreement may not be modified or altered except in writing signed by both parties.

23. **INTERPRETATION**

The terms of this Agreement should be construed in accordance with the meaning of the language used and should not be construed for or against either party by reason of the authorship of this Agreement or any other rule of construction that might otherwise apply.

24. **SEVERABILITY**

If any part of this Agreement is found to be in conflict with applicable laws, that part will be inoperative, null and void insofar as it is in conflict with any applicable laws, but the remainder of the Agreement will remain in full force and effect.

25. **TIME OF ESSENCE**

Time is of the essence in the performance of this Agreement.

26. **GOVERNING LAW; JURISDICTION**

This Agreement will be administered and interpreted under the laws of the State of California. Jurisdiction of any litigation arising from the Agreement will be in Los Angeles County, California.

27. **COMPLIANCE WITH STATUTES AND REGULATIONS**

CONSULTANT will be knowledgeable of and will comply with all applicable federal, state, county and city statutes, rules, regulations, ordinances and orders.

28. **WAIVER OF BREACH**

No delay or omission in the exercise of any right or remedy by a nondefaulting party on any default will impair the right or remedy or be construed as a waiver. A party's consent or approval of any act by the other party requiring the party's consent or approval will not be deemed to waive or render unnecessary the other party's consent to or approval of any subsequent act. Any waiver by either party of any default must be in writing and will not be a waiver of any other default concerning the same or any other provision of this Agreement.

29. **ATTORNEY'S FEES**

Except as set forth in Paragraph 15, in any dispute, litigation, arbitration, or other proceeding by which one party either seeks to enforce its rights under this Agreement (whether in contract, tort or both) or seeks a declaration of any rights or obligations under this Agreement, the prevailing party will be awarded reasonable attorney's fees, together with any costs and expenses, to resolve the dispute and to enforce any judgment.

**30. EXHIBITS**

All exhibits identified in this Agreement are incorporated into the Agreement by this reference.

**31. CONSULTANT'S AUTHORITY TO EXECUTE**

The person(s) executing this Agreement on behalf of the CONSULTANT warrant that (i) the CONSULTANT is duly organized and existing; (ii) they are duly authorized to execute this Agreement on behalf of the CONSULTANT; (iii) by so executing this Agreement, the CONSULTANT is formally bound to the provisions of this Agreement; and (iv) the entering into this Agreement does not violate any provision of any other Agreement to which the CONSULTANT is bound.

CITY OF TORRANCE,  
a Municipal Corporation

Fairbank, Maslin, Maullin & Associates  
a California Corporation

\_\_\_\_\_  
Frank Scotto, Mayor

By: \_\_\_\_\_  
Richard Maullin, PhD, President

ATTEST:

\_\_\_\_\_  
Sue Herbers, City Clerk

APPROVED AS TO FORM:

JOHN L. FELLOWS III  
City Attorney

By: \_\_\_\_\_

Attachments:      Exhibit A:      RFP  
                         Exhibit B:      Proposal

Revised..:      1/30/01

**EXHIBIT A**  
**REQUEST FOR PROPOSALS**

CITY OF TORRANCE  
3031 Torrance Blvd.  
Torrance, CA 90503

RFP NO. RFP B2007-15

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**Request for Proposal for Updating the Strategic Plan's Public Opinion Survey**

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**PROPOSAL SUBMITTAL INFORMATION**

PLACE: CITY OF TORRANCE  
Office of the City Clerk  
3031 Torrance Blvd.  
Torrance, CA 90503

DEADLINE: 2:00 PM

DATE: Thursday, March 29, 2007

The **ORIGINAL, PLUS TWO (2) COPIES** of the PROPOSAL must be submitted in a sealed envelope and marked with the RFP number and title.

PROPOSALS MAY BE MAILED OR HAND DELIVERED. NO FAXED PROPOSALS WILL BE ACCEPTED. LATE PROPOSALS WILL NOT BE ACCEPTED. Proposals will be opened and publicly read aloud at 2:15 P.M. on the same date in the Council Chambers, Torrance City Hall.

**All responses must include the following components:**

- Proposer's Response (Section III of this document). You must submit your response on the forms provided. (If additional space is required, please attach additional pages.)
- Proposer's Affidavit (Attachment 1)

Any questions regarding this proposal should be directed to:

Jeffery W. Gibson  
Community Development Director  
City of Torrance  
Attn: Rebecca Cutting, Project Manager  
General Plan Division  
(310) 618-5990

During the proposal period, all questions must be posted in writing and mailed, emailed, or faxed by 2:00 p.m. Thursday, March 29, 2007. No verbal responses will be given. Written responses to all substantive questions will be mailed, e-mailed, or faxed to all firms that receive this RFP.

**CITY OF TORRANCE  
3031 Torrance Blvd.  
Torrance, CA 90503**

**RFP NO. RFP B2007-15**

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**Request for Proposal for Updating the Strategic Plan's Public Opinion Survey**

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**SECTION I RFP INSTRUCTIONS AND INFORMATION**

Notice is hereby given that sealed proposals will be received in the office of the City Clerk, City Hall, 3031 Torrance Boulevard, Torrance, CA, until 2:00 p.m. on Thursday, March 29, 2007, and will be opened and publicly read aloud at 2:15 p.m. on the same date in the Council Chambers, Torrance City Hall. You are invited to be present at the opening of proposals. An original and two copies of each proposal must be submitted in a sealed envelope and clearly marked: "PROPOSAL FOR Updating the Strategic Plan's Public Opinion Survey, RFP B2007-15."

**Proposal Form:**

The proposal must be made on the form provided for that purpose, enclosed in a sealed envelope, and marked "Proposal for Updating the Strategic Plan's Community Profile/Environmental Scan RFP B2007-15") and addressed to the City Clerk, City of Torrance, 3031 Torrance Blvd. Torrance CA. 90503. If the proposal is made by an individual, it must be signed by that individual, and an address, telephone (and fax number if available) must be given. If made by a business entity, it must be signed by the person(s) authorized to execute agreements and bind the entity to contracts. A full business address, telephone (and fax number if available) must be given. No telegraphic, fax or telephonic proposal will be considered.

Blank spaces in the proposal form must be filled in, using ink, indelible pencil, or typewriter, and the text of the proposal form must not be changed. No additions to the form may be made. Any unauthorized conditions, limitations, or provisos attached to a proposal will render it informal and may cause its rejection. Alterations by erasure or interlineations must be explained or noted in the proposal form over the signature of the Proposer.

**Reservation:**

The City reserves the right to revise or amend these specifications prior to the date set for opening proposals. Revisions and amendments, if any, will be announced by an addendum to this RFP. If the revisions require additional time to enable Proposers to respond, the City may postpone the opening date accordingly. In such case, the addendum will include an announcement of the new opening date.

All addenda must be attached to the proposal. Failure to attach any addendum may render the proposal non-responsive and cause it to be rejected.

The City Council reserves the right to reject any and all proposals received, to take all proposals under advisement for a period not to exceed ninety (90) days after the date of the opening, to waive any informality on any proposal, and to be the sole judge of the relative merits of the material and or service mentioned in the respective proposals received. The City reserves the right to reject any proposal not accompanied with all data or information required.

This Request for Proposal (RFP) does not commit the City to award a contract or to pay any cost incurred in the preparation of a proposal. All responses to this RFP document become the property of the City of Torrance.

**Affidavit:**

An affidavit form is enclosed. It must be completed signifying that the proposal is genuine and not collusive or made in the interest or on behalf of any person not named in the proposal, that the Proposer has not directly or indirectly induced or solicited any other Proposer to put in a sham proposal or any other person, firm, or corporation to refrain from proposing, and that the Proposer has not in any manner sought by collusion to secure for itself an advantage over any other Proposer. Any proposal submitted without an affidavit or in violation of this requirement will be rejected.

**Standards of Evaluation:**

The proposals will be evaluated by a committee comprised of members of the City staff. The evaluation of the proposals may take any of the following into consideration:

- The completeness of information provided in the proposed Scope of Services and demonstrated general understanding of the City's needs.
- The qualifications of the Project Team (including sub-consultants) to perform the project services.
- The information supplied in the list of Representative Projects.
- Information obtained from the references supplied for the Representative Projects.
- The quality of the specific method to be employed by the firm, as detailed in the firm's Proposed Scope of Services.
- The project understanding demonstrated by the firm's Recommended Scope of Services and Level of Effort.
- The time of completion and manpower allocation detailed in the schedule provided by the firm.
- The fee proposal.

The fee proposal shall provide at minimum:

- The project team members required to perform each task.
- The number of hours to be expended by each Project Team member to perform each task.
- The hourly rates for all employee classifications that will be billed to this project.
- Calculated delivery and cost.
- A list of expected reimbursable items and a not-to-exceed budget for reimbursable items.

The evaluation of the proposals will result in a ranking of the candidates. At this point, the City may decide to interview a short list of candidates to augment the information for rankings, or the City may consider the ranking to the final candidate ranking. Upon finalizing the candidate ranking, the City may decide to enter into fee negotiations with the number one ranked candidate. If agreement is reached on the fee structure, the City may enter into an agreement with this candidate. If agreement cannot be reached, the City may enter into fee negotiations with the number two candidate. This procedure will be followed until an agreement equitable to both the City and the consultant can be agreed upon.

**CITY OF TORRANCE  
3031 Torrance Blvd.  
Torrance, CA 90503**

**RFP NO. RFP B2007-15**

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**Request for Proposal for Updating the Strategic Plan's Public Opinion Survey**

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**SECTION II TECHNICAL REQUIREMENTS**

**Introduction:**

The following technical requirements describe the desired work to be performed for the updating of the Strategic Plan Public Opinion Survey.

This RFP is intended to be as descriptive as possible. However, Proposers may not take advantage of omissions or oversights in this document. Proposers must supply products and services that meet or exceed the requirements of this RFP. In the event of a dispute over installation or performance, the needs of the City of Torrance will govern.

**BACKGROUND AND OBJECTIVES:**

The Public Opinion Survey is an information document intended for use by the Torrance City Council and residents in reviewing and possibly updating the Torrance Strategic Plan. As such, the Public Opinion Survey must provide an up to date assessment of the City's success in addressing and/or achieving identified Strategic Priorities, Goals, and Sub-goals, as well as an indication of future trends. Document format and design also are important considerations, in part because the Survey may also function as a public relations document that portrays the "state" of the City.

The City first adopted a Strategic Plan in 1996 and completed its first three-year update in 1999. In 1999, the update cycle was amended to allow for either a three- or five-year update, depending upon the results of a Community Profile and statistically valid phone surveys. Preparation of the Community Profile, in conjunction with phone surveys of residents and the business community, will determine the timing of the next update.

The Torrance Strategic Plan is intended and used to guide City actions and programs based on the community's vision for the future. It aids in the determination of priorities for the allocation of resources, in conjunction with community vision as well as other issues such as needed improvements to an aging City infrastructure and community security. Further, the Strategic Plan guides development of the City's budget.

**General Requirements:**

The City of Torrance is seeking a consultant to design, conduct, analyze and prepare findings of an opinion survey via phone samplings directed at residents and the business community. The purpose of the survey is to collect impartial, reliable and valid data assessing the requisite goals and objectives as currently outlined in the Strategic Plan.

- Work with City Staff to prepare specific questions intended to evaluate City Services and existing Strategic Plan goals and sub-goals.
- Development of survey questionnaire
- Conduct Survey
- Tabulate survey responses
- Evaluate response and prepare report outlining conclusions
- Presentation of Findings to the City Council and staff

**Work to be Performed by Proposer:**

Consultant shall provide the following services:

✓ **RESIDENTIAL SURVEY – Statistically Valid Survey**

- Survey instrument development
- Random Digit Dialing Telephone Survey
- Sampling
- Interviews – English, Spanish & Japanese
- Coding
- Data Processing
- Data Analysis
- Final Report – margin of error at the 95% confidence level for survey results
- Presentation

✓ **BUSINESS SURVEY – Statistically Valid Survey**

- Survey instrument development
- Random Digit Dialing Telephone Survey
- English Language Interviews
- Coding
- Data Processing
- Data Analysis
- Final Report - margin of error at the 95% confidence level for survey results
- Presentation

**Proposal Submittals:**

Each proposal must contain:

A. 1. *Cover Letter*

All proposals must be accompanied by a cover letter, signed by the individual authorized to bind the proposing entity.

2. *Identification of Proposer*

Include name, address, and telephone number of individual firm, and relevant persons.

3. *Qualifications, Experience, and Technical Competence of Individuals Performing Work*

Highlight experience of firm related to preparing community telephone surveys; preparing, distributing and analyzing community surveys and sample of surveys performed and key staff in successfully completing similar projects. Identify individuals who will be working on this project, according to their respective roles and responsibilities and including the time allocated for their services. Outline relative past and present experience, including individual projects and names of

references relative to these projects. Include resumes and identify project manager. Confirm if project manager is also to be liaison with City staff.

4. *Project Overview and Approach to Accomplish Work*

Provide detailed description of the approach to undertaking and completing the proposed project. Include any steps/tasks not included in "Scope of Work" that may affect the quality of the project if omitted.

5. *Budget*

Provide a detailed fee schedule.

6. *Schedule Time Line*

Proposed time commitment to the project and schedule for completion. Include availability of key personnel.

7. *References*

Provide a minimum of three references for similar work, including contact person, addresses and phone numbers, plus a description of the work performed.

**The Contract:**

The Proposer selected by the City will be required to enter into a written contract with the City of Torrance, in the form attached. A copy of this request for professional services will be attached to and become a part of the contract.

**Strategic Plan:**

Attached is a copy of the Strategic Plan for the City of Torrance.

CITY OF TORRANCE  
3031 Torrance Blvd.  
Torrance, CA 90503

RFP NO. RFP B2007-15

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**Request for Proposal for Updating the Strategic Plan's Public Opinion Survey**

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**SECTION III PROPOSAL**

FAILURE TO COMPLETE ALL ITEMS IN THIS SECTION MAY INVALIDATE PROPOSAL.

In accordance with your "Request for Proposal," the following proposal is submitted to the City of Torrance.

**Proposal Submitted By:**

\_\_\_\_\_  
Name of Company

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip Code

\_\_\_\_\_  
Printed Name/Title

\_\_\_\_\_  
Telephone Number/Fax Number

**Form of Business Organization:**

Please indicate the following (check one);

Corporation \_\_\_\_\_ Partnership \_\_\_\_\_ Sole Proprietorship \_\_\_\_\_

Other: \_\_\_\_\_

**Business History:**

How long have you been in business under your current name and form of business organization?

\_\_\_\_\_ years

If less than three (3) years and your company was in business under a different name, what was that name?

**Contact for Additional Information:**

Please provide the name of the individual at your company to contact for any additional information

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Telephone Number/Fax Number

**Addenda Received:**

Please indicate addenda information you have received regarding this proposal:

Addendum No. \_\_\_\_ Date Received: \_\_\_\_\_  
Addendum No. \_\_\_\_ Date Received: \_\_\_\_\_  
Addendum No. \_\_\_\_ Date Received: \_\_\_\_\_  
Addendum No. \_\_\_\_ Date Received: \_\_\_\_\_

\_\_\_\_\_ No Addenda received regarding this proposal.

**Payment Terms:**

Are you proposing any discounts for early payments?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, what are your discounted invoice terms? \_\_\_\_\_

**Delivery:**

What is the lead time for delivery? \_\_\_\_\_ days/weeks

**References:**

Please supply the names of companies/agencies for whom you recently supplied comparable goods or services as requested in this RFP.

\_\_\_\_\_  
Name of Company/Agency                      Address                      Person to contact/Telephone No.

Name of Company/Agency                      Address                      Person to contact/Telephone No.

Name of Company/Agency                      Address                      Person to contact/Telephone No.

**Costs:** For updating the Strategic Plan’s Public Opinion Survey per RFP B2007-15 as specified.                      \$ \_\_\_\_\_

**Additional costs (please specify)**                      \$ \_\_\_\_\_

**Grand Total**                      \$ \_\_\_\_\_

Proposer must complete each item with either a check mark to indicate that the item being proposed is exactly as specified, or enter a description in the Proposer’s comments column to indicate any deviation from the specifications of the item being proposed.

SERVICE SPECIFICATION COLUMN	PROPOSER’S COMMENTS COLUMN
For updating the Strategic Plan’s Public Opinion Survey per RFP B2007-15 as specified.	

**Submittals:** Please indicate that the following are included with your proposal:

<b>Submittal Requirements</b>	<b>Check here if included:</b>
Cover letter	
Identification of proposer	
Qualifications, experience and technical competence of individuals performing work	
Project overview and approach to accomplish work	
Budget	
Schedule/ time line	
References	



**EXHIBIT B**  
**PROPOSAL**

- ✓ Staff members with strong backgrounds and varied experience in public policy and government. All key FMM&A staff members assigned to this project have advanced degrees in public policy and/or extensive experience working in state or local government. As a result, FMM&A has a ready understanding of the challenges and tradeoffs that confront local government planners in a time of reduced revenues and increasing demand for services.

## PROJECT APPROACH

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Torrance is a socially and economically complex City. The sixth largest city in Los Angeles County, its approximately 147,000 residents include substantial groups of more recent immigrants, some of very modest means but others finding economic betterment, as well as neighborhoods peopled with residents with multiple generations in Torrance, some modestly comfortable and others extremely affluent.

Physically, the city is changing as well as growing. Parts of the City are experiencing renovation and redevelopment with new construction, preservation and gentrification moving at a rapid pace. Economically, change is occurring too as more service and advanced technology-related industries establish in Torrance and offer new economic opportunities. Hydro-carbon refining remains significant, as is the automotive management and headquarters business. The Del Almo Fashion Center continues to adapt to the times to maintain its position as the second largest shopping center in the United States. But growth strains existing infrastructure, affects the local environment and creates new service demands.

All of these social and economic trends are dynamic and raise questions about future directions and the strategies for sustaining and enhancing the local quality of life. They also increase demands for services from Torrance City government.

In this context, it is important to find out how satisfied the public and local business may be with the services rendered by the City of Torrance, what new directions are desired and what the response would be to initiatives that might be incorporated in a Strategic Plan update.

FMM&A proposes to provide custom-designed opinion research that would be tailored to meet the specific needs of the City. FMM&A does not believe in the use of a “cookie-cutter” questionnaire for every community. Instead, we would work closely with City staff and elected officials to develop a detailed understanding of research issues and needs, and then develop questionnaires for the two target populations – residents and local businesses -- that address issues carefully and thoroughly.

Our approach to community and business satisfaction surveys has been developed over several years; it includes the following methodologies to effectively gauge satisfaction with local services and maximize the value of the results:

- ✓ FMM&A would seek to examine the relationship between the importance the public places on individual City-provided services and the public's satisfaction with their delivery. This was one of the fundamental methods employed in the 1995 survey FMM&A completed for the City of Torrance. By asking about importance as well as satisfaction, FMM&A will be able to develop an importance/satisfaction matrix that identifies services that residents consider well-delivered but of lesser importance at one extreme, and higher importance but less well-delivered at the other. Because the perceptions of importance and satisfaction are measured on quantitative scales, the degree of importance/satisfaction for service functions can be characterized on a curve and sorted into to high/high, high/low, low/high and low/low quadrants. The importance/satisfaction matrix allows the City staff to comparatively examine particular City-provided services with respect to other City-provided services and identify possibilities and needs for the potential readjustment or reallocation of resources. (See **Appendix D** for a recent illustration of the Importance/Satisfaction Ratings Matrix Methodology).
- ✓ FMM&A would seek to establish benchmarks that could help inform strategic planning and performance measurement programs. For example, the City of San José has used FMM&A survey results to benchmark its "Investing in Results" performance measurement programs. To the extent that Torrance has a similar performance measurement program, FMM&A can define benchmarks to facilitate use of the survey as part of a strategic planning process.
- ✓ Where appropriate, FMM&A proposes to use Microsoft MapPoint mapping software to help analyze resident's views of development/redevelopment projects, City recreational facilities, environmentally sensitive areas and similar physical features based on respondent proximity. This mapping software provides a unique pictorial examination of the distribution of attitudes according to physical proximity to a specific physical feature.

The remainder of this section summarizes the key aspects of the process FMM&A proposes to follow in conducting the resident satisfaction and business surveys for the City of Torrance.

**Residential Questionnaire Design:** FMM&A proposes that the resident satisfaction survey be written so that English-speaking respondents would take 20 minutes on average in a telephone interview to respond to the survey's questions. A 20-minute survey would allow for 60 to 75 discrete items to be included in the questionnaire. The questionnaire would be written for all residents at least age 18, whether registered to vote or not, understanding that registered voters can be identified in the subsequent analysis of the Survey's results. Although FMM&A recommends a 20-minute length, a questionnaire of shorter or longer average length can also be developed if budgetary considerations require or permit.

The questionnaire design process will begin with an initial kickoff meeting between FMM&A and representatives of the City of Torrance. This meeting will be an in-depth, comprehensive discussion of the major issues that should be explored in the research. Following this meeting and review of any documentation provided by the City staff, FMM&A will write an initial survey questionnaire draft, which would then be presented to the City Staff for review and comment. After collecting feedback, FMM&A will revise and refine the survey questionnaire. This iterative process will continue until the City staff and FMM&A agree on a draft that meets substantive and technical requirements, as well conforms to the residential satisfaction survey's approved budget. FMM&A understands that this process may also involve discussion with elected officials or their staff.

The final content of the questionnaire will be developed in careful collaboration with the City staff, but FMM&A understands that the questionnaire would address the City's success in addressing and/or achieving identified strategic priorities, goals and sub-goals of the existing Strategic Plan, as well as indicate future trends and issues. The questionnaire might also probe in greater depth the perceptions of importance and satisfaction regarding services and outcomes of specific City programs by planning area or other geographic zones within Torrance. This can be achieved through development of area-specific question batteries. In addition to rating the importance of given services and the degree of satisfaction with their delivery, other lines of inquiry might include:

- Ascertainment of problems and issues residents would like to have City government resolve through the application of City resources;
- Ascertainment of opinions whether adequate resources are being provided to different services and whether more or less funding might be desirable;
- Ascertainment of opinions regarding supplemental funding sources.

The survey questionnaire will be translated into Spanish by Kandi Reyes of Reyes & Associates. Ms. Reyes, a native Spanish speaker, has translated questionnaires for FMM&A since 1990 under the editorial supervision of Project Leader, Dr. Richard Maullin, who is also fluent in Spanish.

FMM&A will have the questionnaire translated into Japanese by Worldbridge Language Services, located in West Los Angeles. Worldbridge has provided FMM&A with translation services in Asian languages since 2000.

**Survey Sample:** FMM&A proposes to conduct the 20 minute survey using a Random-Digit-Dial (RDD) sample of 500 respondents, 18 years and older, in the City of Torrance. RDD sampling select blocks of listed and unlisted residential telephone numbers in a jurisdiction in a completely random fashion, thus assuring that the results are valid for the entire population universe within the margin of error for the sample size. A 500 respondent sample has an error margin – the variation that might be caused by pure chance – of plus or minus 4.4 percent at the 95 percent confidence level.

In addition to providing a relatively small overall margin of error, the 500 respondent sample will also allow for sufficiently large sub-samples of different demographic, attitudinal and geographic groupings to provide a reasonably high level of confidence in these sub-group results, as well. The 1995 community satisfaction survey had a sample of 463 respondents.

The U.S. Census estimates that about 13 percent of the Torrance population is Latino. Assuming 60 percent are 18 years old or more, the net Latino adult population is about eight percent of the total adult population. Thus, FMM&A estimates that the 500-respondent sample will contain approximately 40 Latinos. Of this number, based on FMM&A experience in other Latino survey venues, about a quarter to a third (10 to 13) will want to complete the survey interview in Spanish.

Year 2000 Census estimates for the Japanese and Japanese-American population segments indicate that about 10 percent of the total Torrance population is composed of these two groups. The Census also indicates that the adult proportion of these groups is nearly 80 percent, which amounts to 40 of the 500 total residential survey respondents. Since there are no known estimates for the incidence of Japanese language use in a Torrance opinion survey, for estimating purposes, FMM&A assumes that between ten to thirty percent of the Japanese/Japanese-American adult population would prefer to respond to this residential survey in Japanese. Thus, there would be between four and 12 Japanese language interviews.

**Interviewing:** FMM&A has well-established procedures to supervise the interviewing process and to verify that interviews were conducted according to specifications. Among these procedures are the monitoring of actual interviews by on-site supervisors, identification of each interview by interviewer, and the use of a regularly-employed staff of professional, full time interviewers. There is an established protocol for callbacks of busy or "not-at-home" numbers designed specifically to maintain the randomness of interviewee selection and for hand-offs of Spanish and Japanese language interviews to bilingual interviewers. FMM&A retains all interviews as part of its data processing procedures described below.

The interviews would be conducted by McGuire Research Services (MRS), one of FMM&A's pre-qualified interviewing contractors, from its Las Vegas, Nevada call center. MRS has provided interviewing services to FMM&A since the mid-1980s, having completed literally thousands of surveys for FMM&A. MRS has Spanish/English and Japanese/English bilingual interviewers on its staff who are adept at conducting Spanish and Japanese language interviews and moving smoothly between languages as interviews requires.

FMM&A proposes to conduct a pre-test of the survey to assure that the estimated timing is within the parameters of the residential satisfaction survey budget and that the questions are well understood and flow easily for respondents.

**Data Analysis:** The survey's response data will be analyzed by FMM&A's Data Processing and Analysis Department staff using Survey System software, a well-

documented and widely-used data analysis software package, to report the tabulation and cross-tabulation of data. As needed, FMM&A may augment Survey System with SAS, another widely used social science data analysis program often used for more advanced statistical analysis. FMM&A has SAS-certified statisticians on its staff. FMM&A's Data Processing and Analysis Department employs a data checking and editing system to eliminate errors and document the handling of data received from the interviewers.

The morning after interviewing has been completed, FMM&A will e-mail "topline" results of the survey to the City staff. These results will present the overall percentage of respondents that chose each answer to each of the survey's questions.

Shortly thereafter, FMM&A will provide the City staff with a comprehensive set of cross-tabulated results. The cross-tabulated results will include a table for each question or demographic variable in the survey, with a series of up to 200 columns indicating how various subgroups of the population responded to that question. The cross-tabulated results will make it possible to detect differences in responses to each survey question among different subsets of the population.

In addition, FMM&A will analyze the survey's results using more advanced statistical methods, including regression analysis, to establish the extent of correlation between designated dependent variables and independent variables such as demographic findings.

Finally, FMM&A's data processing software package can convert the raw electronic data to ASCII format, an Excel spreadsheet or virtually any other format commonly used, so that the actual results of the survey can be transmitted electronically to the City at the conclusion of the study.

**Reports and Presentations:** Survey results will be presented both in-person and in writing according to the timeline and needs of the City. The written report and in-person presentations will also present key data in PowerPoint tables and graphs. After a draft report has been reviewed and commented upon by the City Staff, FMM&A will make any necessary edits and submit its final report.

We believe that the depth and quality of our written and PowerPoint reports of survey results set our firm apart from our competitors. To complete its reporting, FMM&A will provide the following:

- ✓ An executive summary presenting the key findings of the research, as well as resulting recommendations;
- ✓ Detailed analysis and interpretation of the survey results;
- ✓ Evaluation of significant differences between demographic, geographic, and attitudinal subgroups of survey respondents.

After the report and presentations have been completed, FMM&A staff will remain available to answer follow-up questions from the City.

**Deliverables:** In summary, upon conclusion of the residential satisfaction survey, the City of Torrance will have received the documents listed below from FMM&A. All documents will be provided in hard-copy and in an electronic form as the RFP requests.

- ✓ **Topline survey results** (the survey questionnaire filled in with the percentages choosing each response code)
- ✓ **Full cross-tabulated results** (responses to every question in the survey, broken down by dozens of demographic, geographic, and attitudinal subgroups)
- ✓ **Comprehensive written report of results** (a written summary and analysis of the surveys – including tables and graphs – with detailed recommendations I desired by the City)
- ✓ **PowerPoint presentation of key findings** (color slides highlighting important results from the survey)
- ✓ **Raw data from all surveys in electronic form** (delivered in a file format chosen by the City)

**Local Business Questionnaire Design:** FMM&A proposes that the survey of local businesses, like the residential survey, be written so that English-speaking respondents would take 20 minutes on average in a telephone interview to respond to the survey's questions. Thus the business survey would also allow for 60 to 75 discrete items to be included in the questionnaire. Although FMM&A recommends a 20-minute length, a questionnaire of shorter or longer average length can also be developed if budgetary considerations require or permit.

**Survey Sample:** FMM&A proposes to conduct 300 interviews among respondents drawn at random from a City-provided list of business licensees. Although the RFP calls for use of a Random-Digit-Dial (RDD) sample, the use of the City-provided business license list is much more cost and time efficient, as well as utilizing a proven sampling methodology for this type of survey. FMM&A would randomize the business license list so that all licensees have an equal opportunity of being called. The margin of error for the 300-respondent sample is plus or minus 5.6 percent at the 95 percent confidence level.

**Interviewing:** FMM&A would conduct interviewing in the same manner as the residential survey except that the majority of calls would be made directly to local businesses during workday hours. FMM&A's experience is that many of the interviews will be scheduled on the first call to a convenient time for the business respondent. The same procedures for managing and supervising the interviewing process outlined in the residential survey section would also apply to the business survey.

The interviews would be conducted by McGuire Research Services (MRS), the same sub-contractor that would conduct the residential survey. All interviews would be in English. FMM&A proposes to conduct a pre-test of the survey.

**Data Analysis:** The data analysis of the business survey's response data will be identical to the residential survey.

As with the residential survey, the morning after interviewing has been completed, FMM&A will e-mail "topline" results of the business survey to the City staff. These results will present the overall percentage of respondents that chose each answer to each of the survey's questions. Shortly thereafter, FMM&A will provide the City staff with a comprehensive set of cross-tabulated results.

In addition, FMM&A will analyze the survey's results using more advanced statistical methods, including regression analysis, to establish the extent of correlation between designated dependent variables and independent variables such as demographic findings.

Finally, FMM&A's data processing software package can convert the raw electronic data to ASCII format, an Excel spreadsheet or virtually any other format commonly used, so that the actual results of the survey can be transmitted electronically to the City at the conclusion of the study.

**Reports and Presentations:** Business survey results, like the residential survey responses, will be presented both in-person and in writing according to the timeline and needs of the City.

To complete its reporting of the business survey, FMM&A will provide the following:

- ✓ An executive summary presenting the key findings of the research, as well as resulting recommendations;
- ✓ Detailed analysis and interpretation of the survey results;
- ✓ Evaluation of significant differences between demographic, geographic, and attitudinal subgroups of survey respondents.

After the report and presentations have been completed, FMM&A staff will remain available to answer follow-up questions from the City.

**Deliverables:** In summary, upon conclusion of the business survey, the City of Torrance will have received the documents listed below from FMM&A. All documents will be provided in hard-copy and in an electronic form as the RFP requests.

- ✓ **Topline survey results** (the survey questionnaire filled in with the percentages choosing each response code)
- ✓ **Full cross-tabulated results** (responses to every question in the survey, broken down by dozens of demographic, geographic, and attitudinal subgroups)
- ✓ **Comprehensive written report of results** (a written summary and analysis of the surveys – including tables and graphs – with detailed recommendations I desired by the City)
- ✓ **PowerPoint presentation of key findings** (color slides highlighting important results from the survey)
- ✓ **Raw data from all surveys in electronic form** (delivered in a file format chosen by the City)

#### BUDGET, TIMELINE AND ALLOCATION OF PROFESSIONAL TIME

**Research Costs:** FMM&A's recommendation is to conduct two 20-minute surveys, one for City residents and another for City business licensees. Since both surveys are closely related in objectives and background information, FMM&A is treating the opinion research work as a single project with two elements (the respective residential and business surveys.) This allows for economies in organizing the work and estimating the costs. (For example, there need be a single kick-off meeting and briefing for both surveys.) All costs listed are comprehensive, and include all costs for design of the questionnaires, sample acquisition and preparation, telephone interviewing, translation into Spanish and Japanese, data analysis and cross-tabulation, and presentation of the surveys' results to City staff. Because of the proximity of FMM&A's Santa Monica office to Torrance, FMM&A will not charge for travel.

#### SURVEY COST ESTIMATE

Sample size/average length	All-inclusive cost estimate	Margin of error
Residential 500/20 minutes; Business 300/20 minutes	<b>\$45,930</b> (direct costs, fully burdened: <b>\$25,833</b> ) (labor costs, fully burdened: <b>\$20,097</b> )	For the residential survey, +/- 4.4%; for the business survey, +/- 5.6%

**Project Timeline.** FMM&A is ready to begin work on the Torrance residential and business surveys at the City's request. FMM&A can complete and report the surveys within a seven to eight week timeframe. A summary of the project milestones follows below. FMM&A can shorten or lengthen the timetable at the City's request.

***Week one and two***

- Authorization to proceed; kick-off meeting
- Review and modify scope of work
- Finalize sample specifications and acquire the survey sample for both surveys
- Develop questions for both surveys

***Week two and three***

- Circulate survey drafts for comment

***Week three and four***

- Finalize survey drafts
- Pre-test surveys
- Make translations

***Week four and five***

- Conduct surveys

***Week five***

- Produce topline results for both surveys
- Produce survey cross-tabulation reports
- Conduct advanced statistical analyses

***Week six***

- Prepare preliminary reports of findings and recommendations
- Present draft report for review by Torrance staff

***Week seven-eight***

- Receive City comments
- Produce final reports
- Present survey findings and recommendations

**Allocation of professional time** FMM&A contemplates dedicating 70 hours of professional time to this project for the researchers whose resumes are included in Appendix A. The allocations of these hours will be as follows:

Richard Maullin: 15 hours

Richard Bernard: 35 hours

Jonathan Brown: 20 hours