



GODBE RESEARCH
Gain Insight

SCOPE OF WORK 2017 COMMUNITY SURVEY

Presented to the City of Cupertino

November 8, 2016

SCOPE OF WORK

Godbe Research is a recognized leader in public opinion research and voter polling for California local government agencies. Our firm believes that the success of any research study depends on recognizing the individual and unique needs of each of our clients, and then crafting a project work plan to meet those specific needs. To this end, Godbe Research has developed the following scope of work for the City of Cupertino (Cupertino or City) to illustrate the types of considerations that go into each of our research projects. This work plan is designed to become an exhibit or attachment to the City's standard professional services agreement for the 2017 Community Survey.

Research Objectives

Before beginning any research project, Godbe Research spends significant time reviewing each client's research objectives to choose the most appropriate research design. Based on our understanding of the project from information provided by the City as well as our experience with previous Community Surveys for Cupertino, Godbe Research understands that City has several research objectives to be addressed by this current study. These will likely include:

- ✓ evaluating overall resident perceptions of living in the City of Cupertino;
- ✓ gauging resident satisfaction with the City's performance in providing services and programs;
- ✓ gathering resident feedback on several local issues, including: parks and recreation; transportation choices; sustainability; economic development and housing; crime; ethnic diversity; information sources; and potentially other issues;
- ✓ identifying any differences in attitudes and behaviors due to demographic and/or behavioral characteristics, *and*;
- ✓ other research objectives to be refined between Godbe Research and the City of Cupertino as part of the 2017 Community Survey.

Methodology and Sample Discussion

Given the fact that telephone surveys (even ones including cell phones) are seeing a large decline in response rates by age and given our experience with this phenomenon with municipal clients throughout Santa Clara County, it is our recommendation to transition to a hybrid Internet and telephone survey of voters for the 2017 Community Survey for the City of Cupertino. Godbe Research has pioneered this process for numerous clients over the past few years to acknowledge and counteract declining response rates for telephone surveys among certain demographic subgroups (mostly age related) as well as to leverage technologies that are preferred among various demographic subgroups. Some of our clients who have used a successful similar hybrid methodology for their resident satisfaction, community priorities, and other public policy surveys include the City of Campbell, Town of Los Gatos, City of Morgan Hill, City of Saratoga, Town of Los Altos Hills, City of Menlo Park, City of Redwood City, City of San Mateo, and more than two dozen others.

Based on our recommendation, we are planning to conduct a hybrid quantitative survey using an Internet survey as our primary data collection method. We will then supplement the Internet survey with a telephone survey methodology, after a review of Internet survey respondent demographics where we can identify and account for potential demographic sub-groups that might not respond adequately to the Internet version of the

survey. The primary sampling source for the survey will come directly from the State voter file, where we have self-reported phone numbers (cell phones and landlines) as well as email addresses for known Cupertino residents. Using the City of Redwood City as a recent example (Resident Satisfaction Surveys in 2015 - hybrid, and 2012, 2010 & 2008 – telephone phone only), the Internet modality portion of the overall survey project was able to collect a wealth of data from the 18 to 49 year old resident subgroup but was very inefficient in collecting data from residents age 49+. Similarly, while the telephone modality portion of the project was an excellent method to ‘round out’ our demographic and geographic quotas for 18 to 49 year old residents, the telephone version collected the vast majority of interviews with residents age 49+; however, it would have been woefully insufficient as a primary data collection methodology for the hard to reach 18 to 49 year old resident group.

Our recommended hybrid methodological approach will cost effectively allow us to collect data from Cupertino residents/voters based on how potential respondents prefer to interact with various survey technologies in order to maximize our sample size and statistical validity for the survey, as well as allow for better demographic and geographic representation by providing a choice of modality to potential respondents. In addition, for the telephone modality portion of the overall survey, we will also make sure to include ‘cell phone only’ residents, given that we can identify cell phone exchanges within the voter file sample by matching telephone prefix to known and unique cell phone prefixes. Finally, in using our recommended hybrid methodology it is also possible to leverage City provided lists (e.g. communications, parks and recreation services lists, public works lists, etc.) to increase the number of voters for which we have emails or to cost effectively include City of Cupertino residents who are not registered to vote in our sampling design.

Scope of Work

To accomplish the research objectives of the City of Cupertino for the 2017 Community Survey, and based on our recommended hybrid Internet and telephone survey process, Godbe Research has provided our proposed scope of work below. Accordingly, specific tasks for the 2017 Community Survey are thus envisioned to include:

- Conducting an in-person kick-off meeting with the Cupertino project team, as well as additional meetings and conference calls to discuss the research objectives, questionnaire design, sampling design, and other facets of the overall project in detail.
- Designing and refining a survey instrument of approximately 18 to 22-minutes in length so that it addresses the research objectives of the City of Cupertino for the 2017 Community Survey.
 - ❖ For reference, the 2014 and 2012 Community Surveys were 22-minutes in length, however, with each Community Survey event; we have had a range of event or time-based topics, which could affect the survey length for 2017.
 - ❖ The survey will be designed to be formatted for both Internet and telephone survey modalities as a ‘hybrid survey’ and both versions of the survey will be identical save for instructions specific to each modality.
- Programming, refining, and testing the Internet version of the survey instrument using our Internet survey software package. This will be done by our partner team of IT and programming experts.

- CATI programming the telephone version of the survey instrument for efficient and accurate data collection, and training telephone interviewing personnel on the questionnaire and interviewing protocol.
 - ❖ For our telephone interviewing projects, Godbe Research uses only live interviewers, who have been intensively trained on the survey questionnaire, and who are located in the western United States.
- Pre-testing the survey instrument in both modalities to ensure that the questions and response codes are understandable to respondents, and to ensure that the survey length coincides with the budgeted survey length for the project.
- Developing a recruitment email for the Internet version of the survey and working with Cupertino so that Godbe Research can send recruitment emails to voters with known self-reported email addresses in the voter file.
- Development of a stratified and clustered listed sample of City of Cupertino registered voters for the 2017 Community Survey.
 - ❖ For reference, we have identified that there are a total of approximately 26,679 voters in the City of Cupertino for which we have email addresses for about 6,154 voters or 23% of the total voting electorate in the City. The used of a listed voter sample also allows us to analyze data by the registered voter population as well as to weight the data to see results by the larger adult resident (18+) population in the City.
 - ❖ Finally, as stated earlier, it is also possible to match any City email lists to the voter file to increase the number of voters with email addresses in our sampling frame or to include adult residents who are not registered to vote, so long as we have first name, last name, email address, and ideally physical address for matching purposes. Any contact information provided by the City will remain strictly confidential and will not be used on our analysis and reporting after the survey has been completed.
- Optionally translating the telephone version of the survey into Mandarin so that monolingual Mandarin speaking residents can take the survey in their native language, or so bilingual residents can take the survey in the language in which they are most comfortable.
 - ❖ The optional translation and interviewing costs for Mandarin provided later in this document are valid for up to 10% of telephone interviews.
- Conducting approximate 18 to 22-minute Internet and telephone interviews with 400 (n=400) total registered voters according to a strict interviewing protocol and our recommended sampling design of registered voters. A sample size of 400 would provide for a margin of error of no greater than +/-5% at the 95% confidence level, when looking at all registered voters or all residents in the City of Cupertino.
 - ❖ For reference, the 2014 Community Survey (most recent Community Survey) had an overall sample size of just over 400 (403) respondents.
 - ❖ In addition, based on other municipal clients in Santa Clara and San Mateo Counties, and the number of email addresses in the voter file, we would expect to conduct 40% to 50% of all interviews via the Internet

with the remaining 50% to 60% of interviews coming via the telephone (landline or cell phone).

- Merging the Internet and telephone data files, as well as processing and weighting the data to adjust for population distribution and strategic oversampling, as needed.
 - ❖ This includes weighting the data to the larger adult resident population in the City based on the 2010 Census, ACS Projections, or other data source consistent with previous Community Surveys conducted for the City.
- Analyzing the survey data and preparing a report of results and findings for Cupertino which directly addresses the research objectives outlined for the 2017 Community Survey, as well as comparing applicable data to previous Community Surveys conducted for the City.
 - ❖ The report, in PowerPoint format, will include an overview and discussion of the research objectives, methodology discussion, key findings section, overview of City services and review of specific City services, executive summary, demographics section, and a complete set of crosstabulations for all questions asked in the survey.
- Presenting the results to Cupertino staff and administration, and the Cupertino City Council for up to two total project presentations.
- Post-project consulting with Cupertino regarding the results and recommendations from the 2017 Community Survey, as needed (no charge to the City).



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