

## REQUEST FOR PROPOSALS

The Town of Natick, Massachusetts, is soliciting proposals from qualified marketing research firms for a scientifically and statistically valid representative sample survey of Natick adult residents.

### General Information

All interested parties must submit a proposal in accordance with the requirements of this RFP. The proposal submitted shall consist of one set of unbound original documents containing an original authorizing signature and two copies of the same documents which shall be bound. Proposals shall be submitted no later than **1:00 p.m. EDT, Thursday, May 3rd, 2007**. Proposals submitted after the deadline shall be returned unopened. Proposals must be submitted prior to the deadline for consideration. Proposers are responsible for ensuring timely receipt, regardless of postmark or delivery service. Please submit one signed original and two copies in hard copy form. Submission via fax or email will NOT be accepted. Submission must be made to:

Mr. Chris Bradley  
Procurement Officer  
Natick Town Hall  
13 East Central Street  
Natick, MA 01760

Tel. (508) 647-6400 ext. 1436

This RFP can be obtained at the Town of Natick Procurement Office, 13 East Central Street, Natick, MA 01760 on or after Wednesday, April 4, 2007.

The Town reserves the right to reject any or all proposals, in whole or in part. The Town reserves the right to request information to clarify proposals. This RFP is a competitive procurement process which helps to serve the best interests of the Town. Price will be only one of the factors for determination of award, taking into consideration the evaluation criteria set forth herein.

Questions or clarifications concerning this RFP process must be submitted in writing on or before April 13, 2007 at 4:00 p.m. EDT. Questions may be submitted by email to:

Mr. Chris Bradley  
Procurement Officer  
[cbradley@natickma.org](mailto:cbradley@natickma.org)

Telephone questions will not be accepted. All questions and answers will be released to all parties who register a request for a copy of this RFP. To register a request for a copy of this RFP, please call Mr. Bradley at (508) 647-6400 ext. 1436, or email to [cbradley@natickma.org](mailto:cbradley@natickma.org). In either case, provide complete contact information, including contact name, firm name, mailing address, telephone number and email address.

## Bidder Instructions

### Schedule

*This schedule outlines the major activities that will occur in this bid process and the due dates. Any changes in deadlines will be communicated to all registered firms and individuals in writing.*

*Extension of the deadline is at the discretion of the Town.*

Activity	Description	Due Date
Submit questions	Questions must be submitted in writing to Christopher Bradley e-mail: <a href="mailto:cbradley@natickma.org">cbradley@natickma.org</a>	April 13, 2007, 4:00 p.m.
Respond to questions	Answers will be submitted in writing to all registered vendors if required.	April 19, 2007
Submit proposal response	See General Submission Instructions	May 3, 2007, 1:00 p.m.

### General Submission Instructions

Sealed proposals shall be submitted no later than Thursday, May 3, 2007 at 1:00 p.m. to the Procurement Office, Natick Town Hall, 13 East Central Street, Natick, MA 01760, at which time the proposals will be opened in the presence of one or more witnesses and registered in accordance with Massachusetts General Law Chapter 30B, Section 6 (d). Proposals shall not be publicly opened.

**Each proposer shall submit one original and nine (9) copies of the Non-price Proposal, which shall be signed by an authorized representative of the proposer. Each envelop shall be marked with the proposer’s name, the date of opening, the words “Non-price Proposal – Natick Survey Proposal.”**

**Each proposer shall also submit one original Price Proposal, separate from the “Non-price Proposal” which shall be signed by an authorized representative of the proposer. The envelope shall be marked with the proposer’s name, the date of opening, the words “Price Proposal - Natick Survey Proposal”.**

The Town reserves the right to reject any or all proposals and to waive any informality in a proposal if it determines such action to be in the best interest of the Town. **Any proposals failing to separate the Price Proposal from the Non-price Proposal shall not be considered.** A contract shall be awarded to the most advantageous, responsible and responsive proposer, taking into consideration price and the evaluation criteria set forth herein. The Contract will be awarded within sixty (60) days of opening of proposals. An extension of time for award shall be mutually agreed upon if required.

Each **Non-price Proposal** shall contain:

- Narrative description of proposing entity

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- List of key personnel (Principal Investigator and Project Manager) with resume or cv
- List of all references for the last five years
- **Tax Certification\***
- **Non-collusion Certification\***

**\* If Non-price Proposal does not include the Tax and Collusion document that proposal shall be considered non-responsive and shall not be considered.**

If sent by mail, allowance should be made for the time required for such transmission. Proposals received after the deadline will **not** be considered.

The Town of Natick is soliciting services through the Request For Proposals (RFP) process in accordance with Massachusetts General Law (MGL) Chapter 30B from qualified, experienced and professional entities to provide services as detailed herein. The submission of a response in no way obligates the Town.

The Town reserves the right to reject any or all proposals, in whole or in part. Interviews will be required of the top three ranked entities. The Town reserves the right to request information to clarify proposals. This RFP is a competitive procurement process which helps to serve the best interests of the Town. Price will be only one of the factors for determination of award, taking into consideration the evaluation criteria set forth herein.

***RFP Addenda***

In the event that modifications or additions to the RFP become necessary, vendors will be notified in writing.

***Proposal Preparation Costs***

The supplier will absorb all costs incurred in the preparation and presentation of the proposal.

***Supporting Documentation***

All documentation submitted with the proposal will become the property of the Town.

***Contact***

Communications and all questions regarding this bid shall be sent to:

**Christopher Bradley, Procurement Officer  
Town of Natick  
13 East Central Street  
Natick, MA 01760**

## **Purpose and Scope of Work**

The overall purpose of this survey is to augment the attitudinal input received throughout the public strategic planning process, including attitudes toward strategic initiatives and willingness to pay for them, that will be gathered in a series of public participation workshops to be held June 8-10, 2007. More specific objectives for questionnaire development will be available after these workshops. The project will include:

1. Survey design,
2. Sample selection,
3. Development of survey instrument,
4. Testing of survey instrument,
5. Administration of survey instrument,
6. Data processing,
7. Analysis of survey results, and
8. Reporting of survey results.

The base population to be studied is the adult (18 years old and older) citizens residing within the boundaries of the Town of Natick. According to Census 2000, the Town's adult population was 24,523, of 31,868 total. In addition to surveying this base population, but as secondary priorities, the Town of Natick is interested in being able to cross-tabulate questionnaire data for subpopulations in the following order of descending priority:

1. Four age groups (18-34, 35-44, 45-64, or 65+);
2. Four employment status groups (student, employed, non-working, or retired);
3. Two family structures (children under 18 living at home, or no children under 18 living at home); and
4. Four annual household income groups (less than \$35,000, \$35,000 to , \$74,999, \$75,000 to , \$149,999, or \$150,000 or more).

The Town will provide a list of participants in the public workshops June 8-10. All of these individuals (except any that may be selected for the random sample) should be surveyed using an identical survey instrument, but their responses should be tabulated separately from the random sample, and their responses compared to the responses of the random sample.

Summaries of Census 2000 population by age group and households by 1999 income are in Appendix B.

## Background

The Town of Natick is undergoing a Town-wide strategic planning process called *Natick 360*, a 15-months-long process resulting in a five-year strategic plan (2008-2012) for the Town of Natick that is accepted by the five sponsoring boards and committees, and by Town Meeting<sup>1</sup> in October, 2007. The *Natick 360* process is sponsored by five autonomous volunteer boards and committees: Board of Selectmen; Conservation Commission; Finance Committee; Planning Board; School Committee. The process is overseen by the Strategic Planning Oversight Committee (SPOC)<sup>2</sup>. A contracted strategic planning consulting firm manages and facilitates the *Natick 360* process.

The *Natick 360* process includes four primary phases:

1. *Our Community Yesterday and Today* resulted in a research report, by the Metropolitan Area Planning Council, that describes Natick's history and current (baseline) conditions.
2. *Our Shared Vision for the Future* focused developing a set of shared values and visions for the Natick community. The cornerstone of the visioning process was the "Vision for the Future Weekend" in October 2006, when 327 members of the public met in facilitated workshops to discuss community values and hopes for the future. This information, together with information from focus groups, on-going volunteer surveys, community meetings and meeting with the sponsoring boards and committees, resulted in a Values and Vision report that was unanimously accepted by the sponsoring boards and committees.
3. *Our Strategic Options* will focus on solutions to areas where Natick falls short of its vision. The sponsoring boards and committees are working to develop strategic options: different strategies for establishing policies, programs or projects that could be implemented to meet focus area goals. Each strategy (and its component policies, programs and projects) will include cost information, including the associated marginal annual tax burden for the average household. The process also has included meetings with members of the public and with key informants that included officials from neighboring towns, state government, not-for-profit advocacy groups, academia and others. The sponsoring boards and committees will consider accepting the *Strategic Options* report late April and early May 2007.
4. *Our Strategic Choices* will result in a proposed *Natick 360 Strategic Plan* that will be considered for acceptance by the sponsoring boards and committees in September, 2007, and then by Town Meeting in October. It includes two primary activities: (a) a series of public participation workshops June 8-10 when members of the public will select which strategic options they would like to fund and see implemented, and (b) a scientific sample survey of the general population to identify which strategic options the general population would like to fund and see implemented.

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<sup>1</sup> Natick uses a "representative town meeting" form of government. Twelve Town Meeting representatives are elected from each of 10 geographical precincts, and a Moderator is elected at-large. Regular Town Meetings occur in October and April each year; special Town Meetings may occur at any time.

<sup>2</sup> The Strategic Planning Oversight Committee (SPOC) is a group of nine volunteer Natick citizens responsible for overseeing the strategic planning process. Its charge is process management only; it does not address content. Five members are designated by the five sponsoring Boards and Committees, and four members, selected by these designees, serve in at-large positions

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Additional information about the Town's strategic planning process is available at [www.natick360.org](http://www.natick360.org). Appendix C contains a chart describing the overall process.

At the second public participation workshops on June 8-10, volunteer participants will provide input on a number of strategies (goal-based strategic-level decision packages) made up of policies, programs and projects, with associated per-household cost (tax) impact information. The strategies are grouped into focus areas. A preliminary draft—subject to change—of the eight focus areas, in no particular order, is attached to this RFP as Appendix A. At the workshops, participants working in small groups will be asked to identify selected strategies they believe should be implemented, based on both benefits and cost impacts, and then assign to the selected strategies a high, medium or low priority rating. Because of this process, the number of strategic choices is expected to be narrowed significantly from the list in Appendix A, to include perhaps 20 to 30 decision items.

Participants in the workshops are self-selected, so the consensus decisions reached at the workshops may not reflect the attitudes of the Town's citizenry as a whole. The purpose of the survey is to augment the information obtained throughout the entire process with opinions from a representative sample of the adult population. The results of the June 8-10 workshops will impact the specific objectives of the survey. The survey, together with the other sources of information, are intended to provide the sponsoring Boards and Committees with the confidence to move in certain strategic directions supported by the community.

### **Required Components of Proposal**

Proposals must include all of the following:

1. **Qualifications of the firm:** Describe the background and experience of the proposing firm in conducting opinion research, and how long the firm has been in the opinion research business.
2. **Specific Firm Experience:** Provide information on the specific experience of the firm in conducting studies dealing with measuring public attitudes about local government issues, such as: strategic plans, economic development, increasing revenue, fiscal policy, municipal services, or public policies. Provide names and telephone numbers for at least three references who are directly knowledgeable about the firm's previous work in any of these relevant subject areas.
3. **Principal Investigator's Qualifications:** Provide detailed information on the education and experience of the principal investigator, who is ultimately responsible for the quality of the research product. This information should include a résumé detailing the principal investigator's:
  - a. Specific academic background and educational experience in survey research, and
  - b. Experience in conducting and overseeing similar survey research studies.
4. **Project Manager's Experience and Education:** If the proposed principal investigator is not also the project manager, provide detailed information on the qualifications of the project manager, who will directly manage the personnel and the timetable of the research project. This information should include a résumé detailing the project manager's:
  - a. Specific academic background and educational experience in survey research, and
  - b. Experience in conducting and managing similar survey research studies.

5. **A description of the research approach proposed:** In ten or fewer pages for this section, please specify what you propose to do in each of the following areas:
- a. *Research design:* Describe your process and procedures for designing survey research projects. Describe in general terms the structure of the questionnaire you propose to design for this project (for example: optimum survey length; types of answers envisioned, such as open- or closed-ended, multiple choice, agree/disagree, etc.). Describe how you expect to measure both the respondents' affinity for various strategic options and their willingness to pay for the strategic options that may be subjects of the questionnaire. Describe how you propose to test the questionnaire.
  - b. *Sample selection:* Describe how you will balance the goals of efficiency and comprehensiveness so that the sample selected is both economic and statistically defensible. Describe the source(s) you will use for the population universe, from which you will select the sample. Describe your sample selection methodology. Describe how you will ensure that the sample is representative of the subject population. Separately, describe which subpopulations (see Purpose and Scope of Work, above) will also be measured within the available budget, to cross-tabulate the data by subpopulations. Describe your overall proposed sample size for the survey, and discuss why that sample size is appropriate, in terms of anticipated and minimum response rates, precision and confidence.
  - c. *Field work:* Describe your proposed questionnaire administration methodology and your quality-control procedures. Describe your target response rate, and proposed strategies for achieving that target. If you anticipate using multiple media (such as mail, telephone or Internet), describe how you will ensure that duplicate responses are not tabulated for any respondent, and that responses are tabulated only for members of the sample. Describe how you plan to deal with respondents with special needs or language issues.
  - d. *Data processing:* Describe how data are processed, cleaned and presented. Describe your general privacy control and security procedures. Proposals may become public information; do not disclose information that might compromise your security procedures.
  - e. *Analysis and reporting:* Describe the nature of the work products you envision.
6. **Project Plan:** Describe the major steps in your proposed process, including a timetable. The following milestones are targets for the Natick 360 process. Please explain any proposed deviations from these milestones in your project plan:

April 4, 2007	Town of Natick issues RFP for survey research project
April 13	Bidders' questions due
April 19	Bidders' questions answers provided
May 3	Survey research project proposals due
May 4-16	Proposal evaluation and finalist interview period
May 21	Award survey firm contract by Board of Selectmen
June 8-10	Strategic Options Workshops weekend
June 26	Strategic Options Workshops results available
June 26-July 10	Survey instrument design
July 11-13	Survey instrument pre-test
July 13-30	Administer survey in the field
July 31-August 13	Survey data analysis and report preparation
August 8	Preliminary review of results by SPOC
August 14-16	Present final survey report to sponsoring boards and committees in three joint meetings

7. **Pricing:** Quote a firm, fixed price for this research. If there are any variable or additional costs, describe exactly what these are and how they are calculated. Quote a price for surveying the base population, and any additional price to survey additional subjects in order to be able to perform cross-tabulations of subpopulations (described under Purpose and Scope of Work, above). Total price, including both base population survey and additional price to perform cross-tabulations of subpopulations, should not exceed the Town's available budget (see below).

## **Deliverables**

Contractor will deliver each of the following products or services:

1. **Action plan:** Within one week after the contract is awarded, Contractor will submit to the Strategic Plan Project Manager a detailed project plan, showing each activity or milestone, the responsible individual, and start- and end-dates. The action plan will also show tasks assigned to the Strategic Plan Project Manager and any other Town representatives or employees.
2. **Survey questionnaire:** In late August, Contractor will draft a proposed survey questionnaire based on information provided by the Strategic Plan Project Manager. Contractor will work with a Subcommittee of the SPOC—and participate in a meeting with the entire SPOC—to review and discuss the proposed questionnaire. Contractor will prepare a final questionnaire based on feedback from these meetings.
3. **Report on results of questionnaire test:** Contractor's brief report will describe testing procedures, test results, and changes to the questionnaire based on the results.
4. **Final report documents:** All final report documents should be submitted both in one hard copy and in electronic form to facilitate reproduction.
  - a. Contractor will prepare and submit a brief final report that summarizes the survey procedures and results in an easy-to-read format that the public may readily comprehend. Use of color and clear graphics is encouraged.
  - b. Contractor will prepare and submit a PowerPoint presentation that summarizes the survey procedures and results, using easily-understood terms and graphics. Contractor should be prepared to use this presentation in presenting the draft report to the Strategic Planning Oversight Committee or its subcommittee. The final report to the Town may either be a separate report to the Town, or it may be incorporated into the overall draft strategic plan. The presentation should include a map showing the location of each survey respondent, to demonstrate that respondents reside throughout the Town.
  - c. Contractor will prepare and submit a technical report that documents the survey procedures and results in more rigorous and technical detail.

## Selection Criteria

### Substitution of Personnel

Information about all personnel who are contemplated to be applied to this project must be included in the proposal. The approximate involvement of all personnel should be clearly specified. The Strategic Planning Oversight Committee reserves the right to approve any substitution of personnel resources during the duration of this project.

### Scope of Proposals

Respondents are invited to submit proposals for the full scope of Phases 2-4 as outlined here only. Proposals for less than the total project will be considered non-responsive

### Award

The Committee shall make a recommendation of award by ranking the three most advantageous finalists. After the interview process is complete, the top-ranked finalist may be recommended to the Board of Selectmen as the Awarding Authority (AA) taking into consideration the pricing. The pricing will be opened after ranking the finalists and before the Committee's recommendation. Award of contract under this solicitation shall be made within 60 days of completion of the interviewing process.

The Town of Natick has budgeted up to \$\_\_\_\_,000 (\_\_\_\_\_ Thousand Dollars) for this survey research project. Proposals with a total price greater than this amount—including amounts to accommodate cross-tabulations of subpopulations—will be disqualified. A SPOC subcommittee may interview selected bidders before recommending a contract award. Award of the contract will be based on the maximum benefit to the Town of Natick rather than only on price or any other single criterion.

The Town reserves the right to reject any or all proposals, in whole or in part. The Town reserves the right to request information to clarify proposals. This RFP is a competitive procurement process which helps to serve the best interests of the Town. Price will be only one of the factors for determination of award, taking into consideration the evaluation criteria set forth herein: firm qualifications, principal investigator qualifications, project manager qualifications (if different from principal investigator), description of the research approach proposed, amount of cross-tabulation information to be provided, consistency of the project plan with the schedule dates noted, interview (if any), as well as price.

## Evaluation of Proposals

Each responsive applicant shall be evaluated on the following criteria for determination of the three most advantageous responses. The final three highest rated applicants shall be invited to make presentations to the Committee. Attached is the Evaluation Form to be completed for each company by the Committee. **Note: each criterion has been weighted with one half the weight apportioned to the Principal Investigator (30%) and the Project Manager (20%).**

**Project experience (25%):**

- HA Applicant has completed four or more public survey processes in the last three years (preferably including at least one Massachusetts municipality).
- A Applicant has completed one-to three survey processes in the last three years.
- DA Applicant has completed no survey processes in the last three years.

**Schedule (5%):**

- HA Applicant schedule exceeds requirements
- A Applicant schedule meets requirements
- DA Applicant schedule does not meet requirements

**Reporting Experience (20%)**

- HA Applicant has authored/edited four or more public survey reports (preferably related to strategic planning) in the last three years
- A Applicant has authored/edited one to three public reports (preferably related to strategic planning) in the last three years
- DA Applicant has not authored/edited any public reports in the last three years

**Principal Investigator (30%):**

- HA Manager has completed four or more public survey processes for public or private entities with at least \$100 million in revenues
- A Personnel have completed one to three public survey processes for public or private entities with at least \$100 million in revenues
- DA Personnel have completed no public processes for public or private entities with at least \$100 million in revenues

**Project Manager (20%):**

- HA Project Manager has managed four or more public survey processes in the last three years
- A Project Manager has managed one to three public survey processes in the last three years
- DA Facilitator has not managed a public survey process in the last three years

### EVALUATION FORM

Research Consultant		
Company Name : _____ Evaluator _____		
CRITERIA	RATING	COMMENTS
1. <b>Project experience (25%)</b>		
2. <b>Schedule (5%)</b>		
3. <b>Reporting Experience (20%)</b>		
4. <b>Principal Investigator (30%)</b>		
5. <b>Project Manager (20%)</b>		
<b>Composite rating</b>		

Each rating shall be delineated by the use of one of the following: Highly Advantageous (HA), Advantageous (A), Disadvantageous (DA) - to the categories identified on this evaluation form. If more writing space is required under "Comments" please note on this form the number of attached sheets. Numerical ratings are **not** to be used in this evaluation. The Composite rating shall be HA, A or DA (No other rating format is acceptable).



## Non-Collusion and Tax Compliance Certification

The undersigned certifies under penalties of perjury that this bid has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals.

Pursuant to M.G.L. c. 62C, Section 49A, the undersigned hereby certifies under pains and penalties of perjury that \_\_\_\_\_ has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
Signature of authorized individual

\_\_\_\_\_  
Name of Business

\_\_\_\_\_  
Federal Tax Identification Number

\_\_\_\_\_  
Date

**Note : This must be submitted in the sealed envelope clearly marked " Non-Price Portion" of proposal.**

## **Other Terms and Conditions**

Information regarding this survey project, including the final report will become the property of the Town of Natick. This project is “work for hire,” and the Town of Natick will retain the copyrights for all reports, including the final report documents.

Contractor will not release any information regarding this project to the public or to the press without the prior written consent of the Town Administrator.

The selected contractor will be required to execute the Town’s standard professional services agreement, in the form prepared by the Town Attorney. A standard form of this agreement is attached as Appendix D.

## **Appendix A. Focus Areas**

(Preliminary Draft; Subject to Revision)

- Increasing civic engagement and leadership
- Improving public education
- Improving the Natick environment and the health of the population
- Enlivening Natick center
- Balancing town financial resources
- Improving the town's infrastructure and transportation options
- Planning for change and managing growth
- Leveraging regional resources

## Appendix B. Population and Income Summaries

(Source: Census 2000<sup>3</sup>)

### Population by Age Group<sup>4</sup>

Age Group	2000 Census Population	Percent
< 18	7,345	23%
18 - 34	6,544	21%
35 - 44	6,003	19%
45 - 64	7,398	23%
65 +	4,578	14%
Adults	24,523	77%
Total Population	31,868	100%

### Households by Income Group<sup>5</sup>

Income Group	1999 Household Income	Percent
<\$35,000	2,859	22%
\$35,000 - <\$75,000	4,124	32%
\$75,000 - <\$150,000	4,397	34%
\$150,000 +	1,577	12%
Total Households	12,957	100%
Median Income	\$69,832	---

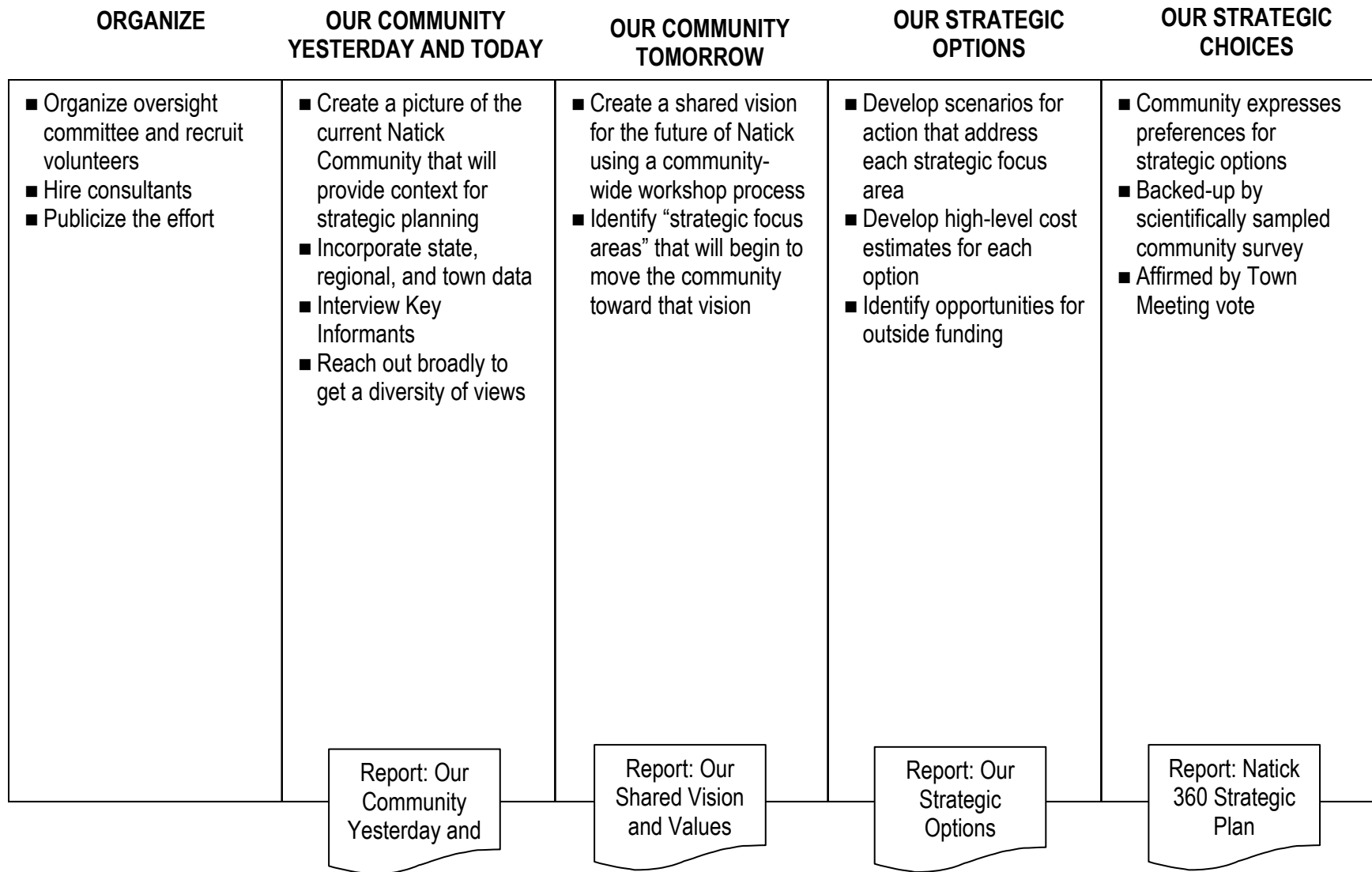
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<sup>4</sup> [http://factfinder.census.gov/servlet/QTable?\\_bm=y&geo\\_id=86000US01760&q\\_r\\_name=DEC\\_2000\\_SF1\\_U\\_DP1&ds\\_name=DEC\\_2000\\_SF1\\_U&lang=en&sse=on](http://factfinder.census.gov/servlet/QTable?_bm=y&geo_id=86000US01760&q_r_name=DEC_2000_SF1_U_DP1&ds_name=DEC_2000_SF1_U&lang=en&sse=on)

<sup>5</sup> [http://factfinder.census.gov/servlet/QTable?\\_bm=y&geo\\_id=86000US01760&q\\_r\\_name=DEC\\_2000\\_SF3\\_U\\_DP3&ds\\_name=DEC\\_2000\\_SF3\\_U&lang=en&redoLog=false&sse=on](http://factfinder.census.gov/servlet/QTable?_bm=y&geo_id=86000US01760&q_r_name=DEC_2000_SF3_U_DP3&ds_name=DEC_2000_SF3_U&lang=en&redoLog=false&sse=on)

## Appendix C. Town of Natick Citizen-Driven Strategic Planning Process



## Appendix D. Professional Services Agreement Standard Form