



# Proposal for a Community Survey for the City of Whitewater, Wisconsin

Submitted to the City of Whitewater, Wisconsin

February 13, 2026





2/13/2026

**Subject: Community Survey for the City of Whitewater, Wisconsin**

Dear Becky Magestro, Chief of Staff:

ETC Institute is pleased to submit a proposal to conduct a community Survey for the City of Whitewater, Wisconsin. ETC Institute is a corporation located in Olathe, Kansas and is owned by our CEO, Christopher Tatham. In response to the City's Request for Proposals, enclosed please find ETC Institute's proposal for these services.

ETC Institute believes that our extensive experience conducting surveys nationwide combined with our client-focused, results-driven approach to project management, makes us uniquely qualified to assist the City of Whitewater in achieving the goals and objectives of this project. This proposal is intended to be completely responsive to the RFP's terms and conditions and has been organized as follows:

**Section 1:** Organizational Background and Relevant Experience

**Section 2:** Proposed Methodology, Sampling Strategy, and Data Collection Plan

**Section 3:** Proposed Timeline and Detailed Budget

**Section 4:** Example of Similar Work and References

**Section 5:** Qualifications and Roles of Project Team

**Section 6:** Optional Enhancements

***Firm Overview***

**ETC Institute is Recognized as a National Leader in the Design and Administration of Market Research for Local Governments.** Since 1982, ETC Institute has completed research projects for organizations in 50 states. ETC Institute has designed and administered more than 3,500 statistically valid surveys and our team of professional researchers have moderated more than 1,000 focus groups and 2,000 stakeholder interviews. During the past five years alone, ETC Institute has administered surveys in more than 700 cities and counties throughout the United States. ETC Institute has also conducted research for more large U.S. cities than any other firm.

**Our database comprises national and regional benchmarks for over 85 local governmental services, derived exclusively from surveys administered by us.** Our firm maintains national and regional data for community surveys that provide our clients with the most up to date and reliable comparative norms. Unlike some comparative databases that use secondary sources, ETC Institute's data is from surveys that were administered by ETC Institute. ETC Institute's database only includes data from surveys that have been administered during the past three years. This will ensure our comparative norms are the most representative of existing attitudes and expectations of residents.

**ETC Institute brings extensive experience working with Wisconsin communities, university cities, and smaller municipalities similar in size and character to Whitewater.** Most recently, we conducted the 2025 Community Survey for the City of Mequon, Wisconsin, providing statistically valid results and actionable priorities to guide local decision-making. We also have significant experience in university-centered communities, including Baldwin City, Kansas (home to Baker University), the City of Atchison, Kansas (home of Benedictine College), and the City of Tempe, Arizona (home to Arizona State University), where we successfully captured the perspectives of both permanent residents and student populations. With Whitewater's population of approximately 14,889 and its strong university presence, we understand the importance of designing a methodology that reflects the voices of homeowners, renters, students, and long-term residents alike. Our experience working with smaller cities allows us to tailor survey instruments, sampling strategies, and reporting approaches to communities where every response carries meaningful weight in shaping strategic direction.

**ETC Institute Has Developed the Most Innovative Analytical Tools to Help the City Understand and Utilize Survey Data.** Amidst resource constraints, prioritizing resident-centric activities is crucial. Our Importance-Satisfaction (I-S) rating tool facilitates this by pinpointing high-impact areas for resource allocation. By identifying services of high importance but low satisfaction, officials can focus efforts where they matter most. Our analysis uncovers satisfaction drivers, presented in both tabular and graph formats for clarity.

**ETC Institute Guarantees That We Will be Very Responsive to Your Needs.** ETC Institute administered a survey to organizations that had used our services and among the 150 clients who responded to the survey, 100% were satisfied with the service they received and 100% indicated they would recommend our firm to other organizations. The reason ETC Institute's customer satisfaction levels are so high is due to our commitment to the needs of our clients. *We routinely go beyond the contractual requirements of a project to ensure the goals and objectives of our clients are achieved.* Our philosophy on customer satisfaction is simple: **we are customer-focused to help our clients be customer-focused.**

## Closing

Market research has evolved over the last 30 years and ETC Institute has been there every step of the way. You will not find an organization that is more committed to your success than ETC Institute. We will do everything we can, without hesitation, to be responsive to your needs during this project, and we will continue to be your partner after the project is completed to facilitate your success over time. If ETC Institute is selected for this project, I (Derek Harvey) will serve as the Project Manager for the duration of the contract. I will do everything possible to ensure each phase of this project meets the high expectations you have set. We appreciate your consideration of our proposal and look forward to your decision. If you have any questions, please do not hesitate to call me at 816-582-0089.

Sincerely,

*Derek Harvey*

Derek Harvey

Project Manager

C: (816) 582-0089

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## Section 1: Organizational Background and Relevant Experience

ETC Institute is a market research firm that specializes in the design and administration of market research for governmental organizations. Founded in 1982 by Dr. Elaine Tatham, our major areas of emphasis include community satisfaction surveys, business satisfaction surveys, recreation needs assessments, community planning surveys, transportation surveys, employee surveys, voter opinion surveys, focus groups, and stakeholder interviews. Our home office is located in Olathe, Kansas and we employ approximately 50 full-time employees where all of the work proposed in this document will take place. Since 1982, ETC Institute has completed research projects for organizations in all 50 states from our home office in Olathe, Kansas. ETC Institute is now owned and operated as an S Corporation by Christopher Tatham and has conducted research for more major U.S. cities and counties than any other firm. Some of the large communities where ETC Institute has conducted surveys include:

- Atlanta, Georgia
- Austin, Texas
- Broward County, Florida
- Buncombe County, North Carolina
- Charlotte, North Carolina
- Cincinnati, Ohio
- Colorado Springs, Colorado
- Columbus, Ohio
- Dallas, Texas
- DeKalb County, Georgia
- Denver, Colorado
- Des Moines, Iowa
- Detroit, Michigan
- Durham, North Carolina
- DuPage County, Illinois
- El Paso, Texas
- Forsyth County, North Carolina
- Fort Worth, Texas
- Fort Lauderdale, Florida
- Houston, Texas
- Henderson, Nevada
- Indianapolis, Indiana
- Kansas City, Missouri
- King County, Washington
- Las Vegas, Nevada
- Los Angeles, California
- Louisville, Kentucky
- Mecklenburg County, North Carolina
- Mesa, Arizona
- Miami, Florida
- Miami-Dade County, Florida
- Milwaukee, Wisconsin
- Montgomery County, Maryland
- Nashville, Tennessee
- Norfolk, Virginia
- Oakland, California
- Oakland County, Michigan
- Oklahoma City, Oklahoma
- Phoenix, Arizona
- Portland, Oregon
- Prince George County, Maryland
- Providence, Rhode Island
- Raleigh, North Carolina
- Reno, Nevada
- San Antonio, Texas
- San Bernardino County, California
- San Diego, California
- San Francisco, California
- St. Louis, Missouri
- SEMCOG, Michigan
- Virginia Beach, Virginia
- Washington, D.C.
- Washtenaw County, Michigan
- Wayne County, Michigan
- Winston-Salem, North Carolina

ETC Institute has a unique understanding of municipal organizations that makes our company ideally qualified for this project. While many other organizations are good at conducting survey research, most corporate or university researchers are not particularly good at helping organizational leaders use the data they collect. For example, in 2001, the City of Oklahoma City conducted a resident satisfaction survey for the first time. Although the survey data was rich with findings, the firm that was hired by the City did not present the results in a manner that was meaningful to city staff and members of the City Council. As a result, the value of the research was extremely limited, and the City did not repeat the survey for four more years. In 2005, the City of Oklahoma City heard about the usefulness of ETC Institute's survey work from other cities who were using our services, so they hired ETC Institute to conduct another community survey. Since 2005, the City of Oklahoma City has used ETC Institute to conduct a survey every year. Our survey data is now actively used by City staff and elected officials to set priorities.

For over 40 years ETC Institute has been helping government organizations use survey data as a guiding force for setting organizational priorities and improving organizational effectiveness. ETC Institute is the most qualified firm in the country to conduct a Community Survey for the City of Whitewater.

## Past Project Experience

We encourage the City to contact our past clients, who can attest to ETC Institute's ability to meet project deadlines, provide accurate cost estimates, and consistently deliver high-quality work. The three projects referenced below were selected to demonstrate ETC Institute's strong history of successfully completing community surveys in communities with demographics similar to those of the City of Whitewater. ETC Institute would be pleased to provide additional past project experience upon request.

**Client:** The City of Mequon, Wisconsin

**Project Name:** 2025 Mequon Community Survey

**Population:** 25,329 **University:** Concordia University Wisconsin

**Year Completed:** 2025

**Project Summary:**

ETC Institute administered a community survey for the City of Mequon during May and June of 2025. The survey was conducted as part of the City's effort to gather resident opinions and feedback on programs and services. The results of the survey will be used to help the City improve existing programs and determine future needs of residents in the City. A six-page survey was mailed to a random sample of households throughout the City of Mequon. The goal was to receive at least 400 completed surveys. This goal was far exceeded, with a total of 705 households responding to the survey. The results for the random sample of 705 households have a 95% level of confidence with a precision of at least +/- 3.7%.

**Client:** The City of Baldwin City, Kansas

**Project Name:** Baldwin City Citizen Satisfaction Survey

**Population:** 4,700 **University:** Baker University

**Year Completed:** 2023

**Project Summary:**

Baldwin City, Kansas conducted its 1st DirectionFinder® Survey during the fall of 2023. The purpose of the survey was to assess citizen satisfaction with the delivery of major city services and to help determine priorities for the community as part of the City's on-going planning process. The seven-page survey, cover letter and postage paid return envelope were mailed to all households in Baldwin City. The cover letter explained the purpose of the survey and encouraged residents to either return their survey by mail or complete the survey online. The goal was to obtain completed surveys from at least 400 residents. This goal was exceeded, with a total of 402 residents completing the survey. The overall results for the sample of 402 households have a precision of at least +/-4.7% at the 95% level of confidence.

**Client:** The City of Tempe, Arizona

**Project Name:** 2025 City of Tempe Community Survey

**Population:** 190,114 **University:** Arizona State University

**Year Completed:** 2025

**Project Summary:**

ETC Institute conducted Tempe's eighteenth annual community survey between June 1 and July 31, 2025, to help identify community priorities and support the City's ongoing strategic planning and budgeting efforts. The survey was mailed to a random sample of households in the City of Tempe. Once the surveys were mailed, ETC Institute sent emails and text messages to the households that received the survey to encourage participation. The results for the sample of 1,001 households have a 95% level of confidence with a precision of at least ±3.09%. There were no meaningful differences in the survey results based on how it was completed. In 2024, 1,055 households completed the survey and in 2023, 1,032 surveys were completed.

**Client:** The City of Atchison, Kansas

**Project Name:** 2025 Atchison Community Survey

**Population:** 10,813 **University:** Benedictine College

**Year Completed:** 2025

**Project Summary:**

ETC Institute administered a community survey for the City of Atchison, Kansas between January and February 2025. The purpose of the survey was to gather input from residents on service quality, priorities and overall performance. This is the third time ETC Institute has administered a community survey for the City of Atchison; the first was conducted in 2018. A seven-page survey was mailed to all households in the City of Atchison. The goal was to receive at least 400 completed surveys. This goal was met, with a total of 463 households completing a survey. The results for the random sample of 463 households have a 95% level of confidence with a precision of at least +/-4.5%.

## Section 2: Proposed Methodology, Sampling Strategy, and Data Collection Plan

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ETC Institute proposes a statistically valid, mixed-mode community survey designed to obtain 500 completed surveys, ensuring a 95% confidence level with a margin of error of approximately  $\pm 4.31\%$  or better. The survey will utilize a random-sample mail and online methodology, supplemented with targeted follow-up strategies to maximize participation and ensure representative input across neighborhoods and demographic groups. The survey instrument will be administered in English and Spanish online, with specific outreach strategies designed to engage students, renters, and other underrepresented populations, reflecting Whitewater's unique university community context.

Survey results will include advanced analytical tools such as Importance-Satisfaction Analysis, GIS mapping by census block group, and national/regional benchmarking comparisons, allowing City leaders to interpret results within both local and comparative contexts. ETC Institute will provide a comprehensive written report and conduct two on-site presentations to share findings with City leadership and stakeholders. All services described in this proposal are included within a clearly defined total not-to-exceed fee, ensuring transparency, cost certainty, and full delivery of all required project components. All three phases of ETC Institute's methodology are explained below:

### Phase 1: Develop the Survey and Sampling Plan

#### Task 1.1 Develop the Survey

Once selected for the project, ETC Institute will meet with City staff via phone or web-based conference to formally kick off the project. The purpose of this meeting will be to discuss the goals and objectives of the study, confirm desired outcomes, and establish a shared understanding of project expectations.

ETC Institute will provide examples of surveys developed for comparable communities to support discussion and facilitate the design process. City input gathered during this phase will be incorporated into developing a survey instrument that meets all project goals and adheres to established ethical standards for neutrality, clarity, and accessibility.

ETC Institute recommends that the 2026 Community Survey be limited to no more than six pages and designed to take approximately 15–20 minutes to complete. While ETC Institute is capable of administering a survey of up to seven pages, shorter surveys consistently achieve higher response rates. As such, ETC Institute will work with City staff to identify opportunities to streamline the questionnaire while preserving critical content.

Based on feedback and direction provided by the City's project team, ETC Institute will prepare the initial draft of the survey for City review. ETC Institute will develop survey questions to assess resident perceptions of community needs, communication with the City, downtown improvements, and key issues facing the City. The survey will also measure preferences and support related to Comprehensive Plan and Strategic Plan priorities, including housing, economic development, land use, recreation needs, sense of community, overall quality of life, and potential policy measures. It is anticipated that three to four drafts of the survey will be prepared before final approval. The City will have the opportunity to review and provide final approval of the survey instrument prior to administration.

ETC Institute will also work with the City to develop a cover letter that will accompany the mailed version of the survey and be used to create a landing page for the online survey. The cover letter will be developed on City letterhead and signed by a City representative. It will explain the purpose of the survey, how resident feedback will be used, and the steps for completing the survey.

ETC Institute recommends including a “research panel” question at the end of the community survey. This question allows respondents to opt in to participate in future City-sponsored research efforts, such as focus groups or follow-up surveys. ETC Institute would manage the opt-in list and assist the City in contacting participating residents as needed.

### ***Translations***

The survey will be designed to reach a diverse range of residents and will be administered in a manner that is sensitive to cultural, legal, and accessibility considerations. The survey instrument will be professionally translated into Spanish for the online version.

ETC Institute will make the Spanish version of the survey available online and can provide other languages if needed. ETC Institute can also offer the option to complete the survey by telephone in multiple languages. The cover letter will include translated language informing non-English speakers that they may complete the survey online in their preferred language or contact a toll-free number to complete the survey by phone. Calls will be handled by interviewers in ETC Institute’s call center, with translator support provided as needed. ETC Institute will work closely with the City to review all available translation and language access options and will recommend the approach that best meets the needs of the City and the objectives of the project.

### **Task 1.2 Design the Sampling Plan**

As a part of Task 1.2, ETC Institute will develop and finalize a sampling plan based on input from the City. Based on previous experience conducting community surveys for similar communities, ETC Institute has included the following sampling plan for the City’s consideration. ETC Institute recommends designing a sampling plan based on completing a minimum of 500 completed surveys - but will include all residential addresses within the sample area in the sampling plan – every household selected will receive a survey and a follow-up. The survey sample will be purchased by ETC Institute from one of the largest brokerage firms in the world who has a list of all residential addresses within the City’s boundaries.

The overall results of 500 completed surveys will have a precision of at least +/-4.31% at the 95% level of confidence. ETC Institute will do everything possible to maximize your investment in our services and will not charge the City any additional fees to provide data entry and verification of responses collected above and beyond the goal of 500. A sample size of 500 completed surveys will allow ETC Institute to provide crosstabulations for key demographic variables such as age, gender, race/ethnicity, income, number of years lived in the City, student status, and others. Demographic data will be used to monitor the distribution of responses to ensure the responding population of the survey is representative of the universe of the sample. If the final results are not representative of the City’s population, ETC Institute has the ability to weight the results by age, gender, and race/ethnicity based on the most recently available Census estimates. ETC Institute will discuss with the City before any weights are applied to the data.

### **Task 1 Deliverables**

ETC Institute will deliver the approved survey instrument and the link to the online survey. ETC Institute will also provide a description of the finalized sampling plan.

## **Phase 2: Administer the Survey**

### **Task 2.1 Administer the Survey**

Once the final survey instrument and sampling plan is approved by the City, ETC Institute will administer the survey. ETC Institute recommends using a hybrid methodology consisting primarily of mail and online surveys. Given the negative impact Caller ID has had on phone survey response rates and the need to ensure diverse populations are well represented, we offer the hybrid mail/online methodology to maximize the overall level of response. Even if respondents do not respond by mail, those who receive the mailed version of the survey are significantly more likely to respond to the survey online because they know the survey is legitimate. The mailed survey will include a cover letter (on official letterhead) that will explain the importance and purpose of the survey, encourage participation, and include a link to the online survey for residents who prefer that option. Although we will rely heavily upon our mail/online approach, ETC Institute has a fully staffed and state-of-the-art call center that will be used to make any necessary follow-ups via phone. A phone number will also be listed on the cover letter that accompanies the mailed survey for customers who prefer to take the survey over the phone.

The following procedures will take place in our mail/online hybrid methodology. All the procedures detailed on the following pages will be delivered in-house at our main office.

#### ***Survey Administration Procedures:***

ETC Institute will work closely with the City to develop a comprehensive communication plan for the survey. As part of this effort, ETC Institute will provide sample press briefings and outreach materials that the City may use to inform residents about the survey. Advance communication and public awareness efforts have been shown to significantly improve response rates and overall participation.

ETC Institute's proposed fees include the printing and mailing of up to 5,000 survey packets and 5,000 reminder postcards. This distribution is designed to achieve a target response rate of approximately 10 percent, with a goal of obtaining completed surveys from 500 residents. ETC Institute has a proven track record of successfully engaging hard-to-reach populations through the use of our multi-mode survey methodology.

Each selected household will receive a mailed survey packet that includes the survey instrument and a postage-paid return envelope. The packet will include a cover letter printed on official City letterhead that explains the purpose of the survey and assures respondents that all responses will remain anonymous. When delivering the data to the City, ETC Institute will geocode respondent addresses to the block level. All personally identifiable information will be removed from open-ended responses, and all reasonable measures will be taken to protect respondent confidentiality and anonymity.

To ensure the survey results are representative of the entire community, ETC Institute will concentrate follow-up efforts in demographic and geographic areas with lower response rates. Follow-up activities may include reminder postcards, text messages, emails, and a second mailing of the survey instrument, if necessary. ETC Institute will also use targeted social media advertising to increase awareness of the survey and encourage participation, particularly among younger residents, non-native English speakers, and other historically underrepresented populations.

All respondents who complete the survey online will be required to provide their home address prior to submitting their responses. ETC Institute will match these addresses against the original sample file to confirm eligibility. Responses submitted without a valid address or from addresses not included in the sample will be retained separately and excluded from the final dataset to preserve the integrity of the sample. If enough responses are received from outside the sample, ETC Institute will provide the data for those responses to the City.

### ***Incentive***

If approved by the City, the cover letter will also include information about an optional survey incentive offered by ETC Institute to respondents who fully complete the survey. Incentives are typically provided in the form of one (1) prepaid \$500 Visa® gift card awarded through an opt-in drawing. Research and ETC Institute's experience have shown that the use of incentives can significantly improve survey completion rates, particularly among hard-to-reach populations. ETC Institute will discuss incentive options with the City during the kick-off call.

### ***Targeted Outreach to Students and University-Affiliated Residents***

Recognizing Whitewater's unique demographic composition as a university community, ETC Institute will implement a targeted outreach strategy to ensure meaningful participation from students while maintaining the integrity of the City's random-sample methodology.

ETC Institute will coordinate with the City to explore opportunities for collaboration with UW-Whitewater to promote awareness of the survey through university communication channels, such as campus newsletters, student portals, or official social media accounts. Complementing the mailed survey process, ETC Institute will implement digital outreach efforts using student-focused channels to reinforce legitimacy and encourage participation among younger residents. These efforts are designed to improve response rates among student households and ensure that survey findings accurately reflect the perspectives of both long-term residents and the university population that plays a central role in Whitewater's economic vitality and community identity.

### ***Data Management and Quality Control***

ETC Institute maintains a comprehensive quality control and quality assurance program that has been developed and refined through the completion of hundreds of research studies involving survey design, administration, focus groups, and other data collection efforts.

The quality assurance program is directly overseen by ETC Institute's Chief Executive Officer, Christopher Tatham, and is integrated into all phases of each project. The program is designed to ensure error-free, high-quality results, with all ETC Institute staff actively participating in quality control procedures. ETC Institute's quality control and assurance methods have been reviewed by the United States Office of Management and Budget.

Through its comprehensive quality control and quality assurance programs, **ETC Institute guarantees that the survey results will be statistically representative of the City.**

### ***Task 2 Deliverables***

ETC Institute will deliver a copy of the overall results to each question on the survey as tables and raw and cleaned datasets, this deliverable will include any open-ended responses from the survey. All responses will be anonymous.

## Phase 3: Survey Analysis and Reporting

### Reporting Kick-Off Meeting

ETC Institute recommends holding a reporting kickoff meeting with City staff prior to the start of report development. This meeting will provide an opportunity to review the reporting approach and discuss any desired updates or refinements for the upcoming report. Addressing these items early in the process will help ensure alignment with City expectations and reduce the need for revisions later in the reporting phase.

### Task 3.1 Analyze the Survey Results

As a part of Phase 3, ETC Institute will use the final results to create a findings report. The analysis tools that will be included as a part of this project are provided below and on the following pages.

#### Task 3.1.1 Importance-Satisfaction Analysis.

By using specific design features, ETC Institute will utilize the survey data to create an Importance-Satisfaction Rating (I-S Rating). The I-S Rating is based on the concept that public agencies will maximize overall satisfaction by emphasizing improvements in those service categories where the level of satisfaction is relatively low, and the perceived importance of the service is relatively high. More than 200 governmental agencies currently use ETC Institute's I-S Ratings. The ratings allow governmental organizations the ability to assess the quality-of-service delivery. During the past 30 years, ETC Institute has continually refined the analysis to maximize its usefulness as a decision-making tool.

2023 Importance-Satisfaction Rating Baldwin City, Kansas Street Maintenance Services						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>Extremely High Priority (IS &gt;.20)</b>						
Condition of brick streets	61%	1	25%	10	0.4565	1
Condition of city sidewalks	59%	2	31%	9	0.4013	2
Condition of city streets	48%	3	47%	7	0.2533	3
<b>High Priority (IS .10 -.20)</b>						
Quality of on-street bicycle infrastructure (bike lanes/signage)	20%	4	31%	8	0.1365	4
<b>Medium Priority (IS &lt;.10)</b>						
City efforts to prevent street flooding	16%	5	60%	5	0.0622	5
Street sweeping services	9%	8	48%	6	0.0451	6
Snow removal on city streets	11%	7	76%	3	0.0274	7
Overall cleanliness of city streets and other public areas	15%	6	84%	1	0.0241	8
Condition of street signs	6%	10	67%	4	0.0197	9
Maintenance of public buildings and facilities (City Hall, Police Station, Public Works buildings, Fire Department, etc.)	7%	9	80%	2	0.0137	10

The table above offers an example of the I-S Rating from the 2023 Baldwin City Community Survey. The table shows that Baldwin City could maximize resident satisfaction with street maintenance services by investing in the condition of brick streets, city sidewalks and city streets. Investments in the maintenance of public buildings and facilities would have the least impact on overall satisfaction because of the low level of importance and already high satisfaction in those areas.

### ***Task 3.1.2 GIS Mapping.***

ETC Institute staff has successfully geocoded survey results for over 100 market research projects within the past three years. Our GIS team will bring highly developed and current skills in automated information collection, data cleanup and manipulation, state-of-the-art geocoding, and database development to this assignment. Our planners and technicians routinely support customer satisfaction analysis and other planning and modeling efforts across the country. The GIS Maps our team creates provide our clients with a visual representation of the areas of the City that are surveyed and can be used as an extremely useful communication tool with City leaders and elected officials.

ETC Institute will prepare maps showing the results of specific questions on the survey by census block group (or other geographic characteristics decided upon by the City). ETC Institute will geocode the home address of survey respondents to the block latitude and longitude coordinates, this ensures the exact location of a respondent's household is not revealed. GIS maps continue to be an effective tool for communicating the results of the survey to elected officials and the public.

### ***Task 3.1.3 Crosstabulations***

Based on a discussion with the City, ETC Institute will create crosstabulations of questions on the survey with key demographic variables (i.e., age, gender, race/ethnicity, income, student status, number of years lived in the City, geographic characteristics (Census tract/other areas), and others. ETC Institute will work with the City to understand the significant differences found in the crosstabulations and can deliver additional data to help understand those significant differences.

### ***Task 3.1.4 Normative Comparisons – Benchmarks.***

Benchmarking is a highly effective tool that helps decision-makers interpret the meaning of community survey data. If 58% of residents are satisfied with the overall quality of the City's public works services, is that good or bad? Without comparative data, it is difficult to know. ETC Institute maintains national, regional, peer-city, and population-based benchmarking data for more than 80 types of local governmental services.

Benchmarking can help local governments understand how their results compare to similar communities. ETC Institute will work with City staff to understand the comparative needs of the project. Based on this discussion, ETC Institute will offer benchmarking options that can include and are not limited to, US average, regional averages, performance ranges based on other surveys administered for ETC Institute clients, as well as population and size-based comparisons. Without comparative data, it is difficult to know how well an organization is performing.

### ***Task 3.1.5 Interactive Data Dashboard – Optional Service***

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

### ***Task 3.1.6 Pulse Surveys – Optional Service***

ETC Institute can administer brief Pulse Surveys following the Community Survey to gather additional feedback on specific issues or proposed initiatives. Typically consisting of one to three focused questions, Pulse Surveys allow the City to quickly test ideas, clarify findings, or measure support for policy options. Using the opt-in research panel included in the primary survey, ETC Institute can efficiently deploy follow-up surveys and provide concise, actionable summaries to support timely, data-driven decision-making.

### **Task 3.2 Prepare a Final Report**

ETC Institute will develop a written report utilizing the analysis tools found in Task 3.1. The report will provide a thorough analysis of the data, including a summary of the results, identification of potential areas of concern, and top priorities for improvement. The report will describe the methods used in conducting the survey and the number of respondents surveyed. The full report will also include the following:

- An **executive summary** that includes the description of the survey methodology, major findings, and a summary of the priorities based on the Importance-Satisfaction Analysis.
- **Charts and graphs** for all questions on the survey.
- **Benchmarking Analysis** comparing the results from Whitewater with regional and national averages as well as peer-cities if needed.
- **Importance-Satisfaction Analysis** that identify the top priorities for improvement and how they should be integrated into budget decisions, delivered in both tabular and matrix formats as described above.
- **GIS Maps** that show visual representation of the areas of the City that are surveyed and can be used as an extremely useful communication tool with City leaders and elected officials.
- **Cross-tabulations** that break down the results by key variables.
- Verbatim **open-ended responses**.
- **Data tables** showing the results for all questions on the survey.
- A copy of the **survey instrument**.

### **Task 3.3 Present the Survey Findings**

Once a final presentation is approved by the City, ETC Institute's project manager will present the findings at a mutually agreed upon date and time. Additional presentations can be requested by the City for an additional fee.

### **Task 3 Deliverables**

Prior to completing the final written report, ETC Institute will meet with the City to discuss recommendations, preliminary results, and the preliminary analysis conducted. Once the City makes their final recommendations, ETC Institute will develop and deliver an electronic version of a draft final report. ETC Institute will also provide the raw survey data in an Excel spreadsheet that includes the latitude and longitude coordinates, at the block level, for all responses. ETC Institute will deliver the link to the final dashboard and provide training on the capabilities and functionality to City staff if requested. Finally, a project manager from ETC Institute will present the findings to the City.

## **Section 3: Proposed Timeline and Detailed Budget**

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Our research plan has been designed to be responsive to the schedule listed in this RFP. Since the surveys are administered in-house, the completion date for the project is completely within our control. ETC Institute is available to start at a date most convenient for the City. Below is a timeline detailing the phases of the survey process:

### **March/April 2026**

- Initial discussion with City to discuss survey goals and objectives
- Timeline is finalized
- ETC Institute provides the City with a draft survey
- City staff reviews the draft survey and provides feedback to ETC Institute

### **April 2026**

- ETC Institute revises the survey based on the City's input
- ETC Institute provides the City with final sampling plan specifications
- ETC Institute provides City with draft survey
- ETC Institute conducts pretest of the survey
- Results of the pretest are reported and discussed – all corrective actions are completed
- ETC Institute revises survey as necessary

### **May 2026**

- City approves survey instrument
- ETC Institute creates online survey
- Press releases issued
- Surveys are mailed
- Data collection begins

### **May/June 2026**

- Data collection continues

### **June/July 2026**

- Data collection ends
- ETC Institute meets with the City to discuss reporting
- Draft report submitted
- City provides feedback on draft report
- ETC Institute edits draft report
- ETC Institute delivers final report in electronic format

### **August 2026**

- Final report delivered
- On-Site presentations

## Detailed Budget

The pricing below is all inclusive and includes pricing for all the services listed in the scope of work. The pricing below reflects ETC Institute’s fees to conduct a Community Survey with 400 and 500 completed responses from Whitewater residents, and the pricing for the optional tasks.

Whitewater Community Survey		
Number of Completed Surveys:	400	500
Margin Of Error:	±4.84%	±4.31%
<b>Phase 1: Develop the Survey and Sampling Plan</b>		
Task 1.1 - Develop the Survey	\$ 1,500.00	\$ 1,500.00
Task 1.2 - Design the Sampling Plan	\$ 1,500.00	\$ 1,500.00
<b>Phase 2: Administer the Survey</b>		
Task 2.1 - Administer the Survey	\$ 11,000.00	\$ 13,500.00
<b>Phase 3: Survey Analysis and Reporting</b>		
Task 3.1 - Analyze the Survey Results	\$ 1,500.00	\$ 1,500.00
Task 3.2 - Prepare a Final Report ( <i>includes executive summary, charts, Importance-satisfaction analysis, Benchmarking, GIS Maps, Crosstabulations</i> )	\$ 1,500.00	\$ 1,500.00
Task 3.3 – Two On-site Results Presentation ( <i>Price includes two presentations in the same visit</i> )	\$ 3,000.00	\$ 3,000.00
<b>TOTAL NOT TO EXCEED</b>	<b>\$ 20,000.00</b>	<b>\$ 22,500.00</b>

### Optional Tasks:

- Additional On-Site Presentations: Add \$2,500
- Webinar Presentations: Add \$500.00
- Additional Translations (Spanish is included in current pricing): \$400 per language
- Dashboard Services: \$7,500.00
- Follow-up Pulse Survey: \$500.00

### Invoices are typically submitted as follows:

- **25%** - when ETC Institute develops the sampling plan and begins designing the survey.
- **25%** - when surveys are approved for printing and mailing.
- **25%** - when survey administration is complete.
- **25%** - when the final report is delivered.

## Section 4: Example of Similar Work and References

We encourage the City to contact our past clients, who can attest to ETC Institute’s ability to meet project deadlines, provide accurate cost estimates, and consistently deliver high-quality work. Each of the references listed has contracted with ETC Institute on a recurring basis to conduct community surveys utilizing a scope of services comparable to those proposed in this document. ETC Institute would be pleased to provide additional references upon request.

**Client Name:** City of Tempe, Arizona  
**Project:** 2025 City of Tempe Resident Survey  
**Contact Name:** Rosa Inchausti, City Manager  
**Email:** rosa\_inchausti@tempe.gov  
**Phone:** 480-350-8999

**Client Name:** City of Plantation, Florida  
**Project:** 2024 City of Plantation Community Survey  
**Contact Name:** Laura Karpaviciute, Assistant City Administrator  
**Email:** lkarpaviciute@plantation.org  
**Phone:** 954-797-2224

**Client Name:** City of Round Rock, Texas  
**Project:** 2024 City of Round Rock Community Survey  
**Contact Name:** Sara Bustilloz, Communications and Marketing Director  
**Email:** sbustilloz@roundrocktexas.gov  
**Phone:** 512-218-5447

**Client Name:** City of Olathe, Kansas  
**Project:** 2025 City of Olathe Community Survey  
**Contact Name:** Susan Sherman, City Manager  
**Email:** Sherman@olatheks.org  
**Phone:** 913-971-8700

## Section 5: Qualifications and Roles of Project Team

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The ETC Institute Team was assembled based on a thorough review of the scope of services requested. The staff members selected to fill key roles must have extensive experience which exceeds the technical requirements for this project. The core skills identified by our team are listed below:

- Strong project management skills and extensive experience with the management of research studies for local government organizations
- Statistical sampling expertise
- Knowledge of local government organizations, especially utility surveys
- All are available to work on this project

All services will be performed, in-house, by ETC Institute staff. ETC Institute has its own mailing department, call center, and web design team. The key members of the project team who will be assigned to the project are listed below:

- **Jason Morado** will assume the role of Senior Project Manager. Mr. Morado has more than 17 years of experience in the design, administration and analysis of community market research. He has served as the project manager and senior researcher on community research projects for over 400 local governmental organizations throughout the United States.
- **Chris Tatham** has managed more than 2,500 community surveys for local governmental organizations across the United States, including numerous surveys throughout the state of Illinois. He has conducted community surveys in nine of the 20 largest U.S. cities and 11 of the 20 largest U.S. counties. He has more experience with the design and interpretation of community survey research for local governments than anyone in the nation. He excels in using survey data to facilitate consensus about organizational priorities. His understanding of local government issues combined with his local experience make him ideally suited to help the City achieve their goals and objectives for this project. Mr. Tatham will serve as a Senior Consultant and will assist the Senior Project Manager in the review and design of the random sample selection, survey instruments, as well as the final report.
- **Derek Harvey** will assume the role of Project Manager and main point of contact on this project. Mr. Harvey has 6 years of experience in administration, development, supervision, and research analysis involving a wide variety of fields. Mr. Harvey will also be responsible for any presentations.

Resumes for all key personnel are available upon request.

## Section 6: Optional Enhancements

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ETC Institute offers the following optional services for clients.

- **Interactive Data Dashboard Services:** ETC Institute can build the City a dashboard or the community survey. This dashboard will allow the City to view results and, in the future, can show trends from multiple surveys. More information can be found in section two.
- **Pulse Surveys:** Pulse surveys are short follow-up surveys administered after the main survey to gather additional insight on specific topics. Using the opt-in question included in the primary survey, ETC Institute can develop brief surveys consisting of one to three questions to further explore areas of interest or clarify findings if the City would like additional detail. More information can be found in section two.