

# Request for Proposals

## Town of Mooresville Citizen Survey Proposal RFP 019-09-0005 Issued September 7, 2018



**Proposals Required by  
September 27<sup>th</sup>, 2018  
4:00 PM**

**Town of Mooresville  
Town Hall  
413 N. Main St  
Mooresville, North Carolina 28115**

**REQUEST FOR PROPOSALS  
FOR A CITIZEN SURVEY  
NOTICE OF REQUEST FOR PROPOSALS**

NOTICE IS HEREBY GIVEN that the Town of Mooresville (hereinafter referred to as "TOWN") is requesting proposals to conduct a Citizen Survey. TOWN will receive such proposals in the office of and addressed to:

Town of Mooresville  
Purchasing Division  
PO Box 878  
Mooresville, NC 28115  
ATTENTION: David Whitaker, Purchasing Manager

TWO (2) COPIES OF THE PROPOSAL WILL BE RECEIVED

UP TO THE HOUR OF 4:00 P.M., TUESDAY, September 27, 2018

The work to be done is more particularly described in the Citizen Survey Request for Proposal Document.

Copies of the Citizen Survey Request for Proposal Document are available from the Town of Mooresville website or by calling the Purchasing Department at 704-662-8534.

The general scope of work for which proposals have been requested includes developing, administering, benchmarking, analyzing and reporting upon a survey of Town residents through random sampling.

**Town reserves the right to reject any or all proposals.**

David Whitaker  
Purchasing Manager

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**REQUEST FOR PROPOSAL  
CITIZEN SURVEY  
SCOPE OF SERVICES & PROPOSAL**

## 1. Purpose

The Town of Mooresville seeks a strategic consultant or consulting team that will guide a group of senior leaders in developing, administering, benchmarking, analyzing and reporting upon a survey of Town residents through random sampling methods that produce a confidence level of 95% with a +/- 5% margin of error.

## 2. Schedule and Submittal

a. RFP Schedule

Issued: September 7, 2018

Written questions due: September 24<sup>th</sup>, 2018 by 4:00 PM

Addendum issued (if needed): September 25<sup>th</sup>, 2018, no later than 3:00 PM.

Proposals Due: September 27<sup>th</sup>, 2018, no later than 4:00 PM

## 3. Written Questions

Questions or comments regarding this RFP (except to inquire about the number of addenda issued) must be in writing and received by the Town of Mooresville no later than 4:00 PM, September 24<sup>th</sup>, 2018. Written questions are to be: (1) mailed to the Purchasing Manager at the address shown below (page 10) or (2) emailed to [dwhitaker@ci.mooreville.nc.us](mailto:dwhitaker@ci.mooreville.nc.us), or (3) faxed to (704) 799-4135, attention Purchasing Manager. Prospective proposers shall respond via fax or email with their intent to submit a proposal, so they may receive any forthcoming addenda.

The Town shall not be obligated to answer any questions received after the above specified deadline or any questions submitted in a manner other than as instructed above.

## 4. Background

Located in the heart of the Carolinas, Mooresville is perfectly situated on Lake Norman. Presenting a stunning panorama with over 520 miles of shoreline, it is the largest man-made lake in the state. Mooresville's placement in the Piedmont Region (the plateau between coast & mountain), is reason to boast of its ideal trifecta location. The Town measures approximately 24 sq. miles of land and is home to a growing population of 40,000 residents and 12,294 households.

Mooresville has enjoyed significant commercial and residential growth recently. Between 2002 and 2013, the tax base grew from \$1.992 billion to \$5.214 billion. Several regional and national companies including Lowes Companies, Inc., NGK Ceramics USA Inc., Cardinal FG, and large well-known retailers like Target, Walmart, Sam's Club, Best Buy, Pet Smart, and Dick's Sporting Goods are in Mooresville.

Mooresville operates under a Council-Manager form of government. The citizens elect a Mayor and six Commissioners as the Town's governing body. The Mayor and two Commissioners are elected at-large. The other four Commissioners represent wards and must live in the ward they represent. The Mayor serves a two-year term, while the Commissioners serve staggered four-year terms. The Mayor, two ward commissioners and one commissioner-at-large run in November of odd numbered years. The Mayor may only cast a vote in case of a tie.

## 5. Proposals

Proposals should respond directly to all criteria outlined in this RFP in a clear and succinct format. Issuance of this RFP does not guarantee a contract will be awarded to any proposer. The Town may reject as non-responsive, at its sole discretion, any proposal or any part thereof that is incomplete, inadequate in its reply, or does not address each of the following areas:

### [Executive Summary, Approach and Project Understanding](#)

Each response shall include an Executive Summary that provides a brief narrative or overview explaining the organization's overall approach to citizen engagement and how the proposed solution will meet the Town's requirements indicated in this RFP. The Executive Summary shall be structured so anyone reading only that section has a clear understanding of the proposed services. The intent of this summary is to convey to the Town that the organization understands the nature of the work, has the required professional skill set, and understands the level of effort necessary to successfully provide the defined services.

### [Organization Information, Team and Professional Qualifications](#)

- Name of your organization, address, telephone number, and contact information for the individual with primary responsibility for this proposal, including email address.
- Provide information as to the qualifications and experience of all executive, managerial, legal and professional personnel to be assigned to this project. Include resumes for proposed lead staff, being sure to note previous work completed that is applicable. Please indicate who from your organization will present findings and analysis to the Town Council and Town staff. We understand that scheduling may influence availability. Please feel free to list multiple options for the representative who would provide the

presentation. Please note the appropriate travel and presentation pricing for the representative as part of the cost proposal.

- Provide demographic information for full time employees in your organization and the location of your nearest office to Mooresville.
- Provide biographical profiles of the individual(s) who will be assigned to the project, their office location, and work contact information.
- Provide an overview of your organization's qualifications and experience in working with governmental clients. List all governmental clients currently under contract and any governmental clients that have terminated their relationship with your organization during the last three (3) years.

## Statement of Work

### Survey Design

- Format the survey questions in the appropriate manner for distribution to selected citizens.
- Provide survey format in both English and Spanish.
- Indicate the ability for the Town to have all custom questions, if desired.
- Written approval from Town staff agreeing to the survey content.

### Survey Administration

- Provide a selection of Town residents generated through random sampling methods that produces a confidence level of 95% with a +/- 5% margin of error. Adhere to respondent privacy/confidential practices.
- Provide each selected citizen with a survey delivered through postal mail. Each mailed survey should have the option to submit responses on a computer or mobile device (phone, tablet, etc.). Provide appropriate safe guards to prevent duplicative participation. Appropriate geographic sampling strategies should be implemented to assist with gaining Town wide representation.
- Administer the survey until the minimum number of completed surveys is achieved. Minimum number will depend on the selection determined by the Town.
- Include alternative options intent on raising the participant response rate. Alternative options may include targeted phone follow-up, incentives or another method that has been demonstrated to raise participation and response rates by a reasonable percentage.

### Survey Results, Reporting and Analysis

- Conduct data entry, quality assurance for processes leading up to administering surveys, and quality control prior to delivering the final report to the Town.
- Provide benchmark data, when available and applicable.
- Provide tabular data for results in Excel format.
- Provide cross tabulations for all key demographic variables. Results should be provided in both weighted and unweighted formats. Weighting may occur if needed to reflect the community's demographics based on Census data.
- Provide a formal report with summary and charts.
- Provide respondent locational data at the highest appropriate resolution that still adhere to respondent privacy/confidential practices.
- Present the survey's results and analysis to Town Council and staff during an onsite visit.
- Agreement that all instruments, documentation, collaborations and presentations created through the processes described in this RFP for the Town of Mooresville will be retained by the Town for use in future citizen engagement efforts. At a minimum, electronic copies of same will be delivered to the appropriate Town staff. Any proprietary work product or process will be identified prior to submission of final reports and presentation(s).

### Benchmark / Historical Data

- Please indicate how peer benchmark data will be presented, meaning, will benchmark data be presented for similar sized jurisdictions only, for all jurisdictions that asked comparable questions, or is there an opportunity to have benchmark data presented in both manners.
- The Town of Mooresville has historical data from a survey completed in 2012. It is available upon request. Please indicate how you will incorporate this data into your survey development and analysis.

### Schedule

- Provide a schedule framework that specifically identifies project milestones for each phase of delivery with a **final completion date (presentation of final survey data to Town) no later than March 15, 2019**. Assume that the Town will make its vendor selection by October 2, 2018 followed by required paperwork, and the selected vendor will have an official start date of October 8, 2018.

### References

Provide a list of at least three references for which similar work has been performed (within past five years) whom the Town may contact regarding qualifications and past performance. The list must include organization name, the title of contact, telephone number, email address for contact, and a brief description of the client. Emphasis should be given to local government clients.

## 6. Projected Timetable

September 7, 2018	RFP Issued
September 27, 2018	Due Date for Proposal – 4:00 PM
October 2, 2018	Staff selects bid for recommendation
October 8, 2018	Contract details finalized and signed – Start Date
By March 15, 2019	Final Report Due

## COST PROPOSAL

The Town desires the most effective combination of price, performance, and quality possible within the constraints of its budget. The Town’s preference is for a not-to-exceed price. Pricing given must be inclusive of all expenses, including travel related expenses. Personnel costs (including estimated hours and rate per hour for each category of personnel) should be itemized. All costs not explicitly stated in the price quotations shown in the proposal will be excluded from payment consideration by the Town if a contract is awarded based on the proposal.

Based on a proposal of completed surveys at a 95% level of confidence at the Town level, Proposers shall give costs for the following assuming a maximum of 100 survey questions:



## Survey Design

- Design
- Bi-lingual Survey (Spanish and English)

## Survey Administration

- Sample Selection
- Selected Citizen Informational Post Card
- Survey Mail Delivery with Cover letter
- Internet/Mobile Device Support

## Increased Response Rate Alternatives

- Targeted Phone Follow-up (per call)
- Incentives Upon Completion

## Survey Results, Reporting and Analysis

- Benchmark Data (when applicable)
- Tabular Data (results only)
- Cross Tabulations for Key Demographic Data
- Importance-Performance Quadrant Priorities Analysis
- Formal Report with Summary and Charts
- Onsite Results Presentation to Town Council and Staff (include all related travel expenses)

Additional Costs (Please Specify):

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## 7. Evaluation Criteria

The evaluation of the proposals will be based on the items listed above in Section 6 as well as compliance to applicable laws and regulations and overall clarity and completeness of response to the proposal.

## 8. Form of Submission

The Town will receive proposals in the office of and addressed to:

Town of Mooresville  
Purchasing Division  
413 N. Main Street  
PO Box 878  
Mooresville, NC 28115

Attention: David Whitaker, Purchasing Manager

Two (2) copies of the proposal will be received up to  
THE HOUR OF 4:00 P.M., THURSDAY, September 27, 2018

The proposal can be delivered via U.S. Postal Service, Commercial Carrier or by Hand. It is the responsibility of each Bidder to ensure their proposal is received on time.

## 9. Terms and Conditions

- Submission of a proposal indicates acceptance by the agency of the conditions contained in this request for proposal unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the Town and the agency selected.
- The Town reserves the right without prejudice to reject any or all proposals, to waive any non-material irregularities or informalities in any RFP, to accept or reject any item or combination of items, and to request additional clarification of proposals.

- c) All proposals received become the property of the Town and information included therein or attached thereto, shall become public record upon their delivery to the Town. Any information deemed by the bidding agency to be protected as a trade secret shall be submitted separately in a sealed envelope along with a statement supporting this assertion.
- d) Any and all costs associated with the preparation of a response to this request are the responsibility of the proposer, and are not to be passed on to the Town.