



March 28, 2024

Cape Elizabeth School Building Advisory Committee
Cape Elizabeth School Department
320 Ocean House Road
Cape Elizabeth, Maine 04107

Dear Members of the Cape Elizabeth School Building Advisory Committee:

Thank you for considering Portland Research Group to conduct a second survey for the Cape Elizabeth School Building Advisory Committee (SBAC). I look forward to working again with you and the rest of the Project Team. This letter will serve as a brief proposal for the project with an overview of the marketing research services we propose and the associated budget estimates. If you have any questions and/or would like additional detail, please do not hesitate to ask.

Background

For the past several years, the Cape Elizabeth School Building Advisory Committee (SBAC) has been working on plans to address several major issues with the Cape Elizabeth School buildings. The SBAC consists of members of the School Board, Town Council, adjunct Cape Elizabeth residents, Town Manager and School Superintendent. It was formed specifically to review various options to address the needs of the School Buildings in Cape Elizabeth. A building proposal requiring the issue of \$115.9 million in School Bonds went to referendum in November 2022 for residents to approve the funding. The referendum failed by a pretty substantial margin, 3,817 against and 2,337 in favor (62% to 38%).

Since so much work went into the proposal and issues with the School Building continue to persist, the SBAC decided to conduct a survey of voters in Cape Elizabeth to better understand why the referendum was defeated and to gain some guidance on what Cape Elizabeth residents were willing to support. Survey results were presented to the SBAC and to residents in a Public Forum (as well as being posted on the School Board website).

The SBAC analyzed the results of the survey and hired Harriman to develop new concepts. Since the initial survey did not contain any actual concepts and was conducted prior to the completion of the

9 Hunts Point Road
Cape Elizabeth, ME 04107-2925
phone 207.699.9261
portlandresearch.com

town property reassessment initiative (residents did not know the impact on their property taxes), the SBAC thought it would be beneficial to conduct a second survey among town residents to test new concepts.

Research Objectives

The primary objective of the marketing research is to determine which of three building proposal concepts Cape Elizabeth voters favor and what adjustments, if any, need to be made. Specific points of learning could include, but would not be limited to:

- Determining the building proposal concept out of three presented Cape Elizabeth voters prefer;
 - Rate each of the concepts on a ten-point scale
 - Identify the most preferred concept
- Identify any adjustments to the preferred proposal that need to be considered;
- Gauge voters' engagement with SBAC information about the school buildings project;
 - Understand if voters feel more informed as a result of the SBAC communications
- Assess voters' perceived importance of possible project outcomes; and
- Collecting comprehensive classification /demographic information.
 - To assess the "goodness of fit" of the survey response sample to Cape Elizabeth demographics.
 - Respondents will be asked if they voted in the November 2022 referendum and if so, how they voted. This data will be used to weight the data to align with the actual voting results.

Methodology

A mailer will be sent to property owners and renters in Cape Elizabeth. The mailer will include an informational insert inclusive of colored renderings for each of three conceptual designs, survey, cover letter and postage paid envelope to use to return completed paper surveys.

Portland Research Group will design a questionnaire for review by the SBAC Project Team. We will go through as many rounds of edits as needed since getting the questionnaire right is fundamental to the success of a marketing research project. We will not move forward with a questionnaire unless it has been approved by the Project Team.

- The questionnaire will consist of four 8.5"x11" sides (11"x17" sheet of paper folded in half). It will include up to 4 open end questions (free response) and no other specify questions (listed

responses with the ability for respondents to enter a different response if needed). Depending on the types of questions, this is about 20 to 25 questions. Surveys will be printed in black and white.

- Color renderings of and additional information about the three conceptual designs will be included in the mailing on three sides of a 11"x17" sheet of paper folded in half. The fourth side of the sheet will contain a cover letter.
- To expedite delivery of the mail package, the survey will be sent using first class postage in a 9x12 outer envelope with a vertical window for the address. A teaser in black and white will be printed on the outside of the envelope to raise the importance of the mailing and to encourage timely response.
- Paper surveys will be made available at the Town Hall, Thomas Memorial Library and Community Center.

In addition to the mailed survey, Portland Research Group will program and host a web version of the survey. We have a state-of-the-art web survey software package. Web survey programs are thoroughly checked and tested manually for typos, aesthetic appeal and logic, and through an automated tool that randomly generates and sends fictitious participants through the survey to make sure the logic is working correctly. In addition, web surveys are tested using several different types of and versions of browsers to ensure compatibility through almost any means of access. Also, web surveys adapt to the type of device being used to access the survey. Other benefits of the Portland Research Group web survey capability include (but are not limited to):

- Developing a "skin" that uses the Portland Research Group and Cape Elizabeth town (SBAC) logo and color palette for a professional and credible appearance;
- Each question is on its own page and respondents are automatically directed to the next appropriate question (through skip logic). We do not need to rely on respondents correctly scrolling to the next question;
- Requiring or not requiring questions to be answered;
- Embedding images, audio and video into the survey (we will embed renderings of the proposed concepts to be tested);
- Randomizing batteries of attributes, questions and/or series of questions to avoid order bias (the proposed concepts will be randomized so people don't always see them in the same order);

- Allowing respondents to back-up or not;
- Assigning ranges of eligible responses to questions;
- Keeping a running total for questions that require respondents to assign points or percentages to a series of items;
- Piping information from earlier responses into later questions to make the questions more personal, relevant and specific;
- Inserting data from a data file to make questions more personal, specific and relevant; and
- Respondents can suspend the questionnaire if they are interrupted or run out of time and then go back to the place where they left off without having to answer questions a second time.

Three sample size options for this research are presented: $n=500$, $n=750$, and $n=1,000$. At the 95% level of confidence, a random sample¹ size of $n=1,000$ generates a maximum sampling error of ± 3.1 percentage points. That is, for a reported 50% where variability is the greatest, one can be 95% sure the results for the entire target population would fall between 46.9% and 53.1%. Confidence intervals for smaller sample sizes are broader: ± 3.6 percentage points for $n=750$, and ± 4.4 percentage points for $n=500$.

- A great benefit of selecting the largest sample size option is the ability to drill down to smaller segments and retain a reasonable sample size. A sample size of $n=50$ is the minimum number of observations Portland Research Group considers quantitative, that is, a sample size that retains some statistical rigor (more observations are generally recommended). Results from sample sizes of less than $n=50$ are reported by Portland Research Group using a percentage accompanied by raw counts to emphasize the directional nature of the sample size (i.e., 50%; 20 of 40 with the “40” footnoted as follows: “Caution, small base size ($n<50$); use for directional purposes only.”).
- Respondents will be screened to include adults 18 years of age or older. We will try to obtain a respondent sample representative of a mix of demographic characteristics. The data can be weighted to emphasize underrepresented groups and deemphasize overrepresented groups to align with the November 2022 referendum outcome and U.S. Census data. Unfortunately, younger respondents are the most difficult to motivate to participate.

¹ Since web surveys are self-administered surveys, they do not produce a random sample and are actually a convenience sample. The margin of error interval is used just as rough proxy for the sample tolerances.

- The very tight schedule for the survey will impact the number of responses we receive. Residents will have just 10 days or so to participate in the research.
- However, included in the budget estimates the cost of receiving n=550 paper survey responses, the number received in 2023.
- Despite the tight schedule, we are likely to receive more responses than included in the three sample size options, which are based on survey responses processed. Surveys to be processed will be randomly selected from the pool of responses.
- Device IP addresses and survey responses will be compared to identify duplication of responses. (There was very little duplication of responses to the survey administered during the summer 2023)
 - We will also employ a “digital finger printing” tool. This tool tracks each unique device used to complete the survey.

All data processing is completed in-house. Paper surveys and web open-end and other specify responses are coded and entered with 100% verification (codes are entered independently twice and then the data sets are compared for any discrepancies. Discrepancies are resolved by reviewing the source inputs.). This step also includes editing responses and cleaning (forwards and backwards) for logical responses based on skip patterns and numerical responses that do not have any parameters controlling them for reasonable ranges.

- A report of actual verbatim responses can be produced upon request.
- For budget purposes, we have assumed the same ratio of web and paper responses that we experienced in 2023: two-thirds web and one-third paper. As such, for the three sample size options we would be processing the following numbers of types of surveys:
 - n=500: 335 web and 165 paper
 - n=750: 502 web and 248 paper
 - n=1,000: 670 web and 330 paper

One set of crosstabs will be produced with a banner consisting of up to eighteen banner points, one of which is the total column. Additional crosstabs will be produced as needed. These tables form the foundation of the analysis.

- Crosstabs consist of tables for each question in the questionnaire. Subgroups to be analyzed are defined as the banner points that run across the top of the tables. Responses to the questions are sorted by the defined subgroups and compared for each question. If the

subgroups are mutually exclusive (respondents cannot be in both groups being compared), testing is conducted to detect statistical differences at the 95% level of confidence.

- As mentioned, the data will be weighted to align it with the November 2022 participation and results and with Cape Elizabeth demographics.

Portland Research Group makes extensive use of charts and tables in its reports to illustrate and emphasize findings. Quantitative reports are developed in PowerPoint unless otherwise instructed. The reports include the following sections: Background, Research Objectives, Methodology, Key Findings, and Detailed Findings. Conclusions and Recommendations are typically included, but will not be included for this project. Appendices for additional data and the questionnaire used are also included.

- Each page of the report can stand on its own.
- Report readers will know exactly what occurred in the study even if they were not involved with it.

A presentation of the results will be given to the School Building Advisory Committee. Portland Research Group will work with the Project Team to make sure the results are properly interpreted and answer any questions that may come up as members of the Project Team read and use the report findings. We like to involve clients as much along the entire process as they are willing to participate to make sure expectations are met (and hopefully exceeded).

Project Timeline

Portland Research Group understands the timeline for fielding the study and processing the data is extremely tight. As much as possible, materials will have to be created in advance. We will develop a detailed project schedule complete with milestones and responsibilities when the project has been approved. We are able to start immediately upon approval.

Estimated Budgets

The estimated budgets cover everything in this proposal. All out of pocket expenses such as express delivery and travel² are not included and billed at cost in addition to project fees. Typically, Portland Research Group bills 50% of the budget estimate upon approval and invoices the balance plus expenses after the project has been successfully completed. If specifications change, we will reassess the budget. Other arrangements can be made if need be.

- n=500 processed completed web surveys: \$27,450 +/- 10%
- n=750 processed completed web surveys: \$28,150 +/- 10%
- n=1,000 processed completed web surveys: \$28,850 +/- 10%

Thank you again for the opportunity to present this proposal. Please let me know if you have any questions and/or need additional information. If you would like to move forward with this project as outlined in this proposal, please complete the attached Authorization Form and return a copy to me.

Sincerely,

Bruce M. Lockwood
President
Portland Research Group
207-699-9261
blockwood@portlandresearch.com

² Vehicle mileage expense is calculated using the IRS business expense rate for vehicle use. The IRS rate for 2023 is 65.5 cents per mile.

Authorization Form

Proposal for the Cape Elizabeth SBAC Survey 2 Marketing Research

(Please select desired option)

- n=500 processed completed web surveys: \$27,450 +/- 10%*
- n=750 processed completed web surveys: \$28,150 +/- 10%*
- n=1,000 processed completed web surveys: \$28,850 +/- 10%*

Accepted on behalf of the Town of Cape Elizabeth

Signature

Date

Please Print Name and Title

This proposal and all information contained herein are the confidential property of Portland Research Group and may not be discussed to any party except as necessary to evaluate this proposal. This prohibition against disclosure shall apply both before and after any award is made on the basis of or in connection with this proposal, whether to Portland Research Group or another party.