

OTAY WATER DISTRICT
COMMUNICATIONS COMMITTEE MEETING
and
SPECIAL MEETING OF THE BOARD OF DIRECTORS

2554 SWEETWATER SPRINGS BOULEVARD
SPRING VALLEY, CALIFORNIA
Boardroom

Tuesday
August 8, 2006
11:30 A.M.

This is a District Committee meeting. This meeting is being posted as a special meeting in order to comply with the Brown Act (Government Code Section §54954.2) in the event that a quorum of the Board is present. Items will be deliberated, however, no formal board actions will be taken at this meeting. The committee makes recommendations to the full board for its consideration and formal action.

AGENDA

1. ROLL CALL
2. PUBLIC PARTICIPATION – OPPORTUNITY FOR MEMBERS OF THE PUBLIC TO SPEAK TO THE BOARD ON ANY SUBJECT MATTER WITHIN THE BOARD'S JURISDICTION BUT NOT AN ITEM ON TODAY'S AGENDA

INFORMATION / ACTION ITEMS

3. DISCUSSION OF THE DISTRICT'S WEBSITE (STEVENS) [10 minutes]
4. DISCUSSION OF THE 2006 CUSTOMER SURVEY (BUELNA) [15 minutes]
5. UPDATE ON BREAKFAST AND BRIEFING EVENT (BUELNA) [10 minutes]
6. ADJOURNMENT

BOARD MEMBERS ATTENDING:

Mark Robak, Chair
Larry Breitfelder

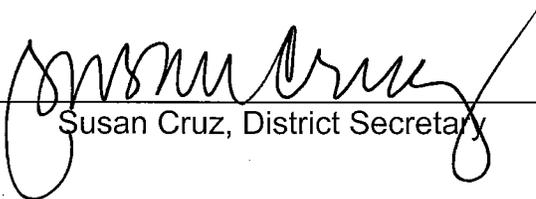
All items appearing on this agenda, whether or not expressly listed for action, may be deliberated and may be subject to action by the Board.

If you have any disability that would require accommodation in order to enable you to participate in this meeting, please call the District Secretary at 670-2280 at least 24 hours prior to the meeting.

Certification of Posting

I certify that on August 4, 2006, I posted a copy of the foregoing agenda near the regular meeting place of the Board of Directors of Otay Water District, said time being at least 24 hours in advance of the meeting of the Board of Directors (Government Code Section §54954.2).

Executed at Spring Valley, California on August 4, 2006.


Susan Cruz, District Secretary

AGENDA ITEM 3

There is no staff report for Item 3.
A verbal update will be provided.



AGENDA ITEM 4

STAFF REPORT

TYPE MEETING:	Communications Committee	MEETING DATE:	August 8, 2006
SUBMITTED BY:	Armando Buelna, Communications Officer	W.O./G.F. NO:	DIV. NO. All
APPROVED BY:			
SUBJECT:	2006 Customer Survey		

GENERAL MANAGER'S RECOMMENDATION:

That the Communications Committee support retaining Rea & Parker Research and Douglas Coe of the Social Science Research Laboratory to conduct the 2006 Customer Service, Satisfaction, and Awareness Surveys.

PURPOSE:

The 2006 Strategic Business Plan calls for implementing a standardized potable and recycled water customer survey. It also emphasized expanding quality control in Finance Customer Service to ensure outstanding Call Center interaction with customers. To accomplish these Strategic Plan objectives, staff recommends retaining Rea & Parker Research and Douglas Coe of the Social Science Research Laboratory to conduct the 2006 Customer Service, Satisfaction, and Awareness Surveys.

BACKGROUND:

In 2005, the district retained Rea & Parker Research and Douglas Coe of the Social Science Research Laboratory to perform a customer survey to establish baselines for assessing overall customer satisfaction and awareness of Otay Water District programs and services. In this survey, customers were called at random from the district's customer base. The 2006 Strategic Plan adopted by the Board of Directors envisioned conducting a follow-up telephone survey to build upon the 2005 study and inquire into topics not covered in that survey.

The 2006 Strategic Plan also calls for expanding quality control in the Finance Department with the goal of ensuring quality Call Center customer service. To address this goal, staff is recommending a separate element of 2006 study which will include a survey of customers who have interacted with the district's Call Center within the past six months. This portion of the survey will focus specifically on interactions with the Call Center.

Because these Strategic Plan goals seek to survey different populations within the district's service area, staff is recommending that two related but separate surveys be conducted.

As noted, Survey I will contact customers at random to assess general attitudes and opinions about overall awareness and satisfaction with district programs and services. Survey II, on the other hand, will only contact those customers who have called within the past six months. This survey will focus primarily the courtesy, knowledge, and general quality of service delivered by the district's Call Center.

In accordance with district procedures, staff solicited bid proposals from ten local and one national research firm to conduct the surveys. Four responses to the Invitation to Bid were received. Proposals were received from Godbe Research, Luth Research, Rea & Parker Research, and Zogby International.

Zogby International was the low bidder at \$19,750, followed by Rea & Parker Research (\$27,500), Luth Research (\$31,700), and Godbe Research (\$33,520 to \$40,485 depending upon the length of the interview).

It is important to note that Zogby International did not include any onsite meetings with staff, board committees, or a site presentation of the survey findings to the board of directors, though a minimum of three site presentations were specified in the Invitation to Bid. Zogby International would be available to meet via teleconference and present the results via video conference. If an onsite meeting or a presentation were desired, the district would pay actual travel costs for a polling/research editor to be present, which they conservatively estimate at approximately \$1,000 per meeting.

Upon review of the four proposals, staff recommends the selection of Rea & Parker Research in conjunction with the Social Science Research Laboratory to develop and conduct the surveys. In contrast with Zogby International, Rea & Parker recommends a minimum of five onsite meetings be held with Dr. Richard Parker and Douglas Coe and the Otay Water District in order to develop and finalize the survey instrument, procedures, and final report format and guidelines.

Staff supports retaining Rea & Parker Research and the Social Science Research Laboratory based on their expertise, the timeliness, professionalism, quality of their work, and their

level of personal service, as well as staff's positive experience working with this firm on the 2005 study.

Rea & Parker Research and the Social Science Research Laboratory also have extensive experience performing surveys for public agencies including the San Diego County Water Authority, local public water districts, and local government throughout San Diego County. As noted above, they also conducted the 2005 OWD customer survey.

FISCAL IMPACT: _____

The cost of conducting the survey projects will total \$27,500. Funding for the study is included in the General Manager's 2006 Budget (GL 5261).

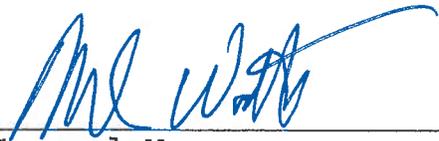
STRATEGIC GOAL:

This project is consistent with the following OWD 2006 Strategic Plan goals:

- 1.A.1 Implement a standardized Potable and Recycled Water Customer Survey.
- 1.A.3 Expand a Quality Control/Audit program to ensure quality customer service.

LEGAL IMPACT: _____

None.



General Manager

Attached:

- A - Rea & Parker Research - OWD 2006 Customer Service, Satisfaction, and Awareness Surveys
- B - Invitation to Bid
- C - Summary of Proposal Rankings by Panel Members

**Otay Water District
2006 Customer Service,
Satisfaction, Awareness
Surveys**

Proposal to

**Mr. Armando Buelna
Communications Officer
Otay Water District
2554 Sweetwater Springs
Blvd.
Spring Valley, CA 91978**

Prepared by

**Rea & Parker Research
P.O. Box 421079
San Diego, CA 92142-1079**

858-279-5070

www.rea-parker.com

June 2, 2006

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June 2, 2006

Mr. Armando Buelna
Communications Officer
Otay Water District
2554 Sweetwater Springs Blvd.
Spring Valley, CA

Re: Otay Water District Survey Research Proposal
Survey I: General Customer Survey
Survey II: Customer Service Survey

Dear Mr. Buelna:

Rea & Parker Research is a survey/market research and economic consulting firm based in San Diego, California, with facilities in Los Angeles and Orange County. It was founded by its present owners, Louis M. Rea, Ph.D., and Richard A. Parker, Ph.D., in 1984 and has grown into a well-respected, financially stable, and substantial research organization with clients throughout the State of California and the Southwest who will attest to the firm's ability to deliver a very high quality product to its clients, with practical recommendations and valuable, actionable findings.

Dr. Parker and Dr. Rea are professors in the School of Public Administration and Urban Studies at San Diego State University. Dr. Rea has also been Director of the School for 23 years. Dr. Parker and Dr. Rea are co-authors of a highly successful book, *Designing and Conducting Survey Research: A Comprehensive Guide*, published by Jossey-Bass Publishers of San Francisco in 1992, with a second edition published in 1997, and a third edition in 2005.

Drs. Parker and Rea have extensive experience in public and urban affairs regarding the collection of primary demographic, attitudinal, and market-related data through survey research and focus group analysis, particularly regarding transportation research and water research. Water related surveys have been conducted for the Otay Water District (baseline 2005 customer satisfaction survey), the San Diego County Water Authority (2000, 2003, 2004, and 2005 public opinion polls, 2003 and 2005 member agency surveys, and 2005 economic climate survey), the City of San Diego Water Department (2004 customer satisfaction survey), North County Co-Permittees Watershed survey (2004), and the San Diego County unincorporated watershed surveys (2004), among others that are detailed in the proposal.

Rea & Parker Research has a significant history of success in deriving marketing data from ethnic minority groups. Further, Dr. Parker and Dr. Rea and are highly regarded economic consultants, particularly in the areas of fiscal impact analysis, urban economic development, and site specific commercial, retail, and residential evaluation.

Mr. Armando Buelna
Otay Water District
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Rea & Parker Research possesses significant expertise in issues pertaining to transportation and growth, along with vast experience in survey research and analysis, focus group research, data collection, and sampling design, all of which are detailed in the Proposal enclosed with this letter of interest.

In association with Douglas Coe, Director of San Diego State University's Social Science Research Laboratory and to meet the objectives of this project, Rea & Parker Research and Douglas Coe propose to:

- design sampling plans and survey instruments,
- coordinate all field data-collection activities
- edit, code, weight, expand, and analyze survey data
- prepare written report of findings
- prepare graphical presentations of the data
- provide final computerized data files

Rea & Parker Research is pleased to respond to this Request for Proposals and to submit this Proposal and Statement of Qualifications in an effort to be selected as the consultant for the Otay Water District 2006 Customer Surveys.

Rea & Parker Research and Douglas Coe (SSRL) are committed to keeping the lines of communication open as the project moves forward. To that end, Rea & Parker Research will provide the Otay Water District Project Manager with frequent progress reports. By using key senior staff members to implement the tasks described above, Rea & Parker Research promises to provide consistent and efficient consulting services to its clients in general, and to Otay Water District, in particular, for this project.

We thank you for the opportunity to propose our services and sincerely hope that our response to your Request for Proposals meets with your satisfaction and approval.

Sincerely,

Richard A. Parker, Ph.D.
President



PROJECT OBJECTIVES

In 1956, the Otay Water District was authorized by the State Legislature and gained its entitlement to imported water. Today, the District serves the water and/or sewer needs of approximately 186,000 people by purchasing their water from the Metropolitan Water District of Southern California through the San Diego County Water Authority. The District takes delivery of the water through several connections to large pipelines owned and operated by the San Diego County Water Authority. Since its inception, the Otay Water District has also collected and reclaimed wastewater generated within the Jamacha drainage basin and pumped the reclaimed water south to the Salt Creek basin where it is used for irrigation and other non-potable uses.

The Otay Water District wishes to conduct a statistically reliable customer satisfaction and customer awareness telephone survey among residential customers. The purpose of the survey is twofold – first, to provide a baseline for measurement of customer satisfaction. Secondly, to provide information concerning customer awareness of and reaction to the communications, utility rates and costs, conservation activity, field service and overall opinions of quality and reliability.

The Otay Water District requests that consultants propose to conduct two distinct surveys, as follows:

Survey I: 300 customers of the Otay Water District will be randomly sample surveyed.

The primary areas of interest are:

- Overall customer satisfaction
- Awareness of rates
- Awareness of formal/written communications
- Awareness of conservation activities/programs
- Awareness of water recycling activities
- Attitudes toward conservation
- Concerns about water supply
- Quality of water supply
- Reliability of supply
- Awareness of sewer operations
- Demographic measures
- Areas of interest concerning water or district issues (open end)
- Other areas as may occur in planning discussions

Survey II: 200 randomly selected customers of Otay Water District who have contacted the District for information and/or customer service during the most recent 6 months.

The primary areas of interest are:

- Call Center interaction—specific instances
- Courtesy of staff
- Clarity and accuracy of responses from staff
- Level of knowledge displayed by Call Center staff
- Experience with field staff

- Quality of service received
- Overall satisfaction with service received
- Use of online services
- Quality of online services
- Demographic measures

Richard A. Parker, Ph.D., Professor, School of Public Administration and Urban Studies—San Diego State University, Louis M. Rea, Ph.D., Professor and Director of the School of Public Administration and Urban Studies—San Diego State University —and Douglas Coe, Director of the Social Science Research Laboratory (SSRL)—San Diego State University are pleased to respond to the Otay Water District Request for Proposal to be the consultant selected to perform both of the surveys, including the overall development, implementation and ensuing analysis of the knowledge, attitudes, and behaviors of the subject population, as more fully described in the Scope of Services section of this proposal that follows Qualifications and Related Experience.

This proposal applies to both surveys, with distinctions made, where appropriate throughout the proposal, and, in particular, with regard to the cost and price component of the proposal.

QUALIFICATIONS AND RELATED EXPERIENCE

RICHARD A. PARKER, Ph.D. and LOUIS M. REA, Ph.D. (Rea & Parker Research and San Diego State University), AND DOUGLAS COE (Director, Social Science Research Laboratory—San Diego State University)

Qualifications

Rea & Parker Research is a survey and market research and economic consulting firm based in San Diego, California, with facilities in Los Angeles and Orange County. Rea & Parker Research has been a significant research firm in public transportation for many years. It was founded by its present owners, Louis M. Rea, Ph.D., and Richard A. Parker, Ph.D., in 1984 and has grown into a well-respected, financially stable, and substantial research organization with clients throughout the State of California and the Southwest who will attest to the firm's ability to deliver a quality product within the originally designated budget and in accordance with the contracted time schedule.

Dr. Parker and Dr. Rea are professors in the School of Public Administration and Urban Studies at San Diego State University. Dr. Rea is also the Director of that School. Dr. Parker and Dr. Rea are co-authors of a highly successful book, *Designing and Conducting Survey Research: A Comprehensive Guide*, published by Jossey-Bass Publishers in 1992, with a second edition published in 1997, and a third edition in 2005.

Drs. Parker and Rea have extensive experience in public and urban affairs regarding the collection of primary demographic, attitudinal, and market-related data through survey research and focus group analysis. **Rea & Parker Research has conducted San Diego region water related awareness and satisfaction surveys for the Otay Water District, San Diego County Water Authority, Imperial Irrigation District, San Diego County, City of San Diego, City of Oceanside, Sweetwater Authority, and San Luis Rey Indian Water Authority**—all of which are detailed in the attached letter of transmittal and list of clients and projects that follow.

Rea & Parker Research has a significant history of success in deriving marketing data from ethnic minority groups. Further, they are highly regarded economic consultants, particularly in the areas of fiscal impact analysis, urban economic development, and site specific commercial, retail, and residential evaluation. Rea & Parker Research has conducted surveys and market research for a significant list of clients, including:

- State of California--Senate Rules Committee
- State of California--Senate Special Committee on Border Issues
- State of California--Office of the Auditor General
- State of California--Office of the Attorney General
- California Department of Transportation (CALTRANS)
- San Diego County Sheriffs Department

- San Diego County Water Authority
- Otay Water District
- San Diego Gas & Electric
- Imperial Irrigation District
- County of San Diego
- County of Orange
- City of San Diego
- City of San Diego Housing Commission
- City of Escondido
- City of Carlsbad
- City of Oceanside
- City of Poway
- City of Davis
- City of St. Helena
- City of Dana Point
- Los Angeles County Metropolitan Transportation Authority
- Southern California Regional Rail Authority (Metrolink)
- Orange County Transportation Authority
- Bay Area Rapid Transit
- Metropolitan Transit Development Board (San Diego Transit)
- Riverside Transit Authority
- Southern California Association of Governments
- SANDAG
- Sweetwater Authority
- Santa Clarita Transit
- Alhambra Community Transit
- Culver City Bus Lines
- Commerce Transit
- Pasadena ARTS
- Cerritos-On-Wheels (COW)
- Santa Monica Big Blue Bus
- Los Angeles Commuter Express
- Torrance Transit
- Carson Circuit
- El Monte Trolley
- Foothill Transit
- San Diego County Taxpayers Association
- San Diego County Law Library
- City Heights Community Development Corporation (City of San Diego)
- Centre City Development Corporation (City of San Diego)
- North Park Main Street Association (San Diego)
- San Luis Rey Indian Water Authority
- La Jolla Band of Mission Indians
- Viejas Enterprises
- Wallace, Roberts and Todd--Planners and Architects (San Francisco)
- Westec Services, Inc. (Salt Lake City)
- Joint Labor/Management Committee-Retail Food Industry
- San Diego/Imperial Counties Labor Council AFL-CIO
- Sweetwater Authority
- PRC Engineering

- RECON, Incorporated
- Christiansen and Wallace
- Stevens Planning Group
- Brian Mooney and Associates--Urban Planners
- Ault, Deuprey, Jones, Danielsen, & Gorman--Attorneys at Law
- Higgs, Fletcher & Mack--Attorneys at Law
- O'Neill, Huxtable & Abelson--Attorneys at Law
- Seyfarth Shaw—Attorneys at Law

Richard A. Parker, Ph.D. is a professor in the School of Public Administration and Urban Studies at San Diego State University where he teaches graduate and undergraduate courses in statistics, survey research, urban economic development, finance, and real estate. Dr. Parker possesses extensive analytical experience in statistical survey research, market analysis, land use, real estate development and valuation, and transportation issues. He will serve as the co-Project Director.

Dr. Parker has been a consultant to both the public and private sectors for almost 30 years. He has specialized in sample survey research for various governmental agencies and market research for retail, commercial, residential, and recreational development. Particular emphasis has been placed upon market research conducted in the field of transportation, with a myriad of rider/on-board surveys, intercept surveys, telephone surveys, and focus group projects having been performed for several transportation agencies. Dr. Parker has further established his reputation with regard to fiscal impact studies, urban redevelopment, and environmental impact/socioeconomic and demographic analyses. Dr. Parker has also been involved on a consultative basis with a number of issues concerning economic and population growth impacts in Southern California and has published a variety of articles, monographs, and books on these subjects. He has further participated in various panel discussions, delivered expert testimony to legislatures and courts, and appeared on several radio and television programs on behalf of his clients. Dr. Parker is a graduate of Brown University, the University of California at Berkeley, and UCLA. He possesses degrees in Business Administration from those institutions (B.S., MBA, and Ph.D.) plus a further graduate degree in City Planning (MCP) from San Diego State University.

Louis M. Rea, Ph.D. is a professor of City Planning and Director of the School of Public Administration and Urban Studies at San Diego State University. Dr. Rea will be co-Project Director. He has taught graduate courses in statistical analysis, transportation planning, survey research, and urban/fiscal problems. He has published a variety of articles, participated in panel discussions, and delivered numerous papers at professional conferences throughout the United States. He has extensive experience as a researcher and consultant in the San Diego area for the past 25 years.

Dr. Rea has conducted surveys in numerous consulting and research assignments for municipal jurisdictions and private businesses throughout Southern California. He has prepared environmental impact reports and market analyses for various commercial/recreational developments. He has analyzed the feasibility of assessment districts and direct benefit financing, and prepared demographic and economic profiles and projections for numerous projects.

Dr. Rea is a graduate of Colgate University in New York, with a M.A. and Ph.D. from Syracuse University in Regional Planning.

Douglas Coe has served as Director of the Social Science Research Laboratory (SSRL) at San Diego State University since 1990. SSRL has been the Archivist for the California (Field) Poll since 1985. Mr. Coe will supervise the programming and computerization of the data and statistical data output. Mr. Coe has extensive experience in computer programming project design, instrument development, data collection and analysis. He has over 30 years experience in research project management and the use of computational systems. Mr. Coe has proven his research capabilities through completed project contracts with government agencies, community organizations, private enterprises in coordinating community surveys, policy evaluations, satisfaction studies and program evaluations. Mr. Coe holds a Bachelor's Degree from the University of California at Riverside and a Master's Degree from San Diego State University. Besides working with Rea & Parker Research on many of the projects referenced listed above and detailed below, additional clients of Douglas Coe and SSRL include:

- Aetna Government Health Plans, CHAMPUS Division
- American College of Preventive Medicine
- California Department of Parks and Recreation
- California State Department of Conservation, Division of Recycling
- California State Department of Health
- Child Abuse Prevention Foundation
- City of Chula Vista Human Services Council
- City of San Diego
- Computer Economics, Incorporated
- The Field Institute, San Francisco
- Girard Foundation
- I Love a Clean San Diego County, Incorporated
- San Diego County, Solid Waste Division
- Industrial Environmental Association of San Diego
- Oceanside Unified School District
- The Office of the Chancellor, California State University
- Office of the Civil Rights Monitor
- Pacific Institute for Research and Evaluation
- Paradise Valley Hospital, National City
- San Diego Association of Governments (SANDAG)
- San Diego Community Foundation
- San Diego Convention and Visitor's Bureau
- San Diego County Department of Health Services
- San Diego County Office of Education
- San Diego County Water Authority
- San Diego Environmental Health Coalition
- San Diego Fluoridation Coalition
- Sweetwater Authority
- The San Diego Union-Tribune and NBC 7/39 Television
- Scripps Memorial Hospitals
- South Bay Union Elementary School District
- The Stevens Cancer Center - Scripps Memorial Hospitals
- Sweetwater Union High School District
- Twenty Second District Agricultural Association, State of California

- UCSD School of Medicine, Dept. of Family and Preventive Medicine
- U.S. National Park Service
- U.S. Navy Health Research Center
- U.S. Navy Special Warfare Group

Selected Sample Survey Research Projects of Rea & Parker Research—references at end of section

Otay Water District

- 2005 customer satisfaction survey of 350 residential customers concerning behavior, opinion, customer service, desalination, water reclamation, and conservation practices.

San Diego County Water Authority

- 2003 San Diego County Water Authority Telephone Public Opinion Survey conducted among 600 telephone respondents in order to assess knowledge, behavior, opinions, and willingness to pay regarding water issues, including reliability.
- 2004 Member Agency Survey was prepared, administered and analyzed regarding customer satisfaction. Project included a total revision of the instrument that had been used for many previous years in order to successfully discern possibilities for improved service by the Water Authority to its member agencies
- 2004 San Diego County Water Authority Telephone Public Opinion Survey: 710 respondents concerning behavior, opinion, future needs assessment issues, desalination, water reclamation, and conservation practices.
- 2005 San Diego County Water Authority Public Opinion Survey: 725 respondents concerning behavior, opinion, future needs assessment issues, desalination, water reclamation, and conservation practices.
- 2004 Engineering Department Employee Satisfaction Survey
- 2005 Member Agency Survey: On-line survey of general managers, division managers, operating heads regarding SDCWA policies and programs
- 2005 Survey of 400 San Diego County public works contractors to identify issues pertaining to project labor agreements and other public works contracting issues, including satisfaction with working in association with SDCWA.

State of California (Senate Rules Committee, Senate Select Committee on Border Issues, and Office of the Auditor General)

- Analysis of fiscal impact of undocumented immigrants on public services in San Diego County, including criminal justice system, education, and public health. Further identified estimated number of undocumented residents and their contributions to State and local tax revenues. Also included in the analysis were federal revenues, false documentation issues, and macro economic impacts. Study included substantial primary data gathering techniques, including direct interviews with undocumented immigrant workers and INS returnees. Prepared, administered, and analyzed sample surveys of undocumented immigrants in San Diego County for purposes of determining employment characteristics, revenue generation, demographics, and migration patterns. Research included extensive face-to-face interviews and structured roundtable discussions.

City of Carlsbad

- Prepared, implemented, and analyzed citywide sample telephone survey of 600 respondents concerning future urban commercial development in this fast growing Northern San Diego County city. Extensive analysis of underlying values through conjoint analytical techniques was featured.

County of Orange

- Prepared, implemented, and analyzed 1,040 person telephone survey of unincorporated area (North Tustin) in order to assess level of service satisfaction issues and potential annexation/sphere of influence adjustments.

City of San Diego

- Prepared, implemented, and analyzed 400 person telephone survey of residents of three low income San Diego communities concerning issues such as crime, economic development, city services, and the success of the City's "Weed and Seed Program."
- Prepared, administered, and analyzed sample survey of San Diego County residents for purposes of assessing utilization and demand factors for Mission Bay Park in San Diego. This survey of 850 persons served to inform the revision of the Park's Master Plan.
- Analysis of market for existing condominium developments in downtown San Diego. Detailed analysis included extensive survey and corresponding statistical and qualitative analysis including recommendations for future market composition.
- Consultant for the revitalization of an older commercial retail area in mid-city San Diego seeking to rejuvenate its retail base. Three surveys and a series of key

participant discussions were performed in conjunction with this effort--existing retailers, potential retailers, and residents of the area--plus corresponding statistical and qualitative analysis. Final report included a recommended retail structure for the community that would be realistic, implementable, and sensitive to the diversity of ethnicity in this community.

- Conducted 600 person telephone survey in mid-city for purposes of establishing need for community court in the area populated by myriad low-income minority and immigrant groups. Also in-person interviews/surveys of 100 local business owners.
- Conducted 400 person customer satisfaction survey for City Water Department, with emphasis, in particular, on water recycling.

San Diego County

- Public awareness survey of 1300 County residents regarding water quality and watershed protection, including level of knowledge, behavior, and opinion components.

San Diego County Sheriff's Department

- Established sampling methodology for analysis by station (11) of workload and availability for calls for service among Sheriffs patrol deputies. Over 3,000 samples drawn and analyzed to establish manpower needs.
- Sample of Communications Center 911 and administrative calls to determine optimal workload shifts and total personnel required.
- Utilized scientific sample to analyzed time savings applicable to the conversion of arrest data to laptop computers from manual entry. Final report included specific determination of manpower hours saved and recommendations for software and operational policy changes in order to maximize technological advantages.

Orange County Transportation Authority

- Marketing program consultant including two 600 person surveys among Latino and senior residents of Orange County and 12 focus groups to identify market-enhancing opportunities for transit service.
- Conducted CenterLine Customer Profile for the Orange County Transportation Authority involving intercept surveys of 8,800 potential urban light rail users and 1,500 telephone survey interviews. Final analysis assessed likely ridership, preferred destinations, trip purposes, demographic and psychographic profiles of potential light Metro Rail ridership.
- Conducted 2,000 person rider/on-board bus survey for the Orange County Transportation Authority regarding monthly, weekly, and daily bus pass sales.

Prepared questionnaire, administered survey, analyzed data in order to assess potential for expanding bus pass sales.

- Prepared Multi-Cultural Market Assessment Study for transportation services in Orange County. Formulated baseline data and marketing strategies for long- and short-term transportation related issues facing Orange County's diverse multi-cultural communities, with particular emphasis upon Hispanic and Vietnamese communities. Administered three different statistical surveys including intercept and rider/on-board formats, each in English, Spanish, and Vietnamese.
- Conducted Vietnamese ridership study, including in-person intercept survey, telephone sample survey, and focus group among Vietnamese community leaders regarding current bus service and future transit needs in the Vietnamese areas of Orange County.
- Sample survey of 400 bicycle commuters.

Los Angeles County Metropolitan Transportation Authority (MTA)

- Rider/on-board 2002 Bus survey for Los Angeles County Metropolitan Transportation Authority, including 40,000 rider/on-board surveys, 2,500 follow-up telephone interviews, and 10 focus groups. Includes additional surveys for **Alhambra Community Transit, Culver City Bus Lines, Commerce Transit, Pasadena ARTS, Cerritos-On-Wheels (COW), Santa Monica Big Blue Bus, Los Angeles Commuter Express, Santa Clarita Transit, Torrance Transit, Carson Circuit, El Monte Trolley, and Foothill Transit.**
- Rider/on-board 2002 Rail survey for Los Angeles County Metropolitan Transportation Authority, including 15,000 rider/on-board surveys, 1,000 follow-up telephone interviews, and 3 focus groups.

Southern California Regional Rail Authority (Metrolink)

- Obtained precise counts of passenger boardings and alightings at each station for each train in the Metrolink train system and conducted a 3,500 person rider/on-board sample survey regarding customer satisfaction for the Southern California Regional Rail Authority (Metrolink). Analysis included comparative data analysis of trends from the 1997 rider/on-board survey (also conducted by Rea & Parker Research) and from 1995.
- Computerized, analyzed, prepared final report, and presented findings for 6000 rider/on-board rail passenger surveys for the Southern California Regional Rail Authority (Metrolink) regarding customer satisfaction. Analysis included comparative data analysis of trends from previous rider/on-board surveys.
- Determined the requisite two-stage sample for Federal Transportation Agency requirements for annual passenger and mileage calculations.

California Department of Transportation

- On-Line Survey and focus groups with CALTRANS engineers concerning internal job issues.

Riverside Transit Agency

- On-board customer satisfaction survey, passenger count, and ride check of 100% of system—weekdays and weekends

Southern California Association of Governments

- 800 person survey and 6 focus groups to determine desired route for high-speed rail from Northern California between Los Angeles and San Diego
- 5,000 respondent cross-border transportation survey at 3 Imperial County border checkpoints—24 hours (weekends and weekdays)

University of California-Berkeley

- Panel based survey of participants in pilot study of commute by rail with pooled rental car available at work location and rail station.
- Survey of riders of Metrolink between Riverside and Los Angeles re: location of new station and potential bus connection routes

North Park Main Street Association

- Conducted two intercept surveys--business owners and shoppers in San Diego Main Street National Historic Preservation Area in order to determine shopping needs and level of improvement or decline in area since the implementation of the Main Street program.

City of Davis

- Prepared, administered, and analyzed sample survey of 833 residents of Davis, California for purposes of assessing utilization, demand, and tax allocation factors for City of Davis Department of Parks and Recreation in concert with the preparation of the Master Plan.

City of St. Helena

- Prepared, administered, and analyzed sample survey of City of St. Helena, California residents for purposes of General Plan revisions.

City of Poway

- Prepared, administered, and statistically analyzed a mail survey of 800 Poway businesses regarding their needs and opinions concerning Poway's business climate and future opportunities. Final report included detailed analysis and exposition, including recommendations where appropriate.
- Prepared, administered, and statistically analyzed a mail survey of 6,000 Poway households concerning their opinions regarding a variety of issues of importance to the City for future planning. Final report included fully tabulated results with accompanying statistical reports.

City of Dana Point

- Prepared recreation and parks needs assessment survey for administration to general public.

City of Oceanside

- Public awareness survey of 800 Carlsbad and San Luis Rey watershed residents, including level of knowledge, behavior, and opinion components.

Sweetwater Authority

- Public awareness survey of 400 residents of the water agency, including level of knowledge, behavior, and opinion components.

Imperial Irrigation District

- Statistical modeling of power demand
- Instructed employees of Energy Supply and Trading division in statistical techniques

San Luis Rey Indian Water Authority

- Prepared and supervised administration of detailed census and opinion survey of 2,500 members of five Indian tribes. Particular emphasis was given to issues of importance to the tribes' members such as job opportunities, education, cultural issues, economic development opportunities and transportation access issues. Focus group sessions with each tribe were utilized to complement the survey findings. Final report included both census data and fully tabulated and statistically analyzed summary of the opinions of reservation residents.

City of Escondido

- Prepared, administered, and statistically analyzed telephone survey of 425 residents concerning library facilities.

Stoorza, Ziegaus & Metzger — Public Relations

- Conducted city-wide (San Diego) survey of voter opinion (850 participants) concerning the initiative to change the name of Dr. Martin Luther King, Jr. Way to Market Street and related issues.

MNA Consulting, Inc.

- Prepared, administered, and analyzed sample survey of City of Poway, California citizens in order to assess demand factors for new public library facility.

San Diego Housing Commission

- In accordance with the City of San Diego SRO Preservation Ordinance, a survey/inventory of all existing guest rooms in the City of San Diego was performed in order to retroactively identify rooms that qualified as single room occupancy hotel rooms as of December 1985, December 1987 and May 1988. The purpose of this survey was to identify a baseline number of such units for presentation purposes. Prepared survey instrument, SRO identification methodologies, computerization formats, statistical analyses, and final report with room-by-room breakdown.

San Diego County Department of Planning and Land Use

- Evaluated the San Diego Community Planning Process as viewed by planning group participants and informed parties (developed questionnaire, analyzed data, and prepared a final report).

San Diego County Law Library

- Prepared and implemented 5 specific survey research projects among law library course attendees, librarians, and non-attendees.

Stevens Planning Group, Inc.

- Conducted economic/marketing analysis of proposed 2500-acre resort development in East San Diego County. Analysis included examination of comparable projects plus administration of surveys to target Services groups of potential users of proposed resort activities. Surveys were tabulated and statistically analyzed and then combined with reconnaissance of comparable projects in formal report to client.

Higgs, Fletcher & Mack

- Analyzed and testified as expert witness regarding statistical survey concerning appraisal of commercial real estate subject to condemnation.

Seyfarth Shaw

- Testified as expert witness regarding adequacy of statistical survey sampling of employees in class action lawsuit

References:

Mr. John Liarakos, Media Relations
Mr. Paul Lanspery, Deputy General Manager
Mr. Dennis Cushman, Asst. General Manager
San Diego County Water Authority
4677 Overland Ave.
San Diego, CA 92123

Tel. 858-522-6703 (Liarakos)
Tel. 858-522-6783 (Lanspery)
Tel. 858-522-6785 (Cushman)

Commander Robert J. Apostolos
Gail Larsen, Communications Coordinator
San Diego County Sheriff's Department
9621 Ridgehaven Court
P.O. Box 429000
San Diego, CA 92142

Tel. 858-974-2319 (Cmdr. Apostolos)
Tel. 858-565-5498 (Larsen)

Ms. Lisa Briggs
Policy Advisor to Mayor Jerry Sanders, City of San Diego
202 C Street
San Diego, CA 92101

Tel. 619-236-6330

Mr. Nigel Blampied
Director of Operations
State of California
Department of Transportation (Caltrans)
1120 N Street
Sacramento, CA 95814

Tel. 916-654-5266

Richard A. Parker, Ph.D.

Education

- Ph.D. University of California, Los Angeles (Los Angeles, California)
Doctor of Philosophy
- M.B.A. University of California, Berkeley (Berkeley, California)
Master of Business Administration
Teacher Certification — Lifetime Secondary Credential
(Business, Social Studies, English)
- M.C.P. San Diego State University (San Diego, California)
Master of City Planning
- B.S. Brown University (Providence, Rhode Island) and
University of California, Berkeley (Berkeley, California)
Bachelor of Science — Business Administration
(Phi Beta Kappa)

Selected Related Professional Experience

1985- Professor, School of Public Administration and Urban Studies, San Diego State University, San Diego, California. Courses taught:

- Seminar in Urban Planning Methodologies (graduate)
- Issues in Financing Urban Development (graduate)
- Quantitative Methods (Statistics) (graduate)
- Seminar in Quantitative Approaches to Public Administration (graduate)
- Quantitative Techniques in Urban Planning (graduate)
- Methods of Analysis in City Planning (upper division undergraduate)
- Contemporary Urban Issues (upper division undergraduate)
- The Metropolitan Area (upper division undergraduate)
- Public Policy (upper division undergraduate)
- Decision Making in the Public Sector (upper division undergraduate)
- Public Finance (graduate and upper division undergraduate)
- Seminar in Economics of Urban and Regional Planning (graduate)

1982- President/Project Director, Rea & Parker Research

Research Clients include:

- State of California--Senate Rules Committee
- State of California--Senate Special Committee on Border Issues
- State of California--Office of the Auditor General
- State of California--Office of the Attorney General
- California Department of Transportation (CALTRANS)
- San Diego County Sheriffs Department
- San Diego County Water Authority
- San Diego Gas & Electric

- Otay Water District
- Imperial Irrigation District
- County of Orange
- County of San Diego
- City of San Diego
- City of San Diego Water Department
- City of San Diego Housing Commission
- City of Escondido
- City of Carlsbad
- City of Oceanside
- City of Poway
- City of Davis
- City of St. Helena
- City of Dana Point
- Los Angeles County Metropolitan Transportation Authority
- Southern California Regional Rail Authority (Metrolink)
- Orange County Transportation Authority
- Bay Area Rapid Transit
- Metropolitan Transit Development Board (San Diego Transit)
- Southern California Association of Governments
- Santa Clarita Transit
- Riverside Transit Agency
- Sweetwater Authority
- San Diego County Taxpayers Association
- San Diego County Law Library
- City Heights Community Development Corporation (City of San Diego)
- Centre City Development Corporation (City of San Diego)
- North Park Main Street Association (San Diego)
- San Luis Rey Indian Water Authority
- La Jolla Band of Mission Indians
- Wallace, Roberts and Todd--Planners and Architects (San Francisco)
- Westec Services, Inc. (Salt Lake City)
- Joint Labor/Management Committee-Retail Food Industry
- San Diego/Imperial Counties Labor Council AFL-CIO
- PRC Engineering
- RECON, Incorporated
- Christiansen and Wallace
- Stevens Planning Group
- Brian Mooney and Associates--Urban Planners
- MNA Consulting Services
- Stoorza, Ziegau, & Metzger--Public Relations
- Ault, Deuprey, Jones, Danielsen, & Gorman--Attorneys at Law
- Higgs, Fletcher & Mack--Attorneys at Law
- O'Neill, Huxtable & Abelson--Attorneys at Law
- Seyfarth Shaw—Attorneys at Law

1971-1982 Director of Real Estate Operations, David Capell & Co., Beverly Hills, CA
Directed the real estate operations of a large entertainment industry business management firm. Functions included researching, investigating, analyzing and selecting for investment millions of dollars of real estate annually plus accounting, tax and estate planning specifically tailored to each client's needs. Shopping centers, office buildings, apartment complexes, and unimproved investment property were all transacted. Negotiated purchases, sales, refinancing, and restructuring and supervised the ongoing management of these investments.

Selected Publications

Books

Designing and Conducting Survey Research: A Comprehensive Guide (with Louis M. Rea, Ph.D., 1992 (2nd edition 1997—3rd edition 2005). Jossey-Bass, Inc., Publishers, San Francisco.

Monographs/Research Reports

Cost Benefit Analysis: A Case Study of the Berkeley Park Marina Shopping Center, University of California, Berkeley, California, 1971, 168 pp.

The Economics of Environmental Restrictions on the Use of Urban Land, Institute of Urban and Regional Development, University of California, Berkeley, California (with Leonard Merewitz, Ph.D.), 1973, 79 pp.

Back to the City: The Middle Income Housing Market in Centre City San Diego, San Diego State University, San Diego California, 1984, 258 pp.

The Fiscal Impact of Undocumented Immigrants Residing in San Diego County, State of California, Office of the Auditor General, 1992, 129 pp.

Illegal Immigration in San Diego County: An Analysis of Costs and Revenues, State of California, State Senate Office of Reproductions, 1993, 172 pp.

Articles

"Water Supply for Urban Southern California: An Historical and Legal Perspective," Glendale University Law Review, Vol. 8, Nos. 1-2, 1988.

"The Retail Commercial Strip in Transition: A Case Study in San Diego," The Western Governmental Researcher (with Louis M. Rea, Ph.D.), Fall, 1989.

Louis M. Rea, Ph.D.

Education

- Ph.D. Social Science, The Maxwell School, Syracuse University, 1975
- M.R.P. Department of Regional Planning, The Maxwell School, Syracuse University, 1973
- B.A. Economics, Colgate University, Hamilton, New York, 1971
(Phi Beta Kappa, cum laude, honors in economics)

Professional Experience

Professor and Director: School of Public Administration and Urban Studies, San Diego State University, 1975-present. Manage an academic department with a budget of \$1 million; responsible for resource allocation and the purchase of supplies and equipment; supervise 20 full-time faculty and several staff personnel; responsible for hiring part-time faculty from the professional community.

Vice-President/ Project Manager: Rea & Parker Research, 1982-present

Research Clients include:

- State of California--Senate Rules Committee
- State of California--Senate Special Committee on Border Issues
- State of California--Office of the Auditor General
- State of California--Office of the Attorney General
- California Department of Transportation (CALTRANS)
- San Diego County Sheriffs Department
- San Diego County Water Authority
- San Diego Gas & Electric
- County of San Diego
- County of Orange
- City of San Diego
- City of San Diego Housing Commission
- City of Escondido
- City of Carlsbad
- City of Oceanside
- City of Poway
- City of Davis
- City of St. Helena
- City of Dana Point
- Los Angeles County Metropolitan Transportation Authority
- Southern California Regional Rail Authority (Metrolink)
- Orange County Transportation Authority
- Bay Area Rapid Transit
- Metropolitan Transit Development Board (San Diego Transit)
- Southern California Association of Governments
- Santa Clarita Transit
- Sweetwater Authority

- San Diego County Taxpayers Association
- San Diego County Law Library
- City Heights Community Development Corporation (City of San Diego)
- Centre City Development Corporation (City of San Diego)
- North Park Main Street Association (San Diego)
- San Luis Rey Indian Water Authority
- La Jolla Band of Mission Indians
- Wallace, Roberts and Todd--Planners and Architects (San Francisco)
- Westec Services, Inc. (Salt Lake City)
- Joint Labor/Management Committee-Retail Food Industry
- San Diego/Imperial Counties Labor Council AFL-CIO
- PRC Engineering
- RECON, Incorporated
- Christiansen and Wallace
- Stevens Planning Group
- Brian Mooney and Associates--Urban Planners
- MNA Consulting Services
- Stoorza, Ziegus, & Metzger--Public Relations
- Ault, Deuprey, Jones, Danielsen, & Gorman--Attorneys at Law
- Higgs, Fletcher & Mack--Attorneys at Law
- O'Neill, Huxtable & Abelson--Attorneys at Law

Selected Publications

Books

Designing and Conducting Survey Research: A Comprehensive Guide (with Richard A. Parker), Ph.D., 1992 (2nd edition 1997—3rd edition 2004). Jossey-Bass, Inc., Publishers, San Francisco.

Monographs/Research Reports

The Fiscal Impact of Undocumented Immigrants Residing in San Diego County, State of California, Office of the Auditor General, 1992, 129 pp.

Illegal Immigration in San Diego County: An Analysis of Costs and Revenues, State of California, State Senate Office of Reproductions, 1993, 172 pp.

An Arts Plan for the San Diego Region — Region 1: An Inventory of Artists, Organizations, Facilities, and Economic Impact

Louis M. Rea, Ph.D. & James A. Clapp, Ph.D.

State-Local Partnership of the San Diego Region, August 1982

Articles

"The Retail Commercial Strip in Transition: A Case Study in San Diego," The Western Governmental Researcher (with Richard A. Parker, Ph.D.), Fall, 1989.

"Urban Forestry: Some Preliminary Research"

Western Governmental Research Journal, Vol. 1, No. 2, 1984.

“A Quantitative Comparison of Second Generation Rent Control Ordinances”

Louis M. Rea, Ph.D. and Dipak K. Gupta, Ph.D.

Urban Affairs Quarterly, Vol. 19, No. 3, March 1984.

“Direct Benefit Financing: An Opportunity for Local Government”

Louis M. Rea, Ph.D., Glen W. Sparrow, Ph.D., and Dipak K. Gupta, Ph.D.

Public Administration Quarterly, Vol. 7, No. 3, Fall 1984.

Douglas S. Coe

Education:

- 1986 M.A. San Diego State University
1968 B.A. University of California, Riverside

Professional Experience:

- 1990 - present Director
 Social Science Research Laboratory
 San Diego State University
- 1982 - 1989 Associate Director
 Social Science Research Laboratory
 San Diego State University
- 1977 - 1982 Coordinator of Instructional Services
 Social Science Research Laboratory
 San Diego State University

Douglas Coe is the Director of San Diego State University's Social Science Research Laboratory. Coe has thirty years of experience in designing and conducting social research studies and in administering programs that support academic computing. As Director, Coe administers programs that support social research and computing at the University and in the greater community. These programs are provided through the six units described below.

Research Services offers a complete range of public opinion polling and survey research services, including sample design, data collection, data reduction, graphic presentation of data, statistical analysis and data archiving. The section maintains computer systems to support faculty research. Undergraduate internships and research assistant positions are available. Typical research clients include units of government, community groups, SDSU faculty research projects, and University administrative units.

Instructional Services works closely with faculty to assimilate technological resources into the curriculum and to support academic computing among students and faculty. This is accomplished through four programs: (1) Social Science 201 A through D courses on the use of the Statistical Package for the Social Sciences, Database, Spreadsheet, and Internet Resources, (2) non-credit workshops on the use of selected software applications, (3) class presentations at the request of faculty to support computer-related instructional assignments, and (4) on-demand consultation for individual users of open-access computing laboratories.

Data Resources assists faculty and students in the use of archived research, datasets from a variety of on-line information resources, and provides database programming services for specific applications. Principal sources of archived and electronically accessible information include the Inter-University Consortium for Political and Social Research (ICPSR), the Social Science Database Archive (SSDBA), the U.S. Census, Field Institute California Polls, the Roper Center for Public Opinion Research and Lexis/Nexis. Assistance is provided for locating, downloading, installing, and subsetting datasets for instructional or research use.

Systems Support Group provides network administration and technical infrastructure support for

College of Arts and Letters computing systems. Services include managing computer classrooms, network design, implementation and administration, installing software applications, electronic mail, Internet related software, interfacing peripherals, virus diagnosis, file recovery, disk management, operating systems, and procurement advice. Faculty and staff requests for assistance are initiated and tracked through an on-line work order system.

South Coastal Information Center (SCIC) contracts with the California Office of Historic Preservation (OHP) to provide information management for all cultural resources in San Diego County. SCIC is a source of valuable research data for archaeologists, historians, and architects. Databases in historic resources and prehistoric and historic archaeology are maintained and constantly updated. Site data and building information are electronically stored, and over 3,000 historical and archaeological reports are available. Geographic information system software provides accurate mapping of archaeological site data. Student interns master the basics of historic preservation laws and regulations, while learning effective cultural resource information management.

Research Contracts

Community and Governmental Organizations:

- Aetna Government Health Plans, CHAMPUS Division
 - Survey of CHAMPUS Beneficiaries (1995)*
 - Survey of CHAMPUS Medical/Surgical Providers (1995)*
- American College of Preventive Medicine
 - National Survey of Physician Compensation (1989)*
- California Department of Parks and Recreation
 - South Coastal Information Center (1987 through present)*
- California State Department of Conservation, Division of Recycling
 - Redondo Beach Community Survey on Recycling (1996)*
 - Santa Cruz Community Survey on Recycling (1996)*
 - Pacific Beach Community Survey on Recycling (1995)*
 - Pacific Beach Business Improvement Association Survey on Recycling (1995)*
- California State Department of Health
 - State-wide Survey of Childhood Immunization Issues Among African-American Households (1997)*
- Child Abuse Prevention Foundation
 - Evaluation of Alcohol Related Birth Defects Prevention Media Campaign (1991)*
- City of Chula Vista Human Services Council
 - Chula Vista Human Needs Assessment Survey (1992)*
- City of San Diego
 - Citizens' Satisfaction with City Services (1996)*
- Computer Economics, Incorporated
 - National Survey of Corporate Information Systems Managers (1997; 1998; 1999)*
- The Field Institute, San Francisco
 - Archivist for the California Field Poll (1985-1999)*
- Girard Foundation
 - Evaluation Study of the Girard Foundation Technology Assistance Program (1997)*
- I Love a Clean San Diego County, Incorporated

- San Diego County, Solid Waste Division
Attitudes and Perceptions Regarding the Recycling of Used Motor Oil (1997; 1998)
- Industrial Environmental Association of San Diego
Perceptions of Exposure to Industrial Hazardous Materials (1995)
- Oceanside Unified School District
Survey of District Parents and Community Members (1998)
- The Office of the Chancellor, California State University
Public Perceptions of San Diego State University (1999)
Public Perceptions of California State University, Los Angeles (1999)
Public Perceptions of California State University, Stanislaus (1999)
- Office of the Civil Rights Monitor
National Testing Project (1997-1999)
- Pacific Institute for Research and Evaluation
Evaluation of Efforts to Reduce Cross-Border Binge Drinking (1998-2001)
- Paradise Valley Hospital, National City
Mammography Follow-up Study (1994)
Mammography Baseline Study (1992)
- San Diego Association of Governments (SANDAG)
Interstate 15 Congestion, Pricing, Monitoring and Evaluation Project (1996-1999)
- San Diego Community Foundation
Give Five Community Survey (1990; 1992)
- San Diego Convention and Visitor's Bureau
Membership Study (1999)
- San Diego County Department of Health Services
Alcohol Use and Alcohol Problems Among San Diego County Residents with Special Emphasis on Women (1989)
- San Diego County Office of Education
Utilization of Instructional Television Programming Among Educational Professionals (1997)
Viewership Survey for San Diego County Office of Education's Instructional Television Station, I.T.V. (1994; 1996)
- San Diego Environmental Health Coalition
Navy Nuclear Ship Basing Study (1996)
Safe Substitutes Survey, San Diego County (1992)
Household Hazardous Wastes Survey, City of Coronado (1992)
- San Diego Fluoridation Coalition
Attitudes Regarding Fluoridation (1997)
- The San Diego Union-Tribune and NBC 7/39 Television
Library Special Election Study (1999)
1998 General Election Study (1998)
Proposition C Padres Ballpark Study (1998)
Health Care Study - Survey of Physicians (1997)
Health Care Study - Survey of Adult San Diego County Residents (1997)
Jack Murphy Stadium Expansion Controversy (1997)
Presidential/General Election Studies (1996)
California Primary Election Study (1996)
- Scripps Memorial Hospitals
HealthPlus55 Survey (1991; 1993)
- South Bay Union Elementary School District
Community Views of South Bay Union Elementary School District (1994)

Parent Views of South Bay Union Elementary School District (1994)
The Stevens Cancer Center - Scripps Memorial Hospitals
Sun Exposure Index Awareness Survey (1996)
Sweetwater Union High School District
Community Survey Regarding Graduation and Promotion Requirements (1999)
Community Views of Sweetwater Union High School District (1995; 1996)
Parent Views of Sweetwater Union High School District (1995; 1996)
Twenty Second District Agricultural Association, State of California
Del Mar Fair Regional Study (1993; 1994)
Del Mar Fair Attendees Survey (1992)
UCSD School of Medicine, Dept. of Family and Preventive Medicine
"Por La Vida" Intervention Model in Cancer Education (1995-2000)
Interstitial Cystitis Prevalence (1993)
U.S. National Park Service
National Archaeological Database Project (1991)
U.S. Navy Health Research Center
The Seabee Health Survey (1999)
U.S. Navy Special Warfare Group
Navy SEALS Foreign Language Acquisition

SCOPE OF SERVICES

As indicated in the previous section, the Scope of Services that is presented below outlines the methodology to be used for each survey. Where there is a difference between them, this difference will be clearly elaborated.

TASK 1: FINALIZE PROJECT WORK PROGRAM AND DEVELOP MANAGEMENT PLAN

Subtask 1.1: Kickoff Meeting with the OTAY WATER DISTRICT Project Team

Rea & Parker Research will meet with the Otay Water District Project Manager and other Otay Water District team members to: 1) review project objectives; 2) review the preliminary work program and make revisions recommended by the Otay Water District; 3) clarify and address any outstanding technical issues; 4) establish formal lines of communication between the Otay Water District and Rea & Parker Research; 5) determine content and format of routine progress reports; and 6) discussion of draft survey questions submitted by the Authority.

At this initial project (kick-off) meeting Rea & Parker Research will be interested in discussing the final use of the data in order to ensure that it is collected to achieve the overall objectives of the Otay Water District.

One of the primary purposes of the initial meeting is to guarantee that all parties fully understand all decisions and analyses that will be undertaken using the final data. Rea & Parker Research then will suggest which charts, tables, and analytical documentation would contribute to making these decisions and analyses and will design the specifics of the research process accordingly. This approach ensures that Otay Water District will receive from Rea & Parker Research actionable findings and recommendations that address all research objectives.

There will be at least 5 meetings between Rea & Parker Research and Otay Water District, of which this is to be the first. Subsequent meetings will include submittal of resulting draft questions for both surveys prepared by Rea & Parker Research and preliminary review of findings for each as a prelude to final report writing.

Subtask 1.1 Deliverable: (1) Conduct project kick-off meeting and provide written summary for Otay Water District Project Manager review within three days of the meeting

Subtask 1.2: Complete formal work plan within 5 days of initial meeting

Within 5 calendar days of the initial project meeting, Rea & Parker Research will make agreed upon changes to the work program (tasks, subtasks, and deliverables) and submit to Otay Water District Project Manager for review.

Subtask 1.2 Deliverables: (1) Final work program (project objectives tasks, subtasks, and deliverables)

Subtask 1.3: Review Background Materials

As detailed in the qualifications section of this proposal, Rea & Parker Research is extensively familiar with public and private market research, market segmentation, customer satisfaction, and attitude and awareness analyses, and, in particular, within the water utilities industry.

Rea & Parker Research will bring to bear upon the tasks at hand this knowledge and practical experience, beginning with a detailed review of the previous public awareness study/studies.

Subtask 1.3 Deliverable: (1) Technical Memorandum outlining key ideas and understanding of the project derived from these background materials.

Subtask 1.4: Sampling Plan for Public Awareness/Public Opinion Research

It has been initially suggested by the Otay Water District that one random sample telephone survey with an overall sample size of 300 qualified residents of the district (age 18 or older/suggestion: also screen for one year residence within district)—simply referred to as “qualified residents” for the balance of this proposal) be conducted (margin of error +/- 5.7% @ 95% confidence), the objective of which will be to determine public awareness and public opinions of water issues. A second sample survey is to be conducted with an overall sample size of 200 is to be conducted among customers who have contacted the Otay Water District within the past 6 months. Assuming approximately 15% of customers have been in contact with the District in this timeframe (based upon 2005 survey showing 19% in 12 months), the 200 person sample would represent a margin of error of +/- 6.9%. These samples will be randomly drawn from clean, current, and comprehensive lists of all Otay Water District customers and customers who have contacted the District within the most recent 6 months. These lists will be provided to Rea & Parker Research by the Otay Water District.

Subtask 1.4 Deliverable: Within 7 days of the execution of an Agreement and Project Kick-Off between Rea & Parker Research and Otay Water District, formal sampling plans will be prepared by Rea & Parker Research.

TASK 2: DESIGN SURVEY INSTRUMENTS

Subtask 2.1: Design Survey Instrument for Qualified Residents

Richard Parker, Louis Rea, and Douglas Coe have strong professional and academic-related backgrounds in survey design, including the publication of a very successful textbook on the subject, *Designing and Conducting Survey Research* (authors: Richard Parker and Louis Rea), in 1992, 1997, and 2005.

Rea & Parker Research will work with Otay Water District staff in preparing the survey instruments. Rea & Parker Research is very conversant in all forms of survey instruments, including reasons for success and drawbacks. Rea & Parker Research will utilize this knowledge working with Otay Water District staff to prepare instruments that will facilitate computerization and will capitalize upon the key elements and findings from the baseline survey. The

questionnaire will include questions sufficient to compare the results of the baseline survey with the current ones while simultaneously improving upon the previous survey in terms of information derived. To the maximum feasible extent, Rea & Parker Research will identify the methods necessary to measure changes from the baseline survey and to identify the causes of such changes.

Otay Water District and Rea & Parker Research are seeking to gain information from qualified district residents in order to specifically identify knowledge and opinions concerning:

Survey I: 300 customers of the Otay Water District will be randomly sample surveyed.

The primary areas of interest are:

- Overall customer satisfaction
- Awareness of rates
- Awareness of formal/written communications
- Awareness of conservation activities/programs
- Awareness of water recycling activities
- Attitudes toward conservation
- Concerns about water supply
- Quality of water supply
- Reliability of supply
- Awareness of sewer operations
- Demographic measures
- Areas of interest concerning water or district issues (open end)
- Other areas as may occur in planning discussions

Survey II: 200 randomly selected customers of Otay Water District who have contacted the District for information and/or customer service during the most recent 6 months.

The primary areas of interest are:

- Call Center interaction—specific instances
 - Courtesy of staff
 - Clarity and accuracy of responses from staff
 - Level of knowledge displayed by Call Center staff
 - Experience with field staff
 - Quality of service received
 - Overall satisfaction with service received
 - Use of online services
 - Quality of online services
 - Demographic measures
- Other areas that may occur in planning discussions, including the possibility of:
- Knowledge about sources of water
 - Environmental considerations
 - Statewide water issues
 - Major sources, uses and users of water in San Diego County
 - Drinking water safety issues
 - Desalination
 - Willingness to pay

Rea & Parker Research will prepare draft questionnaires, according to the above criteria, that will entail approximately 10-12 of interview time and submit them to the Otay Water District Project Manager for tentative approval.

A minimum of five meetings will be held among Rea & Parker Research and Otay Water District, including the Kick-Off meeting, in order to finalize the survey instrument, procedures, and final report format and guidelines.

Subtask 2.1 Deliverable (1) Draft copies of Otay Water District preliminary telephone surveys within 21 days of execution of Agreement

Subtask 2.2: Pre-Test Survey Instrument and Procedures and Recommend Changes

Rea & Parker Research will prepare draft questionnaires according to the above criteria and submit them to Otay Water District staff for tentative approval. Once each draft survey instrument is approved, Rea & Parker Research will pre-test the survey instruments in the field among qualified customers. Rea & Parker Research will translate the surveys into Spanish and conduct additional pretests. The minimum sample sizes for the pretests are to be 20.

During the pre-testing phase of the project, Rea & Parker Research will ensure that the survey instruments and data collection procedures gather statistically valid knowledge, behavioral, and demographic data. The questionnaire design process and pre-test will seek to eliminate difficult levels of wording, non-specific and vague words and phrases, multi-purpose questions, inappropriate emphasis, and biasing words and phrases.

As part of this phase, Rea & Parker Research will 1) refine interview procedures and logistics; 2) highlight potential changes to question wording, sequencing, and formatting. Rea & Parker Research will make recommendations to improve the survey instrument or procedures based upon the results of the pre-test; 3) analyze survey length and respondent willingness to participate; 4) compare alternative approaches to gathering specific data needs; and 5) identify unexpected responses and respondent behavior. The ultimate objective is a clear, comprehensive, and realistically implementable survey instrument.

An Otay Water District representative will attend the pretest session in order to help assess the achievement of these objectives if it so chooses. In the alternative, Rea & Parker Research will also have the capability to allow Otay Water District personnel to monitor calls, at the Otay Water District discretion, from a remote location.

Rea & Parker Research uses the CATI (Computer Aided Telephone Interviewing) system for telephone interviewing (Sawtooth WinCATI, CI3). Telephone survey research facilities for Rea & Parker Research consist of 30 interviewing stations, equipped with a state-of-the-art CATI system. CATI increases interviewing accuracy, quality, and performance. CATI selects and dials telephone numbers from a randomly drawn sample of telephone numbers, tracks and tallies outcomes, captures response data, processes complex question skip patterns automatically, schedules and tracks call-back appointments, and screens invalid response codes.

Subtask 2.2 Deliverable: (1) Rea & Parker Research will provide a technical memorandum documenting results of pre-test and recommending changes, if appropriate.

TASK 3: CONDUCT TELEPHONE SURVEYS AMONG QUALIFIED CUSTOMERS

Subtask 3.1: Select Representative Sample of Residents

Rea & Parker Research will use random statistical sampling methods to obtain final samples of at least 300 qualified residents/customers in the Otay Water District region using random telephone numbers that have been cleaned and made current for the general survey (Survey I) and 200 qualified customers for the customer service survey (Survey II).

Subtask 3.1 Deliverable: (1) Technical memorandum detailing methods used to select telephone samples and validating that samples are representative of customer base.

Subtask 3.2: Conduct the Telephone Surveys

Once the final telephone survey instruments have been tested and approved, Rea & Parker Research will complete a minimum of 300 telephone surveys among qualified customers of the District and another 200 telephone surveys among customers who have contacted the District in past 6 months. Both of these surveys will be completed within a period not to exceed one month after survey approval by the Otay Water District.

Responses will be input directly into the computer data base, and these data be provided in frequency distributions to the Otay Water District Project Manager and staff by Rea & Parker Research.

Interviewers are selected for each project from a pool of approximately 50 experienced interviewers. Each interviewer is trained in proper techniques, obtaining respondent participation, accurately recording responses, and is further trained in the importance of confidentiality. A minimum of four callback attempts is made in the case of a busy signal, an unanswered phone, or an answering machine. These callbacks are made on different days and at different times to maximize the chance of reaching an eligible respondent. All telephone interviews are conducted with a supervisor present at all times. Interviews are normally conducted from 4:00 to 9:00 p.m. on weekdays, and from 12:00 to 5:00 p.m. on Saturdays and Sundays.

Rea & Parker Research employs bilingual (Spanish/English) and (Vietnamese/English) interviewers because of the significant proportion of Latinos and Vietnamese residing within California. Bilingual Tagalog, Chinese, Mung, and Korean interviewers are also employed, as necessary.

Quality control procedures are employed throughout the interviewing and data reduction phases. Custom data entry screens are created that filter valid code ranges and accommodate automatic skip and fill patterns. Interviews in progress are selectively and unobtrusively monitored by supervisors using a special digital telephone system. Ten percent of completed interviews that are not directly monitored are selected for verification by recontacting the respondents. Rea & Parker Research will also have the capability to allow Otay Water District personnel to monitor calls, at the Otay Water District discretion, from a remote location.

- Subtask 3.2 Deliverables:*
- (1) *“Raw” frequencies from the telephone survey*
 - (2) *Final report on disposition of all call attempts and sample characteristics*

TASK 4: CODE, ANALYZE, AND WEIGHT SURVEY DATA

Subtask 4.1: Code all numeric and string survey data

Survey questions will be pre-coded into pre-defined categories for ease of data input and will be post-coded into these or other numerically defined categories when responses require such additional consideration. Survey data will be statistically compiled for analysis by the Statistical Package for the Social Sciences (SPSS) software. Each survey will be entered as its own individual record after it is thoroughly checked for inconsistent entries and omissions of key survey questions. For the purposes of this study, a valid survey will be one that is defined as “completed”—suggested to be at least 90% complete (with the exception of screened/filtered questions) and including all questions identified by Otay Water District and Rea & Parker Research as critical to the study. The data will be input in such a manner as to assure Otay Water District that invalid responses will be identified and corrected. Rea & Parker Research will provide to Otay Water District a detailed list of all codes and coding instructions in addition to the survey data in the electronic formats discussed above.

Rea & Parker Research will code all categorical data using numeric coding to facilitate subsequent analyses using SPSS. Rea & Parker Research will code any (non-address) open-ended responses to a given question into a discrete set of categories. Rea & Parker Research will input address and other alphabetic (string) data in a readable format.

- Subtask 4.1 Deliverables:*
- (1) *“Cleaned”, fully coded data set within 7 days of fieldwork completion.*

Subtask 4.2: Weight/Expand Survey Data

The data collected as part of the surveys may be expanded to the universe from which the samples were drawn, depending upon the ultimate sample population distribution and analytical requirements agreed upon by Rea & Parker Research and Otay Water District. The weights will consist of a determination of the proportionate sample size per characteristic chosen for weighting, divided by the actual sample size achieved per characteristic and will be applied to the unweighted data in SPSS.

- Subtask 4.2 Deliverable:*
- (1) *Technical memorandum documenting data expansion methods used to create sample weights including the actual sample weights that were developed*

Subtask 4.3: Analyze Data from Telephone Surveys

Rea & Parker Research will analyze the data compiled during the telephone surveys. Rea & Parker Research will consider the appropriateness of regression analysis, factor analysis, various statistical significance procedures (Chi-Square, Independent Samples t-test, Analysis of Variance), and measures of association to model these determinants and draw defensible, policy-oriented conclusions about the knowledge, opinions, and behaviors of District residents.

Initial analysis of the data will be completed within 20 working days of survey interview completion. Analysis will continue throughout report preparation as additional issues arise from the reporting process itself or from questions/requests from the Otay Water District.

Subtask 4.3 Deliverable: (1) Technical memorandum documenting methods used to analyze the survey data within 20 working days of completion of interviews.

TASK 5: PREPARE FINAL REPORTS OF FINDINGS

Subtask 5.1: Prepare Final Reports Summarizing Opinions, Satisfaction, Water-Related Behavior, Demographics, and Other Characteristics

Commencing simultaneously with data analysis, Rea & Parker Research will begin preparation of the final reports concerning the telephone surveys that will combine, contrast, and compare such information as demographics, awareness, behavior, and opinions for the samples of qualified customers. The data are to be weighted and presented in the form of frequency distributions, crosstabulations, factor analyses, regression and correlation. Key issues and characteristics that require attention AND that can significantly enhance Otay Water District policies will be identified through the use of the above referenced techniques. "Stand-alone" executive summaries will also be included. Spanish language interviews will be separately tabulated and combined into the overall data presentations, including copies of both the Spanish and English language versions of the surveys.

The analysis will include not only basic crosstabulations but also segmentation analysis that will identify, with specificity, those groups that represent the greatest deviations from the norm. The reports will include color graphical presentations of the findings. A tabulation of the outcome of all calls made during the course of both surveys (number of refusals, business and disconnected numbers, numbers that were busy or not answered after four attempts and language and age problems) shall be part of the overall report to the Otay Water District.

Initially, draft reports for each survey will be prepared and submitted for review. The draft reports will include all components of the final reports including full methodological section, description of survey administration, and an elaboration of analytical techniques utilized and findings resultant therefrom. The project team will review the draft reports and will suggest edits to Rea & Parker Research.

Rea & Parker Research will incorporate the suggestions and produce final reports that will include the color graphical components. Rea & Parker Research will provide ten (10) bound, "hard" copies of the report and frequency tables to the Otay Water District, and electronic copies of the reports and data, using Microsoft Word/Excel and SPSS for Windows formats.

Subtask 5.1 Deliverable: (1) Ten copies of the completed research report and frequency tables will be submitted. plus 1 electronic copy including data.

Subtask 5.2: Delivery of Data Sets and Key Crosstabulations

Once the data sets have been coded, weighted, and verified, Rea & Parker Research will recommend banner points to be used in preparing crosstabulations in SPSS format. Rea & Parker

Research will provide data dictionaries and glossaries, coding handbooks, field configurations, and file layouts for the data set. The District may also request several data printouts, with various questions crosstabulated by other items

- Subtask 5.2 Deliverable:*
- (1) *SPSS case file containing telephone survey results*
 - (2) *Requested copies of data and agreed upon crosstabulations of survey questions*

Subtask 5.3: Presentation of Survey Findings

Richard A. Parker, Ph.D. will be available to personally make 3 formal presentations of the findings and recommendations from the surveys to the Otay Water District board, management, and other interested parties using PowerPoint visual presentation aids and written handout materials derived from the PowerPoint slides.

- Subtask 5.3 Deliverables:*
- (1) *PowerPoint presentation aids in electronic and "hard copy" formats*
 - (2) *In-person presentations by Dr. Richard A. Parker*

PROPOSED PROJECT SCHEDULE

Task/Subtask	Commencement Date	Completion Date
1. Kick-Off Meeting	Week 1	Week 1
Formal Work Plan	Week 1	Week 1
Review Background Materials	Week 1	Week 1
Sampling Plans	Week 1	Week 1
2. Design Surveys (incl. approval)	Week 1	Week 3
Pretest Surveys	Week 4	Week 4
3. Select Telephone Samples	Week 3	Week 4
Conduct Telephone Surveys	Week 4	Week 8
4. Code Survey Data	Week 5	Week 9
Weight Survey Data	Week 9	Week 9
Analyze Survey Data	Week 9	Week 11
5. Draft Reports	Week 9	Week 12
Final Reports	Week 13	Week 14
Presentations	Week 15	Week 16

COST AND PRICE PROPOSAL

Rea & Parker Research proposes to perform all tasks described in the Scope of Work (questionnaire design, sample design, data input, analysis, presentation of findings and various consultations) for each survey for full, fixed prices of **\$15,000 for Survey I** (general) and **\$12,500 for Survey II** (customer service). This price includes 10-12 minute telephone surveys with interviews of 300 and 200 qualified customers and customer service contacts, respectively, of the Otay Water District (+/-5.7% @ 95% confidence and +/- 6.9% @ 95% confidence, respectively), including Spanish version.

COMMITMENT FROM REA & PARKER RESEARCH

Rea & Parker Research is committed to keeping the lines of communication open as the project moves forward. To that end, Rea & Parker Research will provide the Otay Water District Project Manager with frequent progress reports. By using key senior staff members to implement the tasks described above, Rea & Parker Research promises to provide consistent and efficient consulting services to its clients in general, and to the Otay Water District, in particular, for this project.



MEMORANDUM



TO: Marketing Research Vendors

FROM: Armando Buelna, Communications Officer

SUBJ: Invitation to Bid - Survey Research

File No.

Date 5/23/06

The Otay Water District (the district) wishes to conduct two statistically reliable telephone surveys of residential customers. The purpose of the surveys will be to build upon baseline data from a 2005 customer survey.

Survey I - N=300, to be selected from a random sample of customers. The primary areas of interest are:

- Overall customer satisfaction
- Awareness of rates
- Awareness of formal/written communications
- Awareness of conservation activities/programs
- Awareness of water recycling activities
- Concerns about water supply
- Reliability of service
- Reliability of supply
- Awareness of sewer operations
- Demographic measures

Survey II - N=200, selected from customers who have contacted the within the last 6 months. Areas of interest include:

- Specific Call Center interaction
- Courtesy of staff
- Clarity and accuracy of responses from staff
- Knowledge of Call Center staff
- Experience with field staff
- Quality of service received
- Overall satisfaction with service received
- Use of online services
- Quality of online services

The successful vendor will be responsible for questionnaire development, fieldwork, data tabulation, and presentation of topline results.

The vendor should expect to consult with the district regularly on the questionnaire development and be prepared to provide up to three site presentations of the results.

Bids should include costs for all services and fieldwork (including translating surveys into Spanish and conducting some of the survey to Spanish speaking customers) and any and all miscellaneous expenses.

The district would like 10 copies of both the data and the report.

The district may also request several data printouts with various questions cross-tabbed by other items.

The district can provide names, telephone numbers, zip codes of survey respondents. All data and questionnaires should be returned to the district upon completion of the survey.

Please submit your proposals by June 5, 2006, via mail or e-mail to:

Armando Buelna, Communications Officer
Otay Water District
2554 Sweetwater Springs Blvd.
Spring Valley, CA 91978
abuelna@otaywater.gov

Questions about this project may be directed to abuelna@otaywater.gov or (619) 670-2256.

SUMMARY OF PROPOSAL RANKINGS BY PANEL MEMBERS
[2006 Customer Survey]

		WRITTEN						TOTAL SCORE	AVERAGE SCORE	Comments
		Qualifications, experience of Consultant's assigned personnel	Experience relevant to type of project being considered	Proposed method to accomplish work	Knowledge of jurisdictional agencies or local area	Proposed Fee	Completeness, addressed requested information			
SCORE		15	20	15	15	10	15	10	100	
Godbe Research	<i>Geoff Stevens</i>	9	10	12	7	5	11	6	60	77 A former MWD analyst would be co-project manager, but has limited water experience. Good level of analysis.
	<i>Elaine Henderson</i>	13	15	13	13	5	15	10	84	
	<i>Armando Buelna</i>	13	18	13	13	5	14	10	86	
Luth Research	<i>Geoff Stevens</i>	8	14	12	10	6	9	9	68	49 Vague presentation. Panel scores were low for this reason.
	<i>Elaine Henderson</i>	1	3	8	3	6	1	1	23	
	<i>Armando Buelna</i>	10	10	10	7	5	6	8	56	
Rea & Parker	<i>Geoff Stevens</i>	12	18	13	14	8	12	9	86	88 Good experience working working with them. Good product.
	<i>Elaine Henderson</i>	13	18	15	15	8	13	6	88	
	<i>Armando Buelna</i>	15	18	13	14	8	14	8	90	
Zogby Int.	<i>Geoff Stevens</i>	8	12	10	8	8	12	8	66	65 Not much local exp. Great reputation/expertise. Onsite meetings not addressed.
	<i>Elaine Henderson</i>	10	10	13	5	8	8	1	55	
	<i>Armando Buelna</i>	15	15	10	8	8	10	9	75	

AGENDA ITEM 5

There is no staff report for Item 5.
A verbal update will be provided.