

Cover Letter

March 26, 2024

George Rodericks
City Manager's Office
80 Fair Oaks Lane
Atherton, CA 94027

Subject: Community Survey

Authorized Representative:

Adam Probolsky, President
Probolsky Research
100 Pine Street Suite 1250
San Francisco, CA 94111
adamp@probolskyresearch.com
Telephone: 415-870-8150

George:

Thank you for the opportunity to offer our research services to the Town of Atherton. We look forward to conducting a statistically valid community survey in early 2025. We welcome the opportunity to work with the Town to conduct future surveys on two-year cycles.

Having conducted thousands of similar projects for local governments nationwide and throughout California, we have unmatched experience identifying important policy options based on research and analyses. Our research will identify community needs and collect feedback from across the Town, including any historically marginalized communities. Some relevant clients include the cities of Arvada (CO), Brisbane, Dunwoody (GA), Falls Church (VA), Half Moon Bay, Hampton (VA), Grover Beach, Napa, and Rochester Hills (MI) and the counties of Arlington (VA), Dakota (MN), Ottawa (MI), Richland (SC), Santa Clara Valley Water District, Santa Cruz, and Wake (NC).

We look forward to working with staff on this project. Our specific methodological recommendations will help us achieve an inclusive representation of the Town's residents. We will develop an appropriate survey process and methodology to measure community input and sentiment on various topics, create and administer the survey after obtaining committee input on questions, and tabulate survey results. We will track findings over time to help Town measure progress as well as benchmark data to help Town understand where you stand compared to other similar-situated communities in California.

We are a team of communication, data, economic, and public policy experts – unique for a research firm, but a hugely important part of our ability to measure general attitude of residents toward Town services and programs, determine resident priorities and areas of concern, and receive feedback.

We bring the understanding of diverse communities to our work and the language capabilities that ensure that our research is more accurate than any other firm can provide. To ensure inclusivity and representation of all voices, and to limit communication barriers, we will conduct our research in **English and Spanish** – other languages are available. Our in-house equity officer will help ensure the research process is sensitive to ADA and diversity, equity, and inclusion (DEI) issues in design and distribution methods.

You can count on me to be available, as much as requested to be available for meetings and make presentations – **in-person** or virtually to Town officials. We are looking forward to working together on this important project and helping build the roadmap to your strategic goals and priorities.

We acknowledge that a contract and insurance will be provided in accordance with Town requirements.

Sincerely,



Adam Probolsky, President



Response to the Scope of Services

Company Profile

Established in 1992 and organized as a Limited Liability Corporation, Probolsky Research LLC specializes in market and opinion research. We are a woman and Latina-owned firm; we are multi-lingual. Probolsky Research is a Certified California Small Business Enterprise (ID 1758330).

Probolsky Research conducts research in government, business, non-profit, election, and association practice areas. We are traditional market researchers and pollsters who are constantly innovating, without compromising on quality. We connect our clients with the necessary individuals to best maximize their research initiatives for valuable insights.

You will always work with our senior team at the executive and director level, all of whom have research related degrees and expertise.

Probolsky Research understands community and municipal needs: We have acted as pollster and strategic advisor on hundreds of local, county, and statewide government agencies – each community has its own unique constituency. We have conducted more than 1,000 surveys for government clients.

Our active engagement in organizations such as the American Association of Public Opinion Research, Insights Association and American Association of Political Consultants ensures that we have the latest perspectives on outreach and research. Additionally, Probolsky Research has partnered with the Institute of Local Government.

Services

Our research services include:

- Telephone surveys
- Mail surveys
- Online surveys
- Multi-mode surveys
- Individual in-depth interviews (IDIs)
- Focus groups
- Field Focus Groups™
- Community meetings
- Engagement
- Community Discussion Boards

Client Service Philosophy

We include unlimited meetings and presentation time. We welcome the chance to meet **in-person** and make presentations as directed, without limitations.

We believe in regular and open communication and a collaborative working relationship. We know that staff is busy, so we limit the need for staff time and make ourselves available on your schedule.

We try not to take up the time of Town staff. Apart from a preliminary data download and questionnaire edits, we do not see the need for the Town to provide any additional services for us to complete our work. However, we always welcome more involvement from staff throughout the research process. We love working collaboratively. We do not have any suggested modification to the Town's scope of services.

We provide a truly individualized method for our research. We do not believe in a one-size-fits-all approach. This means that we provide *custom* research projects to meet the Town's individual needs. We work collaboratively with you to get the most out of your research with a personalized approach that will exceed your expectations and provide a tailored experience that larger firms do not provide. All our work will be custom to the Town while also receiving the benefit of our deep reservoir of comparative data.



Project Initiation

We begin every research project by understanding how our client got to this moment in time. We are aware the Town recently completed its most significant facilities upgrade in over 50 years – the new Town Center and that capital project focus now shifts to much needed capital infrastructure priorities. We are also aware that the Town would like to engage the community on a broad range of community feedback soliciting input for the survey content from the Town's various community committees and planning commission – community input is central to these processes – input from the community will help the Town better understand the community, inform budget priorities, and identify infrastructure needs. We have already reviewed resident demographics and other relevant data.

You cannot overwhelm us with background information and data. We expect to pour through staff reports, financial reports, past polling, news clips, and social media posts talking about the Town. We believe this is an essential part of providing best practice approaches to the Town that enhance efficiency and effectiveness. There is nothing peripheral about our work. We are passionate about helping local agencies improve their connection with their constituents.

Town of Atherton Resident Analysis

We have conducted an initial analysis of Town adult residents based on Census data. Should the Town prefer that we exclusively survey voters, that is an option.

Gender/Age demographics	Percentage	Ethnicity/Home Type demographics	Percentage
Gender (Male)	50%	Ethnicity (Latino/Hispanic)	9%
Gender (Female)	50%	Ethnicity (White/Caucasian)	67%
Age (18-29)	24%	Ethnicity (Black/African American)	1%
Age (30-39)	8%	Ethnicity (Asian/Pacific Islander)	20%
Age (40-49)	11%	Ethnicity (Other/Multi-racial)	3%
Age (50-64)	27%	Home Type (Owner)	62%
Age (65+)	30%	Home Type (Renter)	38%

Goals

Specifically, we will:

- **Host** an initial meeting to kick off the process with Town staff and committee
- **Create** survey instruments, work plans and schedules, in consultation with Town staff
- **Collaborate** with Town staff to determine the most cost-effective, reasonable, and productive survey methodology – providing recommendations on the number of survey questions, suggested content and questions, and duration of survey to maximize engagement results
- **Provide** recommendations on whether to conduct a single survey or two surveys
- **Develop** survey questions to gauge community perceptions on quality of life, personal and property crime, traffic, environmental safety, sense of community, important issues facing the Town, contact with the Town and sources of information, and review demographic information
- **Recommend** appropriate methodologies and strategies for providing the best data samples, objective results, and valid findings, including one or more mediums (i.e., phone, mail, online)
- **Conduct** the survey(s) ideally around winter/spring 2025, but no later than April 2025
- **Provide** a draft and final report of the survey's results in both detailed and summarized form, including any conclusions or recommendations drawn from the findings
- **Hold** a meeting with Town staff and committee to review the preliminary results and data
- **Present** the results to Town staff, City Council, and other key stakeholders identified by the Town

Research Design

We begin every research project by meeting with Town staff to develop the questions the research needs to answer. We undergo extensive review of primary and secondary data sources including past research, comparable studies, staff reports, financial reports, news clips and articles, social media posts and any other relevant data to inform our research. Through this deep dive approach, we develop the necessary historical context to inform and identify collaboratively with the Town the objectives, goals, and priorities for the community survey.

Using the information gleaned from meetings, past research, background information provided by staff, and our own open-source preliminary research, we will make recommendations for the number of questions, suggested content and questions, and duration of survey to maximize engagement results.

We are always available to our clients. We will continually keep the Town informed of progress with meetings and updates. We will accommodate any meeting or call schedule staff requests. As an example, this might include daily emails, weekly calls, and monthly meetings. At least one project team member will be available 24/7 for urgent matters.

Following meetings or conference calls in which we discuss proposed modifications, we will incorporate agreed-upon changes. We recognize that this may require several rounds of revisions. Once we produce the final draft, we will submit the questionnaire for final approval before the survey is translated and fielded. Once the questionnaire has been finalized, we professionally translate the questionnaire into the languages decided on, create phonetic pronunciations of names for telephone responses, and establish proportions to match resident demographics and geographic location within the Town, and program the proportions, along with the survey, into our software utilized for telephone and online responses.

After programming, the survey is tested for logic and presentation. Once this initial testing has been completed, we conduct a soft launch, also known as a pre-test, of the survey and collect 20 completed interviews. Once the pre-test collection period is complete, our team meets to go over the results and address any problem areas that come to light, adjusting the survey as necessary. We conduct quality control checks on a regular basis throughout the survey process. We check for correct skip patterns, randomization and rotation, and completeness of responses. We also actively monitor to ensure that respondents will match the demographic make-up of Town residents.

Research Process and Community Outreach

Prior to launching the survey, we will provide the Town with a research process memo that explains the key points, timing, and structure of the survey. This document allows the Town to conduct better outreach to residents, define goals, and increase overall participation when conducting outreach before administering the survey. You can view an example research process memo by following [this link](#). We will help with social media posts, press releases, and other public-facing outreach as requested.

Cyber Security, Confidentiality, & Certifications

We take data integrity and confidentiality seriously. All client materials are hosted in a secure digital cloud environment. We use 256-bit Advanced Encryption Security to keep your data secure. This is the same level of encryption used by the U.S. Government. *Our data is stored on U.S. based computers and cloud services. Research is only released per staff's direction.*

We use Box for content management. This cloud-based, encrypted system allows us to gather data and manage projects seamlessly and securely.

We have multiple team members who hold certifications in the protection of human subjects in research from the Collaborative Institutional Training Initiative (CITI). CITI is the leading provider of research ethics and compliance education, utilized by academic, medical, and social science researchers across the United States and globally.



Conduct Research

Statistically Valid Multi-mode, Multi-lingual Survey Approach

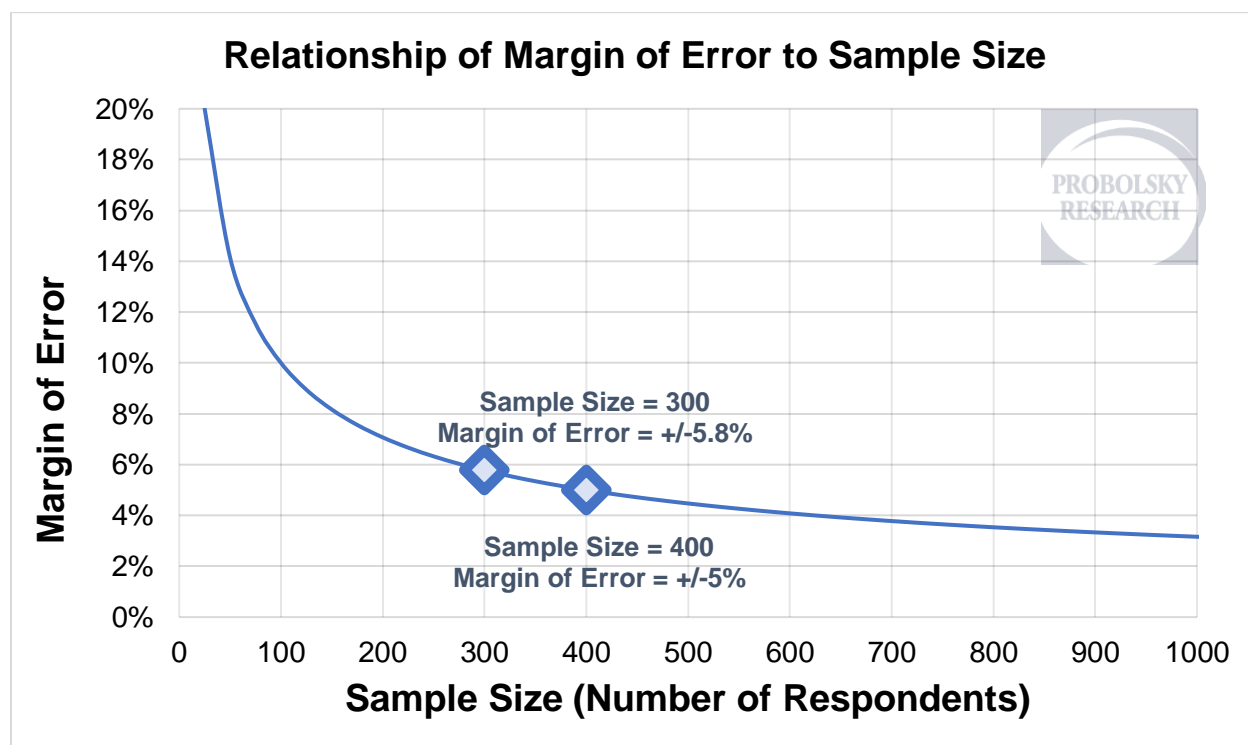
We use a multi-mode methodology for all surveys, meaning that we will conduct the survey by several modes that may include telephone, online via our secure digital platform through email, and text message, as well as other options like mail. This multi-mode approach maximizes the accuracy and reach of the research, increases participation rates, and minimizes response bias. We look forward to a robust discussion with Town staff to determine the ideal survey methodology.

Participants can choose their preferred language at the onset of their survey experience. Online participants can complete the survey from any device: computer, tablet, or mobile phone. Telephone participants use their landline or mobile phone to complete the survey.

Our statistically valid multi-mode, multi-lingual approach is the most advantageous to the Town because it will provide the most accurate and inclusive survey results.

Suggested Sample Size

A sample size of 300 residents is robust and will yield a $\pm 5.8\%$ margin of error at a 95% level of confidence. The statistically representative, random sample will allow for statistically reliable comparisons among all subgroups of the Town's population (e.g., by demographic and geographic variables). We have also provided an option for 400 completed surveys.



Sample Stratification

The statistically valid sample file of Town of Atherton residents will be secured by Probolsky Research, at our expense, from consumer and government databases that includes addresses, emails, and phone numbers – (landlines and mobile phones) and is inclusive of all residents, both demographically and geographically.

Unique to Probolsky Research: We match the demographics of Town of Atherton residents. This means we capture real responses of the right number of each gender, age group, ethnicity, etc.

Analysis and Reporting

Once our data collection phase is complete, we begin a process of comprehensive data analysis and reporting to deliver accurate, thorough, and actionable data insights to the Town.

Data Analysis

We complete comprehensive statistical analyses of the research results, utilizing software programs, including IBM SPSS and R to conduct deep statistical testing, such as multiple regression analysis. Both qualitative and quantitative data will be analyzed in a scientifically valid manner. This helps us discover and present statistically significant results – beyond the broad opinions – and understand the specific factors that contribute to attitudes and beliefs of residents. Such analyses are crucial in identifying gaps in public perception and awareness. Once we have run all analyses on results, cross tabulations are developed, graphics are generated, and other elements of the report are prepared.

Verbatim Responses to Open-Ended Questions

For open-ended questions, we code the responses into categories. Once these categorizations have been quantified, we take our analysis a step further. We analyze the tone and word choices and overlay demographic data for each response. This demographic overlay will provide the Town with a deep understanding of the opinions by age, ethnicity, gender, home type, income, language, etc. when reading their comments. Here is an example:

Female, 40-49, White/Caucasian, English, \$75,000- \$149,000, Homeowner

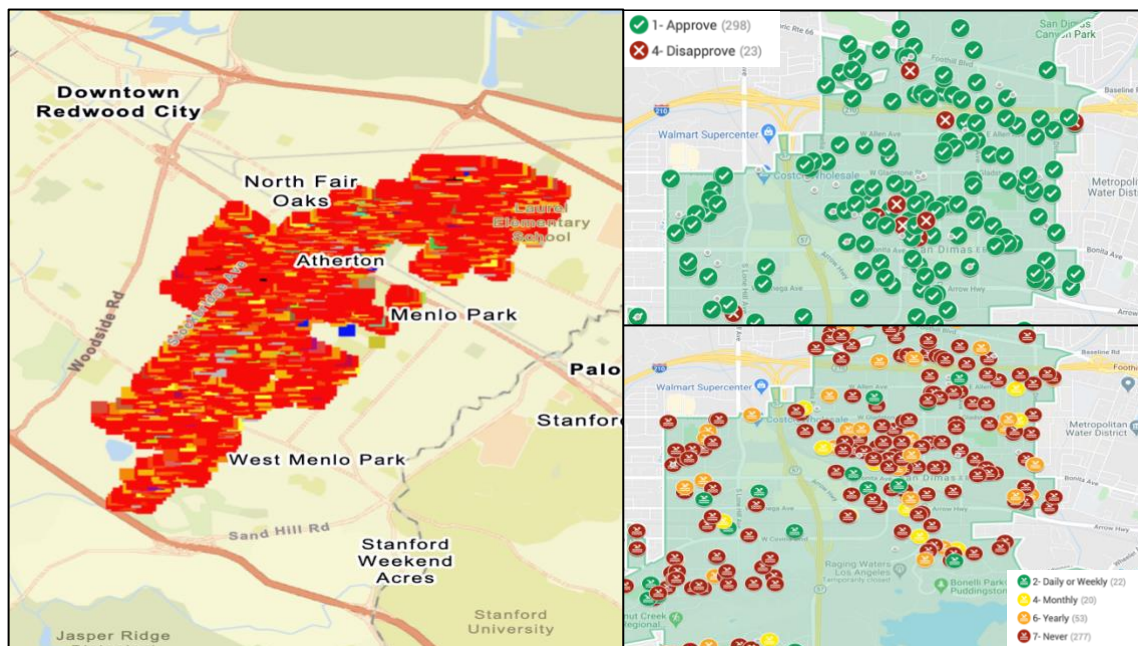
Question: What is the top issue facing your community?

Answer: *Activities for teens*

Example of a verbatim response with demographic overlay

Geospatial Mapping

Geospatial mapping of results is included. We will map survey respondents and their responses to different questions geographically. Our method ensures that individual respondents cannot be identified.



EXAMPLE: Town of Atherton residents mapped (left). Respondents mapped by geography and response to questions (San Dimas, CA- right).

Reporting

Our reporting is comprehensive and immediately usable by decision makers. Our reporting includes:

1. Draft survey (within 30 days of the survey's completion) and final report of the survey's results in both detailed and summarized form
2. Final report including survey background and results, methodological description, questionnaire results, survey top lines (displaying the aggregate percentages of responses to each question), cross-tabulations based on key demographic information, open-ended question responses with demographic overlay, analysis, conclusions, and recommendations
3. Results sent via PDF and hard copy (if requested)
4. Presentations (developed in collaboration with the Town) to Town staff and committee to review the preliminary results and data
5. Two presentations of survey results to Town staff, City Council, and other key stakeholders identified by the Town
6. In-person meetings, presentations, conference calls, and ongoing consulting

Benchmarking

We can also provide tracking and benchmarking of results to provide the Town with benchmarks of resident responses from previous research as well as provide benchmarking data of other similar agencies across the region, state, and nation. We will also provide benchmarking services over time through the duration of the contract to track progress.

Results Dashboards

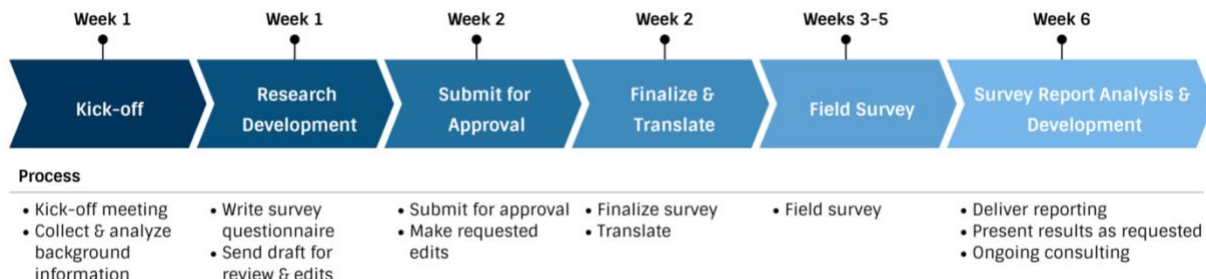
Probolsky Research offers interactive results dashboards to display key findings from our research at no additional cost. Each results dashboard is customized to meet the Town's needs and goals. Results dashboards allow users to filter data based on specific demographics. You can explore example dashboards by clicking [here](#) or [here](#). Dashboards can be used for publicly sharing data or for internal use.

Presentation and Ongoing Consulting

After completing our reports, we will send our deliverables to the Town for feedback and approval. We will then present our results to Town staff, City Council, and key stakeholders as identified by the Town. We are available to present findings virtually or in-person as requested. We welcome collaboration and to provide staff and outside consultants with insight on how to interpret, understand, and use our data.

Timeline

We can meet any timeline provided by the Town. We can start our work for the Town immediately. Below is an example timeline that can be easily modified.



Probolsky Research has the necessary capacity to deliver high-quality work within the Town's preset timeline and budget. In over thirty years of business, we have never initiated a change order; we have always delivered on time and within budget.

Qualifications of Key Personnel

All Probolsky Research team members are cross-trained, and every member of our team will be intimately familiar with the Town's project details. This ensures continuity, timeliness, and quality of work product. We conduct objective research and provide impartial analysis.

While Adam Probolsky will serve as project manager and the Town's point of contact, our entire team, with broad research experience with local government and specifically the planning process, will participate in projects for the Town. We are a medium-sized firm with a team of twelve – everyone working on this project possesses an understanding of design, implementation, and statistical analysis of community surveys.



DESIREE PROBOLSKY

Chief Executive Officer

Desiree has had more than a decade of branding, market research, public policy, and strategy development experience. She works with Probolsky Research's broad client base spanning business, government, and non-profit sectors. She oversees all staff and contract compliance. A credentialed English teacher and former legislative staffer for the California State Senate, Desiree earned her MBA from the University of California, Irvine, and her undergraduate degree at California State University, Fullerton.



ADAM PROBOLSKY

President and Project Manager

Adam is a 30-year veteran of polling and strategic advising who can explain complex research methodologies and findings to any audience. He has worked on thousands of national, state, and local research projects for governments, corporations, large institutions, and non-profits. He manages all aspects of Probolsky Research's projects including staff management and operations. Adam earned a Master's degree in Data Analytics and Visualization from the Maryland Institute College of Art and has been highly involved in the community. He has served as both a planning and finance commissioner for the City of Irvine, Waste Management Commissioner for Orange County, and College Foundation President for Irvine Valley College.



MICHAEL MCLAUGHLIN

Research Director

Michael has nearly a decade of experience in academic and public opinion research. He previously worked as an elections and economics researcher at Lehigh University. Michael is involved with all Probolsky Research projects, managing development of research instruments, geospatial mapping, sample construction, data analysis, and reporting. He received a BA in Economics from East Stroudsburg University, an MA in Economics from the University of Detroit Mercy, and an MA in Political Science from Lehigh University.



JOSHUA EMENEAGER

Senior Research Analyst

Josh is an experienced researcher with more than eight years of conducting quantitative and qualitative research, largely in the public policy space. For Probolsky Research projects he is responsible for the development of research instruments, recruiting of samples, fielding, and reporting. He specializes in questionnaire design. He received a BA in Political Science from the University of Texas, Austin, and an MA in International Relations from the University of Chicago.

**ALYCE BASIL, PH.D.***Senior Research Analyst*

Alyce has more than eight years of experience conducting research in a variety of projects including media, policy, and market research. Her work has been published in peer-reviewed journals and she has presented her work at national and regional conferences across the U.S. At Probolsky Research, she is responsible for instrument development, data analysis, focus group moderation and analysis, and reporting. She received a BS in Business Administration from Nichols College, an MA in Communication from Bryant University, and a Ph.D. in Communication from the University of Connecticut.

**MARGA BUGNOT***Research Assistant*

Marga has over 6 years of research experience, specializing in quantitative surveys for market research and a background in B2B research. At Probolsky Research, she plays a role in supporting Senior Research Analysts with various research tasks. She received her BA in Advertising and Public Relations from the Polytechnic University of the Philippines.

**ROSE REGIO***Research Assistant*

Rose has over eight years of experience in quantitative research and has worked with a diverse range of clients, primarily in the field of public policy. She specializes in data and analytics. At Probolsky Research, she aids senior researchers in conducting various aspects of the research projects. She received a BS in Statistics from the University of Philippines, Diliman.

**ALTON SMITH***Equity Officer*

Alton is a disabled Marine Corps Veteran who began his career in communications and later in health care. He received a certification in Diversity, Equity, and Inclusion from the University of South Florida. Alton previously served as a Calvary Baptist Church board member where he oversaw a group men's home and as a board member of the Community of Faith, a 501c3 non-profit that fed the homeless and helped place them in housing. At Probolsky Research he is involved in ensuring our research process is inclusive and culturally relevant.

References

City of Napa

Since 2014, we have conducted an annual, statistically valid survey among Napa residents to help policy makers understand community sentiments and be responsive to the community's needs and communication preferences. The surveys are also used as a management tool for staff to benchmark and improve. We included trend analysis on all reporting for the City of Napa, tracking how results have changed over time.

Contact: Jaina French, Community Relations Analyst**Address:** 1600 School First Street, Napa, CA 94559**Telephone:** 707-258-7843**Email:** jfrench@cityofnapa.org[Link to Results Presentation](#)[Link to Report on Results](#)

City of Half Moon Bay

We conducted statistically valid multi-mode (telephone and online) surveys among Half Moon Bay residents to determine their perspectives on public safety and law enforcement issues. Our research identified specific practices and procedures that residents are most concerned with.

Contact: Matthew Chidester, City Manager

Address: 501 Main Street, Half Moon Bay, CA 94019

Telephone: 650-726-8272

Email: mchidester@hmbcity.com

[Link to Results Presentation](#)

[Link to Report on Results](#)

City of Edgewater (CO)

We conducted a multi-mode survey to help the City take the first step in the budget process and assist the City Council establishing priorities and goals by gauging resident opinions about services and direction.

Contact: Dan Maples, City Manager

Address: 1800 Harlan Street, Edgewater, CO 80214

Telephone: 720-763-3012

Email: dmaples@edgewaterco.com

[Link to Results Presentation](#)

[Link to Report on Results](#)

Budget

Our pricing is all inclusive. **We do not charge for travel or any other expenses.** We welcome the chance to develop the ideal methodology and budget in discussion with staff. We are flexible.

Community Survey Pricing

Number of Questions/Time	Universe	Number of Respondents	Margin of Error	Cost
To Be Determined	Town of Atherton residents	300	+/-5.8%	\$13,900
To Be Determined	Town of Atherton residents	400	+/-5%	\$19,000
Languages: English, Spanish, and other languages as requested				
Level of confidence: 95%				
Mode: Online, Telephone, and Mail				

