

# Request for Proposals Annual Resident Survey 2024 - 2028

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*Imagine that!*

## I. Background

The Town of Stratford's goal is to build the best community possible. This starts with our vision of a more sustainable future where:

- residents social, physical and spiritual needs are met
- our culture is rich and diverse and our heritage is protected and celebrated
- our natural environment is protected and respected
- there is a thriving local economy
- there is an open, accountable and collaborative governance system

To move the Town towards that future, we developed a strategic performance management system that integrates our Sustainability vision with the Balanced Scorecard. We call this performance management system *Sustainable Stratford - Results Matter*. We identified 16 corporate strategic objectives, a number of initiatives that are designed to move us toward our strategic objectives and a number of Key Performance Indicators (KPIs) to help us to determine if we are getting the results that we seek.

Another key ingredient in our plan to build the best community possible is our Engagement Strategy which is designed to foster a collaborative approach to decision making with residents and stakeholders.

For the past twelve years, we have engaged a consultant to conduct a multi-mode (online and paper version) household survey to gather resident opinions on a range of topics. The survey question bank included:

- A number of questions used to collect KPI data in the areas of governance, health, safety and environmental responsibility - repeated each year to be considered measurable data.
- A number of questions to provide baseline data on ongoing town initiatives like communications, active transportation and water use - repeated every other year to establish a trend.
- Special research questions developed each year to provide detailed information on current issues to help inform decisions and actions on those issues. For instance, the 2023 survey included questions regarding the Town's emergency response following Post Tropical Hurricane Fiona, forest management planning and questions related to the Town's Shape

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Stratford project. A copy of the 2023 and 2022 surveys that were distributed to each household is attached as Appendix A for the information of the bidders.

## II. Scope of the work

We are seeking proposals from qualified firms to conduct an annual multi-mode resident survey for the years 2024 to 2028 including the following:

- Design, lay out and test the annual survey, in accordance with the Town’s brand, as a web based survey which shall be posted online in mid-January each year beginning in January 2024 and a paper version to be distributed to each household in early-mid February of each year including:
  - the annual questions and bi-annual questions referred to in Section III.
  - a set of special research questions on a topic or topics identified by the Town such that the survey does not exceed the size/length of the current survey. The successful bidder shall facilitate a session with internal stakeholders to identify the intent and desired outcome of this component of the survey, and assist with the preparation of wording to achieve the desired results and understanding of the question by the respondent.
  - testing the survey questions via a focus group to ensure that the questions are clear and the desired results are achieved.
  - hosting the online version of the survey (the successful bidder will provide the software and/or pay any hosting fee required).
  - printing and delivery of copies of the paper version to all Stratford households with a self-addressed stamped reply envelope (the successful bidder will make the arrangements and the town will pay for the actual printing and delivery cost).
- Provide training, supervision and quality control for town staff to provide data entry from the paper version of the surveys that are returned.
- Prepare a communication strategy including the development of messaging and tactics to encourage residents to complete the survey. The messaging will be distributed by the town to residents via the various communication channels available and used by the town (digital sign board, website, social media, mass email list, media releases, etc.).
- Provide the online survey tool, and manage the data collection, data validation and quality control.
- Analyze the data and report on the results including weighting household data in accordance with the latest Census of Canada to ensure fair demographic representation, calculating the statistical accuracy of the survey and identifying any statistically significant changes from previous years. The report shall be provided in full colour format in print and electronic versions and a full copy of the survey responses, crosstabs etc. shall be provided in excel format.
- Maintain the annual data spreadsheet and provide an updated copy to the Town of Stratford upon completion of each year of the survey.
- Present a summary of the report to Council and/or residents at a public meeting held in the spring of each survey year.

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- Present a detailed review of the survey to internal stakeholders.
- As an optional component to the proposal, provide a separate price to translate the online version of the survey into a different language (one price per language) for our new immigrants and/or proposals on how the town can better reach and receive responses from this demographic.
- As an optional component to the proposal, provide a separate price to provide data entry services, on a cost per paper survey (and include a credit for the cost of training and supervision of town staff for the data entry component which would not be required if the town exercises this option).

## III. The Survey

With the exception of the special research questions, the remaining questions have been asked each year in the first twelve years of the survey, or in alternating years as outlined below. Each set of questions is asked in substantially the same format, to establish an accurate baseline representation of resident opinions on the questions.

For the 2024 – 2028 surveys, we are proposing that the questions that form part of the KPI data be continued each year and the other baseline questions continue to be asked in alternate years which allows for more space to be freed up in the survey for special research questions and/or to reduce the size of the survey to ensure the return rate remains high. All survey questions will be reviewed annually and the proposed approach may change based on the dialogue between the Town and the successful bidder.

The annual special research questions will be designed to provide resident opinions on a topic or topics of interest to the Town. The successful bidder shall work with a group of internal stakeholders to identify the goal(s) of the research and then research and design questions to obtain the information that the town is seeking. The successful bidder shall test the survey annually with a focus group of residents to ensure that the questions are producing the desired results.

The following are the questions, from the 2023 survey, that are proposed to be included annually:

- Demographic Information – questions 44 - 45 and questions 52 - 59
- Environmental Responsibility - questions 9 – 14 and
- Satisfaction with Town Performance –questions 50 - 51
- Resident Health and Wellness - questions 3 – 8
- Safety – questions 17 - 23
- Your Town – questions 37 - 43

The following are the questions that are proposed to be included bi-annually:

- Sources of information

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- Active transportation
- T3 Transit for Stratford
- Water management
- Engagement Interest
- Volunteering

## IV. Bid Submission Requirements

Bidders are requested to:

- Provide a firm price, per year, to carry out the scope of work specified in Section II for the years 2024, 2025, 2026, 2027 and 2028.
- Provide an optional price, per year, for the input of data from paper based surveys on a per unit basis, and identify any reduction in cost for the training and supervision of town staff for data entry which would not be required if the town exercised this option.
- Provide an optional price, per language per year, to translate the online survey into different languages including promotion of the options in that language and translation of any comments provided in that language into English.
- Provide hourly rates of key personnel for miscellaneous advice during the five year survey period for work outside of the scope of this submission.
- Provide a description of the qualifications and experience of the firm in similar work as well as curriculum vitae for the key members of the team who will be working on the project.
- Provide a proposed methodology, schedule and estimated level of effort of the personnel assigned to the project.
- Provide at least two references from other clients for similar engagements.
- Provide any other information that the bidder believes would be helpful in evaluating the bid.

## V. Instructions and Clarifications

Any and all information provided or made available to the successful bidder shall be treated as confidential information and be returned to the Town. The vendor shall not provide this information to third parties without expressed written approvals from the Town of Stratford. All information submitted becomes the property of the Town. By submitting a proposal or bid, the vendor hereby grants a license to the Town to distribute, copy, print or translate their proposal or bid for the purposes of the invitation.

The primary contact for the project is Wendy Watts, Community & Business Engagement Manager. Questions during the bid process shall be referred to Wendy at 902-569-6921 or via email at [wwatts@townofstratford.ca](mailto:wwatts@townofstratford.ca).

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## VI. Evaluation

Bids will be evaluated on the following basis:

Qualifications and experience of the firm and of the assigned personnel	35%
Proposed methodology, level of effort and schedule	35%
Cost of the work	25%
References and other factors	5%

## VII. Submission of Bids / Proposals

Three copies of each proposal, titled “Stratford Resident Survey 2024-2028”, must be submitted in a sealed envelope no later than Thursday, September 21, 2023 at 12:00 noon AST to the attention of:

Wendy Watts, Community & Business Engagement Manager  
Town of Stratford  
234 Shakespeare Dr.  
Stratford, PE C1B 2V8

**The cost proposal will be submitted under separate cover and will not be opened until the technical evaluation is complete.**

Responses received after the above date and time will not be considered. Fax and email responses will not be accepted. Neither the lowest, nor any submission, shall necessarily be accepted and the decision of the Town shall be final.

All price quotes or bids shall be in Canadian dollars. Any taxes payable must be shown as a separate line item. All expenses related to the performance of the work must be included in bid price submitted.

All artwork, data and survey results that are produced during the performance of this work will become the property of the Town of Stratford.

# Appendix A

## 2023 Resident Survey

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