

## Memo

**To:** Northfield Township Board  
**From:** Howard Fink  
**Date:** 4/9/2015  
**Re:** Citizen Survey Proposals

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Dear Township Board,

The Planning Commission has requested to do a scientific citizen survey as part of their current review efforts on the Master Plan. The Planning Commission put out an RFP for this purpose and to date has only received the following proposal. While there is no action at this time (the P.C. has not yet discussed the proposal) I wanted to bring this to your attention.

Respectfully Submitted,

A handwritten signature in cursive script that reads "Howard Fink".

Howard Fink, Township Manager



CARLISLE

WORTMAN  
associates, inc.

605 S. Main Street, Ste. 1  
Ann Arbor, MI 48104

(734) 662-2200  
(734) 662-1935 Fax


**MEMORANDUM**

**TO:** Northfield Township Planning Commission  
**FROM:** Douglas J. Lewan, Community Planner  
**DATE:** April 8, 2015  
**RE:** Citizen Survey Proposals

Please find attached the citizen survey proposal the Township received. We sent this request out to seven firms and received this proposal to date. As the deadline for proposal submission has passed we need to decide if we want to move forward with the single bid or to re-issue the request to additional firms.

Please read through the attached proposal and be prepared to discuss this topic at our meeting on the 15<sup>th</sup>. Should you have any questions about this proposal or its contents please don't hesitate to call.

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CARLISLE/WORTMAN ASSOC., INC.  
Douglas J. Lewan, PCP, AICP  
Principal

April 2, 2015

Marlene Chockley  
Chair  
Planning Commission  
Northfield Township  
8350 Main Street  
Whitmore Lake, MI 48189

Dear Ms. Chockley:

Communities use many forms of research to decide what they should do and how they should grow. In 2010-2012, Northfield Township used planning fairs, a mailed survey and public hearings that resulted in the master plan approved in July of 2012.

Even the most prescient master plan, though, may not anticipate all the possibilities that development proposals may bring to the table. The plan itself acknowledges that uncertainty, saying "As this Master Plan is being written in 2010-2011, during one of the most difficult economic downturns in the history of the State and nation, many of the previous population and housing projections for this area are uncertain ... A change in the economic forecasts of this region (either up or down) will change the projections and some of the assumptions contained in these pages."

In fact, residential development is booming throughout southeast Michigan. A developer has approached the township to build 800-1,200 units on 460 acres in the primarily agricultural southwest corner of the township and has proposed an amendment to the master plan.

The township's most active and vocal citizens are divided on the merits of the proposal. Its leaders recognize that an objective, quantitative survey of a representative sample of all township residents is the best way to make a decision.

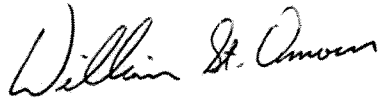
Cobalt Research has conducted research studies for more than 100 municipalities, school districts, institutions and corporations. Our work has enabled communities to make data-driven decisions with confidence.

- When the city of Royal Oak asked voters if they would support a modest tax increase dedicated to maintain and reconstruct local roads, 57 percent of the respondents said "Yes." A November, 2014 vote for up to 2.5 mills for streets was supported by 54 percent of the voters.
- The city of Walla Walla, WA had been unable to pass a package of funding for a municipal pool, although this was a major concern for residents. A 2014 survey identified the most desired pool features and the voters' preferred funding mechanism, and a February, 2015 ballot initiative passed 64%-36%.
- Kalamazoo Township's survey showed that residents' top priority was road repair. That gave the township the confidence to request a \$10 million road improvement bond in February 2015, which was approved 935-614.

In this endeavor, Cobalt is partnering with Sharlan Douglas of Douglas Communications Group, who combines 30+ years of experience as a public relations consultant with nine years as a planning commissioner and her most recent position as a Royal Oak city commissioner.

Ms. Douglas's ability to generate consensus and manage projects in the public arena combined with our deep experience in municipal research make us the ideal team to meet Northfield Township's current challenge.

Sincerely,

A handwritten signature in black ink that reads "William St. Amour". The signature is written in a cursive style with a large initial 'W'.

William SaintAmour  
Executive Director

## NORTHFIELD TOWNSHIP, MI

PROPOSAL FOR RESEARCH

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April 2, 2015

Submitted by:

William SaintAmour  
Executive Director  
1134 Municipal Way  
Lansing, MI 48917

T: (877) 888-0209

F: (517) 703-9704

E-mail: [wsaintamour@cobaltcommunityresearch.org](mailto:wsaintamour@cobaltcommunityresearch.org)

*Nondisclosure Statement: All materials contained in this agreement are the confidential and proprietary property of Cobalt Community Research. The information contained herein is provided by Cobalt Community Research for evaluation by the Partner. Dissemination to other parties is prohibited.*

## COBALT EXPERIENCE AND BACKGROUND

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Cobalt Community Research (Cobalt) is a national 501c3 nonprofit organization with a mission to provide research and educational tools that help schools, local governments and other nonprofit organizations across the United States thrive as changes emerge in the economic, demographic and social landscape. Cobalt is located at 1134 Municipal Way, Lansing, Michigan 48917; (877) 888-0209; F: (517) 703-9704; E-mail: wsaintamour@cobaltcommunityresearch.org.

Incorporated in 2007, Cobalt Community Research is a nonprofit research coalition created to give governmental organizations and other associations access to high-quality research at a more reasonable rate through pooling than what is available in the private sector. Cobalt project leads are current public sector practitioners who provide their expertise to improve engagement and alignment between governmental units and the people they serve. Cobalt is the only national nonprofit research coalition in the United States.

Cobalt has been very active in providing research services to local units of government. Projects include the City of Allentown (PA), Luna County (NM), City of Brookfield (WI), City of Copperas Cove (TX), City of Janesville (WI), City of Las Vegas (NV), City of Lakeland (FL), City of Oak Creek (WI), City of Rocky Mount (NC), City of Roseville (MN), City of Warren (MI), City of Wausau (WI) and Saint Clair County (MI). Cobalt provides proprietary sampling, questions and analysis with the ability to add custom questions that meet partnering organizations' specific needs. This provides them with clear, action-oriented insight on funding priorities, quality of life and the services that citizens value.

An important element of the program Cobalt offers are the annual benchmarks we produce. Each year, Cobalt conducts an annual random survey of residents across the United States. This information is used to create more than 80 benchmarks, each of which can be filtered by demographic factors such as age, educational level, gender, work location, household composition, income and more. In addition, these annual benchmarks are developed for individual states, Census regions, the United States overall and also for similarly sized communities across the region and country. This information, along with our unique insight into local government, offers important insight for budgeting and economic development. The coalition offers the only annual, scientifically-generated benchmarking study of citizen perception and engagement in the country. The resulting scientific index provides a more stable reference frame to compare against over time.

Cobalt is a unique coalition offering scientifically rigorous research, customization, actionable analysis and robust benchmarks unlike anything else available to local governments.

## QUALIFICATIONS AND EXPERIENCE OF THE PROJECT TEAM

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Cobalt provides research services that comply with generally accepted research principles. In addition, projects and services will be led by Cobalt staff certified by the Market Research Association's Professional Researcher Certification (PRC) program, which is endorsed by major national and international research organizations such as the AMA (American Marketing Association), the ARF (Advertising Research Foundation), CMOR (Council of Marketing and Opinion Research), IMRO (Interactive Marketing Research Organization), MRII (Marketing Research Institute International), the RIVA Training Institute and the Burke Institute.

The head of research will be William SaintAmour. He serves as research director at the Municipal Employees' Retirement System of Michigan (MERS) and as executive director of Cobalt Community Research. He also has

served the State of Michigan Department of Management and Budget, the Michigan Office of Retirement Services and ADP. He has worked in the research and communications fields for more than 25 years.

Mr. SaintAmour earned an executive certificate from the University of Michigan Ross Business School, a master's degree from Michigan State University and a bachelor's degree from the University of Michigan in Dearborn. He has Certificates of Achievement in Public Plan Policy in employee health and employee pensions and holds the professional research certificate from the Market Research Association.

The project will be coordinated by Sharlan Douglas, president of Douglas Communications Group, a public relations consultancy. She spent nine years on the Royal Oak Planning Commission until being elected to the city commission in 2013. She is the current president of the Michigan Association of Planning.

Ms. Douglas was the founding executive director of the Eight Mile Boulevard Association and the CEO of a chamber of commerce following 30 years in public relations, marketing and fund development. She has facilitated community visioning processes for two cities and managed opinion research projects for several state trade and professional associations. Ms. Douglas received a BA in journalism from Michigan State University and has completed the course work for a master's degree in urban planning at Wayne State University. She is accredited by the Public Relations Society of America.

Analysis, compilation and preparation of results will be conducted by research analyst Pete Charette. Mr. Charette holds the Professional Researcher Certificate from the Market Research Association, has earned a Market Research Certificate from the University of Georgia and holds a bachelor's degree in business administration from Western Michigan University. In addition to his work with communities such as the City of Wausau (WI), City of Las Vegas (NV), City of Lakeland (FL) and the City of Wayne (MI), Mr.. Charette has also worked with the Grosse Pointe Chamber of Commerce and the five Grosse Pointe communities. He has over seven years of experience with local governments.

Sampling and logistics will be conducted by Billie Harris. Ms. Harris holds a bachelor's and master's degrees from Michigan State University and is experienced in data collection methodology and sample design. She has worked on projects that include the Michigan Office of Retirement Services, City of Lakeland (FL), City of Las Vegas (NV) and Luna County (NM). Ms. Harris has more than nine years of experience with local governments.

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#### COBALT'S DELIVERABLES

The results of the project report will include the following:

- Executive summary
- Survey background
- Copy of survey instrument
- Profile of Northfield Township
- Profile of respondents
- General overview of the survey
- Content description and summaries of each survey topic
- Statistical analysis of survey results including graphs, raw data and any other information which could be beneficial to the report.
- Related appendices that include detailed cross-tabs of all demographic groups and all questions
- Raw data upon request (excludes respondent ID to preserve confidentiality)

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#### COBALT PARTNERS

Below are some of the organizations with which Cobalt has worked in recent years:

- Aetna
- ALIVE (Charlotte MI)
- Avondale School District, MI
- Birch Run Area Schools, MI
- Bloomfield Hills Schools, MI
- Bridgeport-Spaulding Community Schools, MI
- Buena Vista School District, MI
- Carrollton Public Schools, MI
- Charlotte Aquatic Center, MI
- Charlotte Performing Arts Center, MI
- Charlotte Public Schools, MI
- Charlotte Area Networking for Development and Opportunity (CANDO)
- City of Allentown, PA
- City of Bloomfield Hills, MI
- City of Brookfield, WI
- City of Charlotte, MI
- City of Clare, MI
- City of Copperas Cove, TX
- City of Dearborn, MI
- City of Ferndale, MI
- City of Garden City, MI
- City of Grosse Pointe, MI
- City of Grosse Pointe Farms, MI
- City of Grosse Pointe Park, MI
- City of Grosse Pointe Shores, MI
- City of Grosse Pointe Woods, MI
- City of Janesville, WI
- City of Las Vegas, NV
- City of Lakeland, FL
- City of Oak Creek, WI
- City of Oak Park, MI
- City of Pleasant Ridge, MI
- City of Rocky Mount, NC
- City of Roseville, MN
- City of Royal Oak, MI
- City of Saline, MI
- City of Walla Walla, WA
- City of Warren, MI
- City of Wausau, WI
- City of Wayne, MI
- City of Williamston, MI
- City of Ypsilanti, MI
- Chesaning Union Schools, MI
- Comstock Charter Township, MI
- Cumberland County, PA
- Dewitt Charter Township, MI
- Edward Lowe Foundation, MI
- Employee Benefits Research Institute
- Farmington Public Schools, MI
- Florida Benchmarking Consortium, FL
- Frankenmuth School District, MI
- Freeland Community School District, MI
- Gabriel, Roeder, Smith & Company (GRS)
- Gallagher Benefit Services
- General Electric (GE)
- Gerald R. Ford School of Public Policy, University of Michigan
- Government Finance Officers Association
- Grosse Pointe Chamber of Commerce, MI
- Hartland Township, MI
- Hayes Green Beach Memorial Hospital
- Hemlock Public School District, MI
- Ice Miller
- Illinois Municipal Retirement Fund (IMRF)
- ING
- International Economic Development Council
- International Foundation of Employee Benefit Plans
- Institutional Society of Risk Professionals
- Kalamazoo Charter Township, MI
- Kansas Government Finance Officers Association
- Luna County, NM
- Maple Valley Schools, MI
- Marquette Township, MI
- Merrill Community Schools, MI
- Michigan Association of School Administrators
- Michigan Association of Transit Systems
- Michigan Government Finance Officers Association
- Michigan State Medical Society
- Michigan Municipal League
- Michigan Office of Retirement Services
- Michigan State University Local Government Benchmarking Consortium
- Michigan Township Association
- Midland (MI) Public Schools, MI
- Milliman
- Minnesota State Retirement System, MN



- Mississippi Public Employees' Retirement System, MS
- Missouri State Employees' Retirement System, MO
- Missouri DOT and Patrol Employees' Retirement System, MO
- Munder Capital Management
- Municipal Employees' Retirement System (MERS) of Michigan
- National Association of State Retirement Administrators (NASRA)
- National Conference on Public Employee Retirement Systems (NCPERS)
- National Council on Teacher Retirement (NCTR)
- New York State Teachers' Retirement System (NYSTRS)
- Northstar Academy, MI
- Ohio Public Employees' Retirement System
- Ohio School Employees' Retirement System
- Oshtemo Charter Township, MI
- Pittsford Area Schools, MI
- Plante & Moran
- Public Financial Management (PFM)
- Public Pension Financial Forum (P2F2)
- Saginaw Intermediate School District, MI
- Saginaw Township Community Schools, MI
- Salem Township, MI
- School District of the City of Saginaw, MI
- Southeast Michigan Council of Governments (SEMCOG)
- St. Clair County, MI
- Swan Valley School District, MI
- Tegrit Group
- Texas Charter Township, MI
- Tyrone Township, MI
- The International Foundation of Employee Benefits
- University of Michigan Center for Local, State and Urban Policy
- Wichita State University, KS
- Ypsilanti Charter Township, MI
- Yale Public Schools, MI

## REFERENCES

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Southeast Michigan Council of Governments (Custom survey projects in 2008, 2010, 2011, 2012, 2013 and 2014)

Dave Boerger, SEMCOG Consultant  
1001 Woodward Avenue, Suite 1400  
Detroit, MI 48226  
[boerger@semcog.org](mailto:boerger@semcog.org)  
(248) 875-7120

City of Royal Oak, Michigan (Project in 2013)  
Stewart Meek, Assistant to the City Manager  
211 South Williams Street, Royal Oak, MI 48067  
[stewartm@ci.royal-oak.mi.us](mailto:stewartm@ci.royal-oak.mi.us)  
(248) 246-3204

City of Warren, Michigan (Project in 2009, 2011 and 2013)  
Lark Samouelian, Communications Director  
5460 Arden Road, Warren MI 48092  
[lsamouelian@cityofwarren.org](mailto:lsamouelian@cityofwarren.org)  
(586) 258-2015

Charter Township of Texas (Project in 2013)  
Julie VanderWiere, Township Superintendent  
7110 West Q Avenue, Kalamazoo, MI 49009  
[julievw@texastownship.org](mailto:julievw@texastownship.org)  
(269) 375-1591

## TOWNSHIP RESPONSIBILITIES

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There are several areas where Northfield Township is responsible for actionable information.

1. Provide Cobalt with scanned copy of the signed and dated agreement
2. Identify a primary point of contact (project lead) on the township staff  
Provide Cobalt with voter registration or utility billing records in Microsoft Excel or TXT format
3. Provide timely feedback on finalizing scope of services and preferred questions
4. Provide Cobalt with timely revisions of survey instrument and cover letters
5. Provide Cobalt with timely approvals of survey instrument and cover letters
6. Provide Cobalt with a date, time and location of meeting for final presentation of results

## SURVEY METHODOLOGY

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Cobalt recommends administering the questionnaire to a random sample of 1,500 citizens drawn from voter registration or utility billing records. Conducting a random sample of this size allows the township to gather representative and statistically valid data at a lower cost compared to a census. In addition to the random sample, Cobalt also recommends a multi-modal methodology approach by collecting surveys through two waves of a mailed survey along with a URL to complete the survey online. Each randomly selected resident will have a unique identification number to prevent multiple responses from the same resident and to avoid a reminder message to residents who already completed the survey. Deployment and data collection is generally completed within six weeks. Cobalt's response rate for a mail/online combination survey is generally between

25 and 35 percent. The combination of mail and online has proven very effective and provides a higher response rate. Township communication in newsletters and media can increase this response rate.

After the township approves the survey, Cobalt mails an initial copy of the survey with a postage paid envelope. After approximately 10 days, non-respondents receive a second reminder letter with a copy of the survey and postage paid envelope.

Data is coded by industry professionals utilizing current technology and robust quality control to ensure accuracy. Data scrubbing of final results ensures duplicate responses, multiple responses from the same individual and responses from invalid survey ID numbers are removed.

Cobalt proposes a five-step process for the development of the assessment.

**Step 1 – Kick-off Discussions**

Clarify the issues and make sure all relevant voices are heard in developing the objectives of the study. Refine the scope, timeline and key deliverables for the project. Confirm informational needs. The collection methodology will also be finalized during this step.

**Step 2 – Questionnaire Development**

Based on the input received during Step 1, Cobalt and the township will develop questions for the questionnaire which will be presented and discussed with the project lead to ensure that the questions included in the assessment are aligned with organizational needs.

**Step 3 – Assessment Deployment**

Cobalt publishes the assessment in the manner determined by the township (mailings, Eblast, Internet only, phone). The Cobalt team’s public relations consultant will publicize the launch of the survey. Cobalt collects and codes the responses.

**Step 4 – Modeling & Analysis**

Cobalt will analyze the data and develop modeling using Cobalt’s proprietary methodology, which quantifies the relationships between the various elements of the assessment.

**Step 5 – Reporting**

Findings will be communicated to the project lead and other key decision makers in a meeting, with the Township to determine whether that will be at the planning commission or board of directors. A summary report in PowerPoint, detailed cross tabs, and other supporting documents will be provided to the project lead.

FEE SCHEDULE

Count	Core Package	Subtotal
1	Includes administration, meetings, correspondence, planning, publicity placement executive summary in MS PowerPoint, 2 sheets (4 pages of custom questions (which can include budget priority analysis, future projects, communication preference, etc.,) demographic questions, detailed cross-tabs with thermal mapping, raw data, phone-based follow-up with sponsor on draft results, onsite presentation of final results	\$ 6,497
<b>Additional Modules and Options (See reference for Examples)</b>		
	Additional Pages: \$1,000 per page	\$ -
	Non-English Versions: \$650 per translation	\$ -
	Follow-up Citizen Work Groups/Focus Groups (Sponsor provides location and recruits participants): \$1,200	\$ -
<b>Distribution</b>		
1	Web link for completion online (included) \$Waived	\$ -
	Eblast distribution via email list provided by Sponsor (3 waves): \$100 per 1,000 recipients	\$ -
1	Mail distribution: Production and postage for an initial first class mailing to 1,500 residents of the assessment with cover letter, data entry, a second mailing to those who have not responded, and business reply postage. <b>\$3,550</b>	\$ 3,550
	Mail distribution: Production and postage for an initial non-profit rate mailing to 1,500 residents of the assessment with cover letter, data entry, a second mailing to those who have not responded, and business reply postage. <b>\$2,800</b>	\$ -
<b>Total Quote: \$10047</b>		

CONCLUSION

While our services to Northfield Township will focus on a specific issue, Cobalt's work with communities across the country gives us a unique understanding about the many, broad issues affecting local governments. As a Michigan based non-profit, we care about the success of Michigan communities. Our partners consistently give us very high marks in satisfaction.

"The information we received from working with Cobalt was excellent in better understanding our organization. I would highly recommend other municipalities to utilize Cobalt and the survey methods when making planning and budgeting decisions."

Karen Lovejoy Roe, Township Manager  
Charter Township of Ypsilanti, MI

We welcome the opportunity to help Northfield Township find the right framework for future development decisions.