



PSU Regional Research Institute for Human Services  
Scope of Work for the Portland Insights Study & Spring 2022 Survey  
Project Period: 1/01/2022 - 12/31/2023

### **Project 1: Portland Insights Survey**

The Regional Research Institute for Human Services (RRI) at PSU, in on-going collaboration with Portland's City Budget Office, will conduct a two-year Portland Insights Study, which will have both quantitative and qualitative components. The Portland Insights Survey aims to:

- Develop a better understanding of Portlanders' perception of City government and its services through both quantitative surveying and qualitative focus groups with members from a wide range of communities and neighborhoods (with special attention given to ensure representation of traditionally underrepresented populations, including Black, Indigenous, Peoples of Color, and people with disabilities).
- Understand community needs and provide "hard to measure" outcome data for bureaus to assess the impact of programs and services.
- Obtain results that will help inform bureau leadership and City Council on resident budget and policy prioritization, informing the City's budget development, policy making, and performance management processes.
- Utilize data from the survey to measure improvement on goals established in Citywide plans, such as the Portland Plan, Climate Action Plan, Racial Equity Plan, and the City Comprehensive Plan.
- Promote accessibility of the survey data by ensuring availability in a usable format internally to bureaus, and externally to the public as applicable.
- Qualtrics survey software will be used to collect quantitative data via an online survey, and a series of both in-person and virtual focus groups will be conducted to collect qualitative, in-depth information and experiences from Portlanders throughout the Portland Metropolitan area. Participant recruitment efforts for both the quantitative and qualitative phases will focus on reaching those who were underrepresented from previous Portland Insight Studies and those from the BIPOC communities.

#### **RRI's overarching responsibilities are:**

- In close collaboration with City and project leadership and community partners, revise the current quantitative survey and administer it online via Qualtrics (or via phone or paper survey to best accommodate participant needs).
- In close collaboration City and project leadership and community partners, create and finalize the protocol and interview questions for the qualitative study, which will involve conducting approximately 10 focus groups and a series of individual interviews with those who are not comfortable in a group conversation.
- Conduct data clean-up and analysis of both quantitative and qualitative data.
- Review findings from the quantitative survey and qualitative study with community members (member checking) to assess whether the collected data and its interpretation make sense and are relevant.
- Provide written reports that include survey methodology and data analysis.
- Provide raw data and key analytic figures to City, disaggregated by geographic and demographic subcategories. These data and figures should adhere to City's data privacy guidelines and be in a format that allows City staff to create public-facing dashboards.

### **Collaboration and process coordination:**

- Work collaboratively with Portland's City Budget Office, facilitate 2 to 4 meetings with the City's internal stakeholders and other community stakeholders to revise, finalize, and report findings from the quantitative survey and the qualitative study.
- Partner with Portland's City Budget Office and community organizations to reach as many participants as possible, with an intentional focus on reaching underserved communities, including BIPOC participants, LGBTQ+, and disabled community members.
- Work with project leadership, and community-based organizations and groups (neighborhood associations, community centers, social service agencies) to develop recruitment messaging that is specific to their communities and stakeholder groups – for webpage development, advertisement about the study will be included to bolster participant recruitment efforts.
- Monthly (or as mutually agreed), meet with project leadership and community partners to review preliminary results after sufficient data have been collected.
- Participate in coordination meetings with other project partners and community partners, as requested.
- Provide updates to the project team, relevant City of Portland bureau representatives, and Portland City Council as needed.
- Participate in meetings with Portland's City Budget Office and community partners to share lessons learned and recommendations for next steps.

### **QUANTITATIVE SURVEY: (January – December 2022)**

#### **Project design and data collection**

- Obtain Human Subjects Research approval via PSU's Institutional Review Board.
- Maintain local research data files and databases and remain in compliance with contract/ IGA terms and conditions.
- Meet with Bureau leadership and other community stakeholder groups regarding survey development to revise (delete/rewrite some items) and finalize the current quantitative survey.
  - Along with the various Bureaus and community member participation and input, assess which of the current survey items to keep, revise, or delete. This will be done via an iterative process of review, feedback, and editing until a final version is mutually accepted by all parties. PSU will coordinate the logistical requirements of these meetings, including but not limited to, accessibility requirements, noticing, digital meeting invitations, and if applicable, providing refreshments.
  - Coordinate with the Advisory Committee, including community advisors, to finalize and review survey design. This includes the survey items, survey layout, and demographic and geographic subcategories to be used (including but not limited to race, ethnicity, age, gender, income, education level, zip code).
- In collaboration with project leadership and community stakeholder groups, develop a sampling plan.
- Create web and paper versions of the survey.
  - Program the web survey, using Qualtrics, in English, Spanish, Chinese, Vietnamese, and Russian.
  - Test the web survey to ensure functionality and accuracy.
  - Provide the City Budget Office, community members, and other stakeholders with a web survey link to review and provide continued feedback on the Portland Insights survey, especially those surveys that have been translated to ensure accurate translation.
  - Finalize the programming based on the iterative review and feedback process.

- Secure and activate a URL (e.g., [www.portlandinsightssurvey.org](http://www.portlandinsightssurvey.org)) and a project telephone number. Survey findings will also be posted to a City website, to tell the background of the survey and provide data/ findings to the public. These project contact options will allow participants to ask questions about the survey, about their participation in the study, and find results.
- Work with community members and the City Budget Office to translate/ accurately format the finalized English web survey into paper versions in all five languages: English, Spanish, Chinese, Vietnamese, and Russian.
- Print copies of the survey for manual distribution as needed to those who are not comfortable completing the web survey or who do not have the capacity to do so.
- Collaborative efforts for communications and distribution of the survey broadly throughout Portland, Oregon, which may include but are not limited to:
  - Work with the City, who will lead communication efforts, such as advertising the survey via news releases, paid social media posts, PSAs, etc.
  - Train and support community members who will serve as data collectors, and serve as canvassers to go door-to-door if necessary, to increase community participation/ engagement in the survey; also, work with community agencies and centers to increase engagement and survey participation.
  - Train Community Data Fellows and community members regarding advertising and distributing the survey (web and paper versions).
  - Distribute paper surveys throughout Portland (libraries, community centers, neighborhood association meetings, etc.).
  - RRI staff may collect some surveys by phone to support the data collection effort and will work with native language speakers in the 4 non-English languages to conduct phone interviews.
  - Track progress in real time and coordinate with community members and City staff to ensure adequate participation from under-represented communities. This may require adjusting outreach focus during survey administration.
- Conduct in-person and/ or telephone interviews per the request of the participants with interviewers who are fluent in the preferred participant language choice, if their preferred language falls outside the five languages the web and paper survey has been translated to.
- Receive and enter paper surveys into an electronic data file.
- Distribute \$50 gift cards through a drawing, selecting 100 survey completers in the fashion of a sweepstake, in which participants win the gift cards based on chance alone. The City will purchase the gift cards and PSU will have full responsibility setting up the sweepstakes, clarifying the terms of participation, selecting recipients, and distributing the gift cards.
- In collaboration with project leadership and community stakeholder groups, develop an analysis plan.
- Merge data files across multiple modalities and prepare for analysis.
- Conduct analyses, including descriptive statistics and subgroup comparisons, using SPSS statistical software. Provide reproducible SPSS command syntax where possible and provide a guest SPSS license for CBO.
- Prepare a written report that provides the City of Portland and the public with an understanding of resident perception of City government and its provided services and will feature data and analysis on responses by major demographic group and/or by geography as meaningful or salient as PSU and the City mutually agree. The report should include a copy of the survey(s), scientific descriptions of survey methodology, response rates, demographics of respondents, findings, summarized data, and benchmark comparisons to other cities (if applicable). The report should be written in a format that allows the City to assess potential impacts of the survey results on policy and budget formation and performance management within the City of Portland and provide justified recommendations for future iterations of the Community Insights Survey into the report.

- Provide raw data and key analytic figures to City, disaggregated by geographic and demographic subcategories. These data and figures should adhere to City's data privacy guidelines and be in a format that allows City staff to create public-facing dashboards.
- Oversee the project, including contract management, fiscal tracking, personnel management, and coordination with Portland's City Budget Office.

### Reporting:

PSU RRI will provide the following report to Portland's City Budget Office:

- **December 2022:** A final report, which includes at a minimum, a summary of all efforts and accomplishments, summary of survey findings, and/or project updates, will be submitted to Portland's City Budget Office. After review of the final report, incorporate any additional information/analyses per the request of the City and/or other community leaders and members.

### Timeline – Quantitative Survey (Two-Year Portland Insights Survey)

Activity/ date	Jan 2022	Feb 2022	March 2022	April 2022	May 2022	June 2022	July 2022	Aug 2022	Sept 2022	Oct 2022	Nov 2022	Dec 2022
IRB approval												
Design English quant survey												
Qualtrics and paper surveys translated into Russian, Vietnamese, Chinese, Spanish												
Survey deployment												
Data analysis												
Quant survey final report work												

### QUALITATIVE STUDY: (January - December 2023)

#### Qualitative questions design and participants selection

- Secure Institutional Review Board approval for qualitative study.
- Maintain terms and conditions of the contract/ IGA.
- Facilitate meetings and work with City staff and advisory committees to develop study priorities, including topics or communities to focus on in order to maximize City goals and the ability of City leadership to utilize the information in decision-making.
- Work with City staff and advisory committees to develop focus group questions (and as needed, 1:1 interview questions) and process for soliciting input via both in-person and virtual focus group meetings and individual interviews. Qualitative questions will be translated into four other languages in addition to: English, Chinese, Vietnamese, Russian, and Spanish.
- Recruit and/ or select focus group participants in collaboration with City staff and community partners. Invite those who do not want to participate in a group conversation the option to participate in an individual, 1:1 interview (in-person, telephone, virtual).
- Collaborate with City staff and community partners to produce qualitative study plan, which includes a plan for informed consent and protection of confidentiality for focus group and interview participants

### Deployment of the qualitative study, at a minimum include:

- Conduct culturally sensitive and/or geographically specific focus groups, facilitated by native speakers in the 5 languages included in the study (English, Chinese, Vietnamese, Russian, and Spanish). The format and number of focus groups will be informed by a clearer articulation of goals following the development of the quantitative survey and the findings it provides, though 10 to 12 focus groups are anticipated. PSU will coordinate the logistical requirements of these meetings, including but not limited to, accessibility requirements, noticing, digital meeting invitations, and if applicable, providing refreshments.
- Utilize other means to solicit qualitative responses from community members, including in-person/ telephone/ virtual individual interviews.
- Compensate focus group participants. City will provide funds and determine compensation amounts.
- Provide recordings, and if available, transcripts and notes on the focus groups and in-person/telephone/virtual individual interviews.

### Analysis and reporting

- Comprehensively analyze data via a thematic approach, assessing and interpreting theme, ideas, and lived narrative experiences that are shared by Portlanders throughout the qualitative study. Provide the qualitative codebook and coded transcripts.
- Produce a written report summarizing focus group methodology, including sampling and recruitment methods, and summarizing overall findings. The report should be formatted in a way that allows the City to assess potential impacts of the survey results on policy, budget formation, and performance management within the City, among other potential topics.
- Provide raw data, disaggregated by geographic and demographic subcategories, to the City Budget Office.

### Timeline -- Qualitative Study (Two-Year Portland Insights Survey)

Activity/ date	Jan 2023	Feb 2023	March 2023	April 2023	May 2023	June 2023	July 2023	Aug 2023	Sept 2023	Oct 2023	Nov 2023	Dec 2023
IRB												
Design qual protocol/ questionnaire												
Questions translated into other 4 languages												
Conduct focus groups / 1:1 interviews												
Data analysis												
Qualitative study report –draft and final version.												

### Budget and Payment Schedule – Two-Year Portland Insights Survey

PSU will bill CBO on a quarterly basis based on expenditures incurred, unless and to the extent the Parties agree in writing to alternate disbursement or payment arrangements. The total budget for the two-year contract shall not exceed \$170,000.

Detailed budget line-items are listed below:

Portland Insights Survey				Budget
BUDGET	Salary month/ hourly	FTE/ Hrs	Mos	
Mary Oschwald, RRI, Principal Investigator	\$9,868	0.20	24	\$47,366
**Project oversight and coordination with City Budget Office				
**PSU IRB application and contracts				
**Data collection oversight				
**Work closely with CELs/ community stakeholder groups/assoc				
**Assist with data analysis and report writing				
	OPE @	60%		\$28,414
Debi Elliott, RRI, Co-Principal Investigator	\$48	225	24	\$10,905
**Project guidance, consultation, and survey development				
**Assist with data collection oversight				
**Quantitative data cleanup				
**Data analysis				
Amanda Pratt, RRI, Study Manager	\$30	390	24	\$11,700
Manage day-to-day project operation; maintain data bases; community outreach	OPE @	9%		\$1,053
Ethan Sharygin, PSU Population Research Center, statistician	\$7,730	0.10	4	\$3,092
Survey / sample size development re: REALD/SOGI instruments on the questionnaire	OPE @	55%		\$1,701
Huda Alkitkat, PSU Population Research Center, statistician	\$5,953	0.10	4	\$2,381
Survey / sample size development re: REALD/SOGI instruments on the questionnaire	OPE @	46%		\$1,095
Holly Hein, Office Specialist	\$4,426	0.04	22	\$3,895
**Document review, formatting, and editing				
**Personnel management, payroll processing				
Tyson Vanover-Hill	\$5,871	0.04	22	\$5,166
** Web/ Qualtrics survey programming/ maintenance				
Supplies				
\$100				
Hourly Staff	\$17	400	24	\$6,800
**Data entry -- Spanish translation into English				
**Assist with quantitative data summaries and presentation materials				
Total Direct Costs				\$134,921
PSU				
Local				
Govern				
ment				
Indirect				
Cost				
Rate				26%
				\$35,079
Total Project Costs				\$170,000

## Project 2: Spring 2022 Qualtrics Web Panel

The Regional Research Institute for Human Services (RRI) at PSU, in collaboration with Portland's City Budget Office and the City of Portland Mayor's Office, will conduct a Qualtrics web panel [survey](#) in Spring, 2022 to support the Mayor's Office budget development process.

### **RRI's overarching responsibilities are:**

- Review proposed questions from the Mayor's Office and make suggestions to enhance achievement of survey goals and data integrity, as applicable and appropriate.
- Program the web survey, using Qualtrics, in English, Spanish, Chinese, Vietnamese, and Russian.
- Test the web survey to ensure functionality and accuracy; adjust and make revisions as necessary to achieve survey goals.
- Provide the Mayor's Office and the Budget Office with a web survey link to review and provide feedback before release.
- Work with Qualtrics to implement the survey through their panel partners.
- Conduct data clean-up and analysis of survey data.
- Provide initial summary of results by the end of March, followed by a more formal written report that includes survey methodology, data analysis, and the survey findings.
- Provide raw data and key analytic figures to City, disaggregated by geographic and demographic subcategory(ies) dependent upon sufficient same size of respondents within each demographic.
- These data and figures should adhere to City's data privacy guidelines and be in a format that allows City staff to create public-facing dashboards.

### **Collaboration and process coordination:**

- Work collaboratively with Portland's Mayor's Office and City Budget Office as needed to revise, finalize, and report findings from the quantitative survey.
- Provide project updates to the Mayor's Office and relevant City Budget Office staff as appropriate.
- Participate in meetings with Portland's Mayor's Office and City Budget Office to share lessons learned and recommendations for next steps.

### **Reporting:**

PSU RRI will provide the following report to Portland's City Budget Office and the City of Portland Mayor's Office:

- **April 2022:** A final report, which includes a summary of panel findings disaggregated by geography and race/ethnicity as feasible in a statistically sound way, will be submitted to Portland's City Budget Office. After review of the final report, incorporate any additional information/analyses per the request of the City.

### **Budget – Qualtrics Web Panel Survey**

PSU will bill CBO on a quarterly basis based on expenditures incurred, unless and to the extent the Parties agree in writing to alternate disbursement or payment arrangements. The total budget for the contract shall not exceed \$40,251.

Detailed budget line-items are listed on the next page.

<i>Spring 2022 Survey</i>				
<b>BUDGET</b>				
<b>Mary Oschwald, RRI, Principal Investigator</b>	\$9,868	0.20	2	\$3,947
**Project oversight and coordination; PSU IRB application and contracts				
**Assist with data analysis and report writing	OPE @	60%		\$2,368
<b>Debi Elliott, RRI, Co-Principal Investigator</b>	\$48	40	2	\$1,939
**Project guidance, consultation, and survey development				
**Assist with data collection oversight	OPE @	35%		\$679
**Quantitative data cleanup				
**Data analysis				
<b>Holly Hein, Office Specialist</b>	\$4,426	0.04	2	\$354
**Document review, formatting, and editing	OPE @	85%		\$301
<b>Tyson Vanover-Hill</b>	\$5,871	0.05	2	\$587
** Web/ Qualtrics survey programming/ maintenance	OPE @	68%		\$399
<b>Qualtric Panel purchased from Qualtrics</b>				\$21,000
<b>Hourly Staff</b>	\$17	20	2	\$340
**Data clean-up; prepare final materials				
				\$31
<b>Total Direct Costs</b>				<b>\$31,945</b>
PSU				
Local				
Govern				
ment				
Indirect				
Cost				
Rate 26%				\$8,306
<b>Total Project Costs</b>				<b>\$40,251</b>



**ORDINANCE No. XXXX**

## **IMPACT STATEMENT**

**Legislation title:** Authorize Intergovernmental Agreement with Portland State University in the amount of \$210,251 to design and deploy the Portland Insights survey and Spring 2022 Survey (Ordinance)

**Contact name:** Ning Jiang ([ning.jiang@portlandoregon.gov](mailto:ning.jiang@portlandoregon.gov))

**Contact phone:** (503) 865-6892

**Presenter name:** Ning Jiang

### **Purpose of proposed legislation and background information:**

The City Budget Office is conducting the Portland Insights Survey, a yearly survey that helps the City to gain a better understanding of Portlanders' perception of City government and its services. This will be accomplished through both quantitative surveying and qualitative focus groups with members from a wide range of communities and neighborhoods. In addition, the Mayor's office would like to get community members' inputs for immediate guidance on the FY 2022 Budget by conducting a Spring 2022 Survey. This ordinance authorizes the agreement with Portland State University to design and deploy the Portland Insights survey in 2022 and 2023 and the Spring 2022 Survey in 2022.

### **Financial and budgetary impacts:**

- The total value of the IGA/contract is for \$210,251 (See EXHIBIT A), including \$170,000 for the Portland Insights Survey, and \$40,251 for the Spring 2022 Survey.
- City Council has approved of continuous, yearly budget of \$125,000 for the Portland Insights Survey project. This amount of has been approved in the Fiscal Year (FY) 2021-22 and is funded in the ongoing base budget in FY 2022-23 and beyond. The total \$170,000 contract amount for the Portland Insights Survey will be funded via a combination of funds allocated for the contract in FY 2021-22 and FY 2022-23.
- Funding in the amount of \$40,251 for the Spring 2022 Survey is available in the Fiscal Year (FY) 2021-2022 Budget.
- There are no direct increases in revenue anticipated as a result of this ordinance. However, it is anticipated that the results of the Portland Insights Survey will help guide City's budgeting and policy-making efforts to make our programs more cost-effective in the long run.

### **Community impacts and community involvement:**

Community engagement is an integral part of the Portland Insights Survey. The format of the survey will alternate between being quantitative and qualitative in alternate years. In 2022, the first round of the quantitative Portland Insights Survey will be open to all Portlanders. Special attention will be paid to ensure representation from underserved communities, including Black, indigenous, Peoples of Color, LGBTQ+, and disabled communities.

In 2023, we will design and deploy a qualitative survey, mainly in the format of focus groups. The exact number of focus groups and the make-up of each focus group will be scoped as the survey is being designed. The tentative plan is to conduct ten to twelve focus groups; participants will be selected to have a wide coverage of race/ethnicity, immigration, gender, age, disability status, income, as well as geographic locations in the city.

The project team will also partner with, and fund whenever possible, community-based organizations and minority and women-owned enterprises, to help us with outreach to diverse underserved communities.

### **Budgetary Impact Worksheet**

**Does this action change appropriations?**

**NO:** Skip this section

<b>Fund</b>	<b>Fund Center</b>	<b>Commitment Item</b>	<b>Functional Area</b>	<b>Funded Program</b>	<b>Grant</b>	<b>Sponsored Program</b>	<b>Amount</b>