

Exhibit A

PSU Regional Research Institute for Human Services

Scope of Work for the Portland Insights Study: Project Period: 1/1/2024 - 12/31/2027

The City of Portland Budget Office

The Regional Research Institute for Human Services (RRI) at PSU, in on-going collaboration with Portland's City Budget Office, will conduct another 4-year Portland Insights Study, which will have both quantitative and qualitative components. The continued goal of the Portland Insights Study is to help shape the Portland's organizational priorities across City Bureaus, create a feedback loop for program improvement, identify and understand critical emerging trends, track improvements and areas that need improvement, and bring objective information into planning discussions. 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 leadership and community partners, revise the initial 2022 Portland Insights Survey and administer it online via Qualtrics (or via phone or paper survey to best accommodate participant needs).
- In close collaboration City 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 or not the collected data and its interpretation make sense and are relevant.
- Provide written reports that include data findings and analysis.
- Provide results and key analytic figures to City, adhering to City's data privacy guidelines and 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 meetings, as needed, 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.
- Participate in meetings with Portland's City Budget Office and community partners to share lessons learned and recommendations for next steps.

QUANTITATIVE SURVEY: (January 2024 – December 2026)

The quantitative survey is conducted on a biennial basis. Within the context of this IGA, the surveys shall be conducted in the calendar years 2024 and 2026.

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 Bureau's and community member participation and input, assess which of the 2022 Portland Insights 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.
 - Coordinate with the Advisory Committee, including community advisors, to finalize and review survey items and layout.
- Create web and paper versions of the survey.
 - Program the web survey, using Qualtrics, in English, Spanish, Chinese, Vietnamese, Ukrainian, 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.portlandinsightsurvey.org). 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 six languages: English, Spanish, Chinese, Vietnamese, Ukrainian, 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 re communications/ distribution of the survey throughout Portland, Oregon.
 - 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-based organizations who will serve as data collectors/ canvassers to increase community participation/ engagement in the survey.
 - 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 non-English languages to conduct phone interviews.

- Receive and enter paper surveys into an electronic data file.
- Distribute \$100 gift cards through a drawing, selecting 50 survey completers.
- 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.
- Prepare a written report summarizing the findings.
- Provide summary data of all survey questions and data supporting any analysis of survey results, adhering to City's data privacy guidelines and in a format that allows City staff to create public-facing dashboards and/or online reports. No individual-level data will be transferred to the City.
- Store individual-level raw data at PSU, give access to City Budget Office staff to view the data, and produce additional summary data for future analysis beyond the termination of this IGA. PSU shall have designated staff who can access the data to provide City staff with future summaries.
- 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:

- **February, 2025:** A final report of the 2024 survey, which includes at a minimum, a summary of all efforts and accomplishments, summary of survey findings, comparison between selected 2022 and 2024 survey results 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.
- **December, 2026:** A final report of the 2026 survey, which includes at a minimum, a summary of all efforts and accomplishments, summary of survey findings, comparison among selected 2022, 2024, and 2026 survey results 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.

QUALITATIVE STUDY: (January 2025 - December 2027)

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 may be translated into five other languages in addition to English: Chinese, Vietnamese, Russian, Ukrainian, and Spanish.
- Recruit and/ or select focus group participants in collaboration with City staff and community partners. If appropriate, invite those who do not want to participate in a group conversation the option to participate in an individual, 1:1 interview (in-person or virtual).

- Produce a qualitative study plan.

Deployment of the qualitative study, at a minimum include:

- Conduct culturally sensitive and/or geographically specific focus groups, in partnership with community-based organizations.
- Anticipating 10 – 12 focus groups. 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 is provides.
- 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.

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.
- Produce a written report. Provide raw data to the City Budget Office.

Timeline – Quantitative and Qualitative Studies

Quantitative Survey task timelines are labeled with light blue, while qualitative focus group timelines are labeled with grey.

Activity/ date	Jan 2024	Feb 2024	March 2024	April 2024	May 2024	June 2024	July 2024	Aug 2024	Sept 2024	Oct 2024	Nov 2024	Dec 2024
IRB approval												
Design English quant survey												
Surveys translated into other languages												
Survey deployment												
Data analysis												

Activity/ date	Jan 2025	Feb 2025	March 2025	April 2025	May 2025	June 2025	July 2025	Aug 2025	Sept 2025	Oct 2025	Nov 2025	Dec 2025
Quant survey final report work												
IRB												
Design qual protocol/ questionnaire												
Questions translated into non-English languages												
Conduct focus groups / 1:1 interviews												
Data analysis												
Qualitative study report –draft and final version.												

Activity/ date	Jan 2026	Feb 2026	March 2026	April 2026	May 2026	June 2026	July 2026	Aug 2026	Sept 2026	Oct 2026	Nov 2026	Dec 2026
IRB approval												
Design English quant survey												
Surveys translated into other languages												
Survey deployment												
Data analysis												

Activity/ date	Jan 2027	Feb 2027	March 2027	April 2027	May 2027	June 2027	July 2027	Aug 2027	Sept 2027	Oct 2027	Nov 2027	Dec 2027
Quant Survey Final Report												
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.												

Project Budget

Below is the project budget for two two-year cycles (calendar year 2024-25 and calendar year 2026-27).

BUDGET ITEM	Salary month/ hourly	FTE/Hrs	Biennial Mos	CY 24-25 Budget	CY 26-27 Budget
Mary Oschwald, RRI, Principal Investigator	\$11,646	0.10	24	\$ 27,950	\$ 27,950

**Project oversight and coordination with City Budget Office	OPE @	57%		\$ 15,932	\$ 15,932
**PSU IRB application and contracts					
**Data collection oversight					
**Work closely with CELs/ community stakeholder groups/ assoc					
**Qualitative analysis lead					
**Assist with data analysis and report writing					
**Assist with focus group planning, implementation, analysis and reporting					
Debi Elliott, RRI, Co-Principal Investigator	\$10,608	0.15	24	\$ 38,189	\$ 38,189
**Project guidance, consultation, and survey development	OPE @	60%		\$ 22,913	\$ 22,913
**Assist with data collection oversight					
**Data entry oversight					
**Quantitative data cleanup					
**Data analysis					
**Final report preparation					
**Focus group planning, implementation, analysis and reporting					
Megan Cook, RRI, Research Assistant (includes 26-27 COLA)	\$ 5,111	0.20	24	\$ 24,533	\$ 26,495
**Manage day-to-day project operation; maintain data bases; community outreach	OPE @	65%		\$ 15,946	\$ 17,222
Ethan Sharygin, PSU Population Research Center, statistician	\$ 7,730	0.05	2	\$ 773	\$ 773
**Assist with statistical weight creation	OPE @	55%		\$ 425	\$ 425
Randy Morris, PSU Population Research Center, statistician	\$ 50	40.00		\$ 2,000	\$ 2,000
**Assist with statistical mapping_analysis and report writing	OPE @	0.09		\$ 180	\$ 180
Holly Hein, Office Specialist	\$ 4,426	0.03	12	\$ 1,593	\$ 1,721
**Document review, formatting, and editing	OPE @	85%		\$ 1,354	\$ 1,463
**Personnel management, payroll processing					
Cameron Mulder, RRI, statistician	\$50	200		\$ 10,000	\$ 10,000
Assist with statistical calculations and report writing	OPE @	9%		\$ 900	\$ 900
Tyson Vanover-Hill	\$5,871	0.05	6	\$ 1,761	\$ 1,902
** Web/ Qualtrics survey programming/ maintenance	OPE @	68%		\$ 1,198	\$ 1,293
Participant incentives_survey completers (50 x \$100 giftcards)				\$ 5,000	\$ 5,000
Hosting: food/ refreshments for 10 focus groups				\$ 2,750	\$ 2,750
Postage for mailing household survey				\$ 1,122	\$ 1,144
Supplies and copying				\$ 300	\$ 300
Hourly Staff	\$ 20	500		\$ 10,000	\$ 10,000

**Data entry -- Spanish translation into English ** Assist with quantitative data cleaning, summaries, presentation materials ** Assist with qualitative data cleaning and coding	OPE @ 9%	\$ 900	\$ 900
	Total Direct Costs	\$ 185,719	\$ 189,452
	PSU Local Government Indirect Cost Rate 26%	\$ 48,287	\$ 49,258
	Total Project Costs	\$ 234,006	\$ 238,710