MCHENRY COUNTY CONSERVATION DISTRICT
RESOLUTION #19-86

AUTHORIZING THE EXECUTION OF A CONTRACT FOR ATTITUDE AND INTEREST SURVEY WITH AQITY RESEARCH & INSIGHTS, INC FOR A COST NOT TO EXCEED $29,720 (RFQ #1019.10.01)

WHEREAS, the McHenry County Conservation District (hereinafter referred to as the "District"), is a conservation district organized and existing under the laws of the State of Illinois (70 ILCS 410); and

WHEREAS, AQity Research & Insights, Inc of Evanston, IL (hereinafter referred to as the "the Contractor") is a research company; and

WHEREAS, the Contractor is the best suited for the project as specified in the Request for Qualifications (RFQ) #1019.10.01; and

WHEREAS, the District is empowered to enter into contracts and take such other actions as may be necessary for the proper conduct of its affairs (70 ILCS 410/12); and

WHEREAS, the parties hereto have determined that it is in the best interest of the District and the public for the entities to cooperatively coordinate the implementation of an Attitude and Interest Survey of McHenry County Residents for the McHenry County Conservation District as outlined in the contract as presented to the Board and which is attached and made a part of the related project files.

NOW, THEREFORE BE IT RESOLVED, by the Board of Trustees of the District that it is necessary, desirable, and in the best interest of the District to execute the Contract, and the President and Secretary of the Board of Trustees are hereby authorized to execute this resolution and the President and Executive Director or her designee is authorized to execute said Contract and other necessary documents to execute the intent of this resolution.

IN WITNESS WHEREOF, this Resolution #19-86 has been executed this 26th day of November, 2019 by the President and attested by the Secretary of the Board of Trustees of the District.

Ayes: 4
Nays: 2
Absent: 1
Abstain: 0

Vernon Scacci, President
Board of Trustees

Carolyn Campbell, Secretary
Board of Trustees

Resolution #19-86
Page 1 of 1
MCHENRY COUNTY CONSERVATION DISTRICT
INDEPENDENT CONTRACTOR AGREEMENT
FOR MARKET RESEARCH SERVICES –
COMMUNITY ATTITUDE & INTEREST SURVEY OF MCHENRY COUNTY RESIDENTS

THIS AGREEMENT entered into by and between aQity Research & Insights, Inc. of Evanston, IL (hereafter the "Contractor") and the McHENRY COUNTY CONSERVATION DISTRICT (hereafter "District").

WHEREAS, Contractor will be performing professional market research services and work for the District as set forth in Exhibit A and Exhibit B;

WHEREAS, Contractor may have subcontractors, material suppliers and one or more employees engaged in the performance of said work; and

WHEREAS, Exhibit A and Exhibit B attached hereto sets forth the scope of the engagement of the Contractor (the "Market Research Services" or the "Work") and the terms of compensation therefore; and

WHEREAS, this Agreement, Exhibit A and Exhibit B constitute the Contract between the Contractor and the District;

WHEREAS, the Contractor shall be made payments for the work set forth in Exhibit A and Exhibit B as follows:
$9,200 or 1/3 of total cost, upon contract agreement;
$9,200 or 1/3 of total cost, upon notification that data collection has started;
$9,200 or 1/3 of total cost, upon delivery of final report and presentations;
for a total payment from the District not to exceed $27,600.

NOW, THEREFORE, in consideration of the mutual covenants and agreements herein contained, and other good and valuable consideration received and to be received, the Contractor hereby agrees:

1. Contractor will perform a Community Attitude & Interest Survey of McHenry County Residents in accordance with industry standard practices.

2. In performing the Community Attitude & Interest Survey of McHenry County Residents, the
Contractor agrees to comply with all applicable laws, regulations, and rules promulgated by any Federal, State, County, Municipal and or other governmental unit or regulatory body now in effect during the performance of the work. By way of example, the following are included within the scope of the laws, regulations and rules referred to in this paragraph, but in no way to operate as a limitation on the laws, regulations and rules with which Contractor must comply, are all forms of Workers Compensation Laws, all terms of the Equal Employment Opportunity Clause of the Illinois Fair Employment Practices Commission, the Illinois Preference Act, the Social Security Act, Statutes relating to contracts let by units of government, all applicable Civil Rights and Anti-Discrimination Laws and Regulations, and traffic and public utility regulations.

Contractor agrees to maintain the records and documents for projects of the District in compliance with the Freedom of Information Act, 5 ILCS 140/1 et seq. In addition, Contractor shall produce records which are responsive to a request received by the District under the Freedom of Information Act so that the District may provide records to those requesting them within the time frames required by law. If additional time is necessary to compile records in response to a request, then Contractor shall so notify the District and if possible, the District shall request an extension so as to comply with the Act. In the event that the District is found to have not complied with the Freedom of Information Act based upon Contractor’s failure to produce documents or otherwise appropriately respond to a request under the Act, then Contractor shall indemnify and hold the District harmless, and pay all amounts determined to be due including but not limited to fines, costs, attorneys’ fees and penalties.

3. The Contractor agrees that, to the fullest extent permitted by law, it shall waive any and all rights of contribution against the District and to indemnify and hold harmless the District and its officers, officials, employees, volunteers and agents from and against all claims, damages, losses and expenses, including, but not limited to, legal fees (attorney's and paralegal's fees, expert fees and court costs) arising out of or resulting from the performance of the Contractor’s work, provided that any such claim, damage, loss or expense is attributable to bodily injury, sickness, disease or death, or injury to or destruction of property, other than the work itself, including the loss of use resulting therefrom, or is attributable to misuse or improper use of trademark or copyright protected material or otherwise protected intellectual property, to the extent it is caused in whole or in part by any wrongful or negligent act or omission of the Contractor, any Subcontractor, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable. Such obligation shall not be construed to negate, abridge or otherwise reduce any other right to indemnity which the District would otherwise have. The Contractor shall similarly, protect, indemnify and hold and save harmless, the District, its officers, officials, employee, volunteers and agents against and from any and all claims, costs, causes, actions and expenses, including, but not limited to, legal fees, incurred by reason of Contractor’s breach of any of its obligations under, or Contractor’s default of any provisions of the Contract. The indemnification obligations under this paragraph shall not be limited in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the Contractor or any subcontractor under Workers’ Compensation or Disability Benefit Acts or Employee Benefit
Acts. Any limitation of liability, including but not limited to limitation on the nature of the claims that may be pursued or the amount that may be recovered, that is set forth in Exhibit A is hereby deleted.

The Contractor shall, to the satisfaction of the District, keep in force and effect insurance coverage of the types and amounts listed below at all times during the performance of the Work:

A. **Commercial General and Umbrella Liability Insurance**

Contractor shall maintain commercial general liability (CGL) and, if necessary, commercial umbrella insurance with a limit of not less than $1,000,000 each occurrence. If such CGL insurance contains a general aggregate limit, it shall apply separately to this location.

CGL insurance shall be written on Insurance Services Office (ISO) occurrence form CG 00 01 10 93, or a substitute form providing equivalent coverage, and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and advertising injury, and liability assumed under an insured contract (including the tort liability of another assumed in a business contract).

District shall be included as an insured under the CGL, using ISO additional insured endorsement CG 20 11 or a substitute providing equivalent coverage, and under the commercial umbrella, if any. This insurance shall apply as primary insurance with respect to any other insurance or self-insurance afforded to District.

B. **Business Auto and Umbrella Liability Insurance**

If applicable, Contractor shall maintain business auto liability and, if necessary, commercial umbrella liability insurance with a limit of not less than $1,000,000 each accident. Such insurance shall cover liability arising out of any auto including owned, hired and non-owned autos.

Business auto insurance shall be written on Insurance Services Office (ISO) form CA 00 01, CA 00 05, CA 00 12, CA 00 20, or a substitute form providing equivalent liability coverage. If necessary, the policy shall be endorsed to provide contractual liability coverage equivalent to that provided in the 1990 and later editions of CA 00 01.

C. **Workers Compensation Insurance**

If applicable, Contractor shall maintain workers compensation and employers liability insurance. The commercial umbrella and/or employers liability limits shall not be less than $1,000,000 each accident for bodily injury by accident or $1,000,000 each employee for bodily injury by disease.

D. **General Insurance Provisions**

1. **Evidence of Insurance**

Prior to beginning its work, Contractor shall furnish the District with a certificate(s) of
insurance and applicable policy endorsement(s), executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth above.

All certificates shall provide for 30 days’ written notice to District prior to the cancellation or material change of any insurance referred to therein. Written notice to District shall be by certified mail, return receipt requested.

Failure of District to demand such certificate, endorsement or other evidence of full compliance with these insurance requirements or failure of District to identify a deficiency from evidence that is provided shall not be construed as a waiver of Contractor’s obligation to maintain such insurance.

The District shall have the right, but not the obligation, of prohibiting Contractor from occupying the premises until such certificates or other evidence that insurance has been placed in complete compliance with these requirements is received and approved by the District.

Contractor waives all rights against the District and its officers, officials, employees, volunteers and agents for recovery of damages arising out of or incident to the Contractor’s use of the premises.

Failure to maintain the required insurance may result in termination of this agreement at the District’s option. Contractor shall provide certified copies of all insurance policies required above within 10 days of the District’s written request for said copies.

2. Acceptability of Insurers
For insurance companies which obtain a rating from A.M. Best, that rating should be no less than A VII using the most recent edition of the A.M. Best’s Key Rating Guide. If the Best’s rating is less than A VII or a Best’s rating is not obtained, MCCD has the right to reject insurance written by an insurer it deems unacceptable.

3. Cross-Liability Coverage
If Contractor’s liability policies do not contain the standard ISO separation of insured’s provision, or a substantially similar clause, they shall be endorsed to provide cross-liability coverage.

4. Deductibles and Self-Insured Retentions
Any deductibles or self-insured retentions must be declared to the District. At the option of the District, the Contractor may be asked to eliminate such deductibles or self-insured retentions as respects the District, its officers, officials, employees, volunteers and agents or required to procure a bond guaranteeing payment of losses and other related costs including but not limited to investigations, claim administration and defense expenses.
5. **Indemnification**
Contractor shall indemnify and hold harmless the District and its officers, officials, employees, volunteers and agents from and against all claims, damages, losses and expenses, including but not limited to legal fees (attorney’s and paralegals’ fees and court costs), arising from or in any way connected with (i) the conduct or management of the premises or of any business or activity therein, or any work or thing whatsoever done, or condition created in or about the premises during the term of this Contract; (ii) any act, omission wrongful act or negligence of Contractor or any of Contractor’s subcontractors (if applicable), or the partners, directors, officers, agents, employees, invitees or contractors of Contractor or Contractor’s subcontractors; (iii) any accident, injury or damage whatsoever occurring in or at the premises, except to the extent it is caused in part by a party indemnified hereunder. Such obligation shall not be construed to negate, abridge, or otherwise reduce any other right or obligation of indemnity which would otherwise exist as to any party or person described in this Paragraph. Contractor shall similarly protect, indemnify and hold and save harmless the Contractor, its officers, officials, employees, volunteers and agents against and from any and all claims, costs, causes, actions and expenses including but not limited to legal fees, incurred by reason of Contractor’s breach of any of its obligations under, or Contractor’s default of, any provision of the Contract.

6. **Independent Contractor**
It is mutually understood and agreed that the Contractor shall have the full control of the ways and means of performing the work referred to above and that the Contractor or its employees, representatives or subcontractors are in no sense employees of the District, it being specifically agreed that the Contractor bears the relationship of an independent Contractor to the District.

7. **Waiver**
Failure or delay on the part of either party to exercise any right, power, privilege, or remedy under this Agreement shall not constitute a waiver thereof. No modification or waiver by either party of any provision shall be deemed to have been made unless in writing. Waivers of a specific failure or delay shall not be construed as general waiver.

8. **Severability**
The provisions of this Agreement shall be severable and the invalidity of any provision or portion thereof shall not affect the enforceability of the remaining provisions.

9. **Non-Assignability**
Contractor shall not assign this Agreement or transfer, convey or otherwise dispose of any part therein or its right, title or interest therein or its power to execute the same, to any other person, company or corporation without the previous written consent of DISTRICT, which consent the DISTRICT may grant or withhold in its sole discretion.
This agreement shall be in full force and effect from the 4th day of December 2019 until April 30, 2020, or until such time as it is terminated by the District.

IN WITNESS WHEREOF, THE PARTIES have executed this Agreement this 4th day of December 2019.

MCHENRY COUNTY
CONSERVATION DISTRICT

[Signature]
12.9.19

Elizabeth S. Kessler
Executive Director
18410 US Highway 14
Woodstock, IL 60098
815.338.6223, ext. 233
EKessler@MCCDistrict.org
MCCDistrict.org

aQity Research & Insights, Inc.

[Signature]

Jeff Andreasen
President
820 Davis Street, Suite 502
Evanston, IL 60201
847-424-4171
j.andreasen@aqtyresearch.com
aqityresearch.com

FEIN #: 47-3975983
EXHIBIT A

Survey Approach

As outlined on pages 8-13 of the RFP, Aqity’s recommend approach for the MCCD countywide survey will reflect best practices in both design and data collection to ensure that we provide the District with an accurate and representative understanding of: Residents’ awareness and assessment of the District’s performance and progress; Updated feedback on their preferred open space and recreational activities and needs; Insights on specific visitor services, user fees, and other experiences at MCCD locations (e.g., access, perceived safety, maintenance and upkeep, staff service, etc.).

The Process will Include:
Kick-off Discussion and Survey Design: with MCCD team to clarify research objectives, review past survey questions and results, and identify new topics to test. Aqity will facilitate this discussion, listen to survey goals, and ask questions to ensure that needs are fully understood.

Aqity will develop a survey questionnaire customized to your specific objectives. This design process will be very collaborative, and we will be available to explain our recommended question approach and wording, as well as provide options to ensure that your data needs are met. The survey design typically includes two to three drafts before final questionnaire approval.

In addition to the customized questions, we will also include:

- Relevant questions from recent MCCD surveys to identify any shifts in opinion or priorities over time;

- Key metrics for benchmark comparisons to statewide data and from neighboring forest preserve districts. These include overall opinion ratings of the District, the value that your agency represents relative to its share of property taxes, satisfaction with your properties and facilities overall, etc.;

- Demographic questions to assist with the analysis and identify key subgroups within the community (e.g., region, age, gender, presence of children under age 18 in the household, length of residence in the County, race/ethnicity, recent MCCD usage/non-usage or visits, etc.).

Sampling and Data Collection: A hybrid mail, online, and phone survey approach that includes:

- Send a mail questionnaire to a random sample of McHenry County households and requesting their feedback via a pre-paid reply envelope addressed to Aqity Research. The mail questionnaire will also inform recipients how they can complete the survey online or by phone as alternatives. Any phone interviews will be administered by our in-house phone center in Evanston.

- Target the mail questionnaires to older residents (who tend to be more likely to reply via mail as opposed to online).

- Send postcard invitations to a separate sample of MCCD households, inviting them to complete the survey online or call Aqity Research toll-free to complete a phone interview or request a mail survey. Postcard reminders can also be sent to non-respondents who received the initial mail survey. If necessary, we will also follow up with non-respondents by phone to encourage them to complete a
phone survey or assist them in completing the survey online if they prefer.

- An additional Spanish version for both the online and mail survey modes will be available.
Invitations sent to the communities above will have extra instructions (in Spanish) on how one can access or request a Spanish language option.
- Also provide MCCD with an online survey link, which residents can access on the District website.
This will boost the amount of feedback, especially among anyone who was not in the random sample. We will process these “opt-in” survey respondents and include their results in our analysis, though these results will be reported separately from the random sample.

Sample Size:
A minimum of n=500 respondents for the countywide survey. This will provide an overall margin of error of about +/- 4% (at the 95% confidence level). This will be large enough to report on meaningful differences by region and subgroup.

Data Processing and Analysis: Once the target number of completions is achieved, we will carefully compare the survey respondents’ demographics to current US Census data for McHenry County. If necessary, we will weight the survey data on key demographics (e.g., region, gender, age, race/ethnicity, households with/without children, etc.) to align with Census targets. This weighting process is critical to ensure accurate results and analysis.

All programming, coding, data processing, weighting, analysis, and reporting is done in-house by our experienced staff. The analysis will be thorough, and we will focus on the key topics and segments as identified in the kick-off discussion (e.g., MCCD visitors vs. non-visitors, differences by age groups, facility and program priorities and any “gaps” that exist, etc.). We will provide the MCCD with banner tabs that show cross tabulations across these segments on each survey question.

Final Report and Presentations: The final report will include detailed findings on each question and include benchmark comparisons to nearby and statewide county conservation and forest preserve districts when available. It will also include an executive summary and clear, actionable recommendations. Two in-person presentations of the results will occur. The first to staff to get feedback; the second will be the final report presented to the MCCD Board of Trustees.

Summary of Deliverables:
1.) Survey questionnaire;
2.) Banner tables with survey results by key demographics, with meaningful differences indicated;
3.) A clean, formatted data file (in Excel);
4.) Comprehensive report (PowerPoint) with detailed results, executive summary, recommendations, and research methods.
EXHIBIT B

Project Timeline

Total Turnaround: Roughly two months. If we were to start with the kick-off discussion and survey design in January, we would have results to you around the end of March 2020.

• 1 week for survey programming, website setup, printing and mailing hard copy surveys and invitations;

• 4 weeks for data collection (initial invites and responses, follow-up reminders, phone calls to non-respondents after two invites);

• 2 weeks for data processing, coding, cleaning, and weighting;

• 2 weeks for analysis and report writing, followed by in-person presentations to the MCCD;
Proposal to the McHenry County Conservation District:
2020 Countywide Attitude & Interest Survey

Submitted by aQity Research & Insights, Inc.

November 2019
Wendy Kummerer  
Director of Marketing & Communications  
McHenry County Conservation District  
18410 U.S. Highway 14  
Woodstock, IL 60098  

November 18, 2019  

Dear Wendy:  

We are delighted to have the opportunity to submit a proposal for the upcoming Attitude & Interest Survey for the McHenry County Conservation District (MCCD).  

As you may know, the aQity Research team comes from Richard Day Research, the firm that conducted the 2000 voter survey for the MCCD, which provided the insights and predicted vote outcomes that helped the District pass its 2001 bond referendum for land acquisition. I personally managed that project and recall our strong partnership with the MCCD.  

We hope to once again be your thought partner during this upcoming process and will be committed to providing the reliable and actionable insights you seek to better understand McHenry County residents' opinions of the District and its mission, their recreational and open space priorities, and any unmet needs.  

Attached is our proposal in response to the information requests outlined in your RFP. I am confident that given our high standards for accuracy and insights, aQity Research represents the best value for the research dollar. We deliver this value by:  

- Using best practices to ensure an accurate representation of the entire county (including both MCCD users and non-users, all age groups and regions, and various socio-economic and ethnic groups);  
- Developing a customized design specific to your needs while still providing trending on key questions from past MCCD surveys, along with relevant, meaningful benchmark comparisons to similar districts;  
- Providing a thorough analysis and reporting with clear, actionable insights that will help inform important decisions.  

Again, we greatly appreciate this opportunity. We will be 100% committed to this project and its outcome. Please let me know if you have any questions. I look forward to hearing from you.  

Best Wishes,  

Jeff Andreasen  
President  

aQity Research & Insights Proposal to the McHenry County Conservation District  
November 18, 2019
aQity Research and Insights Proposal to
the McHenry County Conservation District

1. Qualification Form
Name of Organization: aQity Research & Insights, Inc.
Street Address: 820 Davis Street, Suite 502
City, State, Zip: Evanston, IL 60201
Telephone: 847-424-4171
Fax: 847-328-8995
E-mail: j.andreasen@aqtyresearch.com
Web Site: www.aqtyresearch.com
Mailing Address (if different from above): (same)
Contact Person: Jeff Andreasen, President
Submittal is for: _ Parent Company; _ Subsidiary; _ Division; _ Branch Office
Type of Organization: _ Corporation; _ Partnership; _ Individual; _ Joint Venture; _ Other
For joint ventures, submit a copy of joint venture agreement with this form.
How many years has the organization been in business? 4 years
How many years has the organization been in business under its present name: 4 years
Under what other names, if any has the organization operated? Richard Day Research, Inc.; Market Probe, Inc.
Is the organization tax exempt under Section 501 (c)(3)? _ Yes _ No
FEIN or Tax Exemption Number: 47-3975983
If yes, please attach a copy of IRS Determination Notification
List key persons/officers (owners, partners, directors, president, vice president, secretary, treasurer):

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>% Ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeff Andreasen</td>
<td>President/Owner</td>
<td>100%</td>
</tr>
</tbody>
</table>

Which state is the organization incorporated in: Illinois

Is the organization authorized to do business in the State of Illinois? X Yes; No.

**Partnerships**

If the organization is a partnership, indicate the name of each partner and the percentage of interest held by each:

<table>
<thead>
<tr>
<th>Name of Partners</th>
<th>% Interest</th>
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<tbody>
<tr>
<td>N.A.</td>
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</table>

**Sole Proprietorships**

a. The organization is a sole proprietor and is not acting in any representative capacity on behalf of any beneficiary:

   X Yes No (If no, complete items b. and c. of this section.)

b. If the sole proprietorship is held by an agent(s) or a nominee(s), indicate the principal(s) for whom the agent or nominee holds such interest.

   Name(s) of Principal(s)
   N.A.

c. If the interest of a spouse or any other party is constructively controlled by another person or legal entity, state the name and address of such person or entity possessing such control and the relationship under which such control is being or may be exercised.

   N.A.

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aQty Research & Insights Proposal to the McHenry County Conservation District pg. 4
November 18, 2019
2. Claims and Suits

If the answer to any of the question below is YES, provide a brief description or explanation.

a. Are there services, programs and activities in which the organization was issued notice of default on any contract awarded to it in the last ten (10) years?
   ___ YES  ___ NO

b. Are there any legally filed judgments, claims (EEO damages, liquidated damages, or other), arbitration proceedings or suits pending or outstanding against the organization or its officers?
   ___ YES  ___ NO

c. Within the past five years has the organization been a party to any lawsuits or arbitration proceedings with regard to any services, programs, or activities?
   ___ YES  ___ NO

d. Has any key person with the organization or its predecessor ever been convicted of or charged with any state or federal crime (excluding traffic violations), including, but not limited to, child endangerment, harassment, embezzlement, theft, forgery, bribery, falsification or destruction of records, receipt of stolen property, criminal antitrust violations, bid-rigging or bid-rotating?
   ___ YES  ___ NO

e. Within the past five years, has the organization been investigated or assessed penalties for any county, state or federal statutory or administrative violations?
   ___ YES  ___ NO
Since 1993, the team at aQity Research has conducted dozens of community surveys for public agencies, primarily park districts and forest preserve/conservation districts. These include studies that we conducted as part of Market Probe and Richard Day Research, Inc. across several Illinois agencies (listed below):

<table>
<thead>
<tr>
<th>aQity Research &amp; Insights</th>
<th>Market Probe</th>
<th>Richard Day Research</th>
</tr>
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<tbody>
<tr>
<td><strong>Local Agencies</strong></td>
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<tr>
<td>Mt. Prospect PD (2017)</td>
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<tr>
<td>City of McHenry (2017)</td>
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<tr>
<td>Lake Bluff PD (2017)</td>
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<tr>
<td>Elementary School District 65 (2017)</td>
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<tr>
<td>Naperville PD (2017)</td>
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<tr>
<td>Village of Lake Bluff (2017)</td>
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<tr>
<td>Northshore School District 112 in Highland Park (2017)</td>
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<tr>
<td>Glenview PD (2017)</td>
<td></td>
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<tr>
<td>St. Charles PD (2016)</td>
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<tr>
<td>Wheeling PD (2015)</td>
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<tr>
<td>Wilmette PD (2015)</td>
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<tr>
<td><strong>Countywide</strong></td>
<td></td>
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<tr>
<td><strong>Statewide</strong></td>
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Our team is recognized by these agencies as being a thought partner and not just a research vendor. Many firms can provide data; we provide insights. Our surveys are customized for each client to reflect their specific needs. We then use a wide range of analytical tools to dig deeper and understand the meaningful relationships, the drivers of attitudes and behaviors, and the reasons behind key metrics and opinions. Finally, we deliver the results with clear, actionable recommendations to help clients make decisions with confidence.
Below are references and contact information for recent park agency community surveys and needs assessments that aQity has conducted, including McHenry County agencies in Crystal Lake and the City of McHenry. **I encourage you contact the references to better understand the service and value we provide.**

<table>
<thead>
<tr>
<th>Agency</th>
<th>Contact Information</th>
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</thead>
</table>
| 2019 Crystal Lake Park District Community Survey | Jason Herbster (Executive Director)  
jherbster@crystallakeparks.org  
1 East Crystal Lake Ave., Crystal Lake, IL 60014  
815-459-0680, ext. 1203 |
| 2017 City of McHenry Parks & Recreation Community Wide Survey | Bill Hobson (Director of Parks and Recreation)  
bhobson@ci.mchenry.il.us  
3636 Municipal Drive, McHenry, IL 60050  
815-363-2159 |
| 2019 Lake County Forest Preserve District Countywide Survey | Alex Ty Kovach (Executive Director)  
akovach@lcfpd.org  
Katherine Hamilton Smith (Director of Public Affairs & Development)  
Khamilton-smith@lcfpd.org  
1895 West Winchester Road, Libertyville, IL 60048  
847-968-3380 |
| 2016 St. Charles Park District Community Survey | Holly Cabel (Director of Parks and Recreation)  
hcabel@stcparks.org  
8 North Ave., St. Charles, IL 60174  
630-513-6200 |
| Batavia Park District Focus Groups and Community Surveys | Allison Niemela (Executive Director)  
allisonn@bataviaparks.org  
327 Wilson St., Batavia, IL 60510  
630-879-5235, ext. 2017 |

**aQity Research & Insights Proposal to the McHenry County Conservation District**  
November 18, 2019
4. McHenry County Experience

As described above, aQity Research has conducted two recent surveys for agencies in McHenry County.

➢ We recently completed a community-wide survey for the Crystal Lake Park District, with responses from 467 households. The survey was conducted via online and mail options.

The findings addressed key research objectives to gauge overall value and satisfaction with the Park District, its facilities, parks and programs, as well as community events. It also identified the core group of "non-users" who tend to hold less favorable views toward the District and identified their barriers or reasons for non-usage (as well as other local sources for their fitness and recreational needs).

The survey also tested the community's willingness-to-pay for a potential recreation center and identified not only the level of support but also profiled those most likely to support or oppose such an initiative. We also identified the strongest reasons for and against this proposal.

Finally, the survey identified the preferred communication channels both for the Park District, as well as the sources that residents rely on most for generally local news, information or updates. We profiled which methods are most effective or preferred by key segments to help the District with its outreach strategies.

The results were presented at a public Park District meeting this past August. The total cost was $31,000.

➢ We also completed focus groups, a community wide survey, and (working with Heller & Heller Associates) delivered a program inventory and analysis to help the City of McHenry Parks and Recreation Department understand community support for expanding its facilities and programming opportunities.

aQity recruited and conducted two focus groups, one with local stakeholders, one with area residents. We followed up with a quantitative community-wide survey of just over 400 residents to gauge their awareness and usage of the agency's facilities and programs, identify unmet needs, and test willingness-to-pay questions. The survey showed support for a potential referendum, and the City placed a bond referendum on the 2018 ballot.

Unfortunately, the local school district also had an even larger bond referendum on the same ballot (which passed) but as a result, the Parks and Recreation referendum was defeated. Still, our focus groups and quantitative survey results clearly indicate strong support for improvements and expanded Department facilities and programs, and the City may try again in the near future.

➢ The total cost for the community survey and the focus groups was $35,600.
5. Insurance and Indemnification

aQity's insurance coverage includes:

- Comprehensive Business Liability insurance ($2M for each occurrence, $4M aggregate);
- Auto insurance ($1M bodily injury and $1M property);
- Workers' Compensation and Employee Liability coverage ($1M per accident, $1M disease per employee);
- Professional Liability Errors and Omissions coverage ($1M each claim, $1M aggregate).

Certificates of Insurance can be provided upon award of the contract.

6. Organization and Key Personnel

The project team assigned to the MCCD survey has worked on many similar projects. This team will include:

Jeff Andreasen (President) who will be your primary contact for this study. He is responsible for research and consulting services to public policy clients. For the past twenty-five years, he has designed, executed, analyzed, and consulted on needs assessment and community attitude and interest surveys for many forest preserve and conservation districts, along with park agencies throughout Illinois (formerly with Richard Day Research and Market Probe).

Most recently, Jeff has conducted a countywide survey for the Lake County Forest Preserve District, and community surveys for park agencies in Crystal Lake, the City of McHenry, Batavia, St. Charles, Buffalo Grove, Oak Park, Highland Park, Lake Bluff, Naperville, Morton Grove, Mt. Prospect, Fox Valley (Aurora), Bartlett, Glenview, Wilmette, Wheeling, and statewide survey research (qualitative and quantitative) for the IAPD. He has also conducted focus groups and statistically valid community surveys for park agencies in Elmhurst, Bensenville, Northbrook, Grayslake, Glencoe, and Decatur; countywide forest preserve/conservation districts in Lake, McHenry, DuPage, and Will counties; and state agencies, including the Illinois Department of Public Health and the Illinois Department of Transportation.

Jeff has co-authored chapters in two books on Chicago mayoral politics and contributed articles to several publications including Public Opinion Quarterly. He has a degree in Urban and Regional Planning from the University of Illinois at Urbana (1983).

Tessa Andreasen (Project Manager) will manage the day-to-day survey processes. She will be responsible for each stage of the study, thoroughly monitoring the research design and execution to ensure complete quality control and efficient processing.
Tessa has over six years of project management experience with park district surveys, and most recently managed community surveys for Naperville, McHenry, Northbrook, Wheeling, Wilmette, Fox Valley and St. Charles Park Districts. She was also responsible for our recent 2017 community survey for North Shore School District 112, as well as three statewide surveys for the IAPD (one of residents, and two of IAPD member agencies).

Tessa's research experience extends beyond community surveys for park districts. She is responsible for large scale projects for several financial services companies, including Fidelity, T. Rowe Price, and Voya. These studies include in-depth surveys with consumers and corporate decision-makers on a variety of topics. These large clients rely on Tessa to consistently execute and deliver critical insights. She likewise will deliver the same skills and attention to detail to the MCCD research.

Tessa has an BA in Music Education from the University of Illinois (Urbana).

**Joanna Surma** (Research Analyst) will assist in the data processing, testing, and analysis, as well as the research design and implementation. Over the past three years she has worked on community and voter surveys for the Crystal Lake, Batavia, Morton Grove, Lake Bluff, Batavia, Mt. Prospect, St. Charles, Glenview, and Fox Valley park districts.

Joanna received her M.A. in Political Science and holds bachelor's degrees in International Studies, Political Science, and History from Loyola University (Chicago).

**Jim Scholle** (Data Collection Supervisor) is responsible for the aQity Research call center and data processing team in Evanston. He has been with aQity Research (and formerly Market Probe and Richard Day Research) for fourteen years and has managed the data collection for several park districts and conservation/forest preserve districts.

Jim will be responsible for any phone interviewing, including training the interviewers and monitoring their work to ensure it meets our high standards for quality and insights. Jim will also oversee much of the data processing, including open-ended responses from residents to better understand their expressed needs and priorities from the District.

He has a degree in Speech and Communication from the University of St. Thomas (St. Paul, MN).

### 7. Proposed Fee

The estimated cost for the recommended survey approach outlined below is $29,720. This includes everything from the initial kick-off discussion and questionnaire design, through the final report and presentation to you and your Board of Trustees. No additional expenses or reimbursements are expected.
8. Proposed Timeline and Approach

Our recommend approach for the MCCD countywide survey is outlined below. It reflects best practices in both design and data collection to ensure that we provide the District with an accurate and representative understanding of:

- Residents' awareness and assessment of the District's performance and progress;
- Updated feedback on their preferred open space and recreational activities and needs;
- Insights on specific visitor services, user fees, and other experiences at MCCD locations (e.g., access, perceived safety, maintenance and upkeep, staff service, etc.).

Ultimately, this information will allow you and your Board to clarify priorities for resource allocation, improve communications and awareness (especially among non-visitors/non-users), and ultimately generate a greater sense of value among residents.

Kick-off Discussion and Survey Design: The first step will be a kick-off meeting with you and your team to clarify research objectives, review past survey questions and results, and identify new topics to test. We will facilitate this discussion, listen carefully to your goals, and ask questions to ensure that we fully understand your needs.

From this meeting, aQty will develop a survey questionnaire customized to your specific objectives. This design process will be very collaborative, and we will be available to explain our recommended question approach and wording, as well as provide options to ensure that your data needs are met. The survey design is an iterative process that typically includes two to three drafts before final questionnaire approval.

Assume a 12- to 15-minute questionnaire. Our careful design approach will have an eye toward the end goals to ensure that the analysis delivers on your research needs.

- We find that many surveys for other agencies too often identify high levels of support for facility improvements or opportunities that are, in fact, merely "nice-to-have" items. They are often lower priorities relative to other needs, or items for which residents are unwilling to pay. As a result, these findings can be very misleading. We make it a point to distinguish the "must-have" vs. "nice-to-have" features that will ensure success.

- We also find that many surveys over-represent existing users and visitors and lack the perspective of non-visitors (who represent your greatest opportunity for increasing usage and engagement). We take a more thorough and representative sampling approach to ensure that we have enough of this important segment included, and report on their barriers to usage as well as their preferred communication channels.

As part of the survey design, we strongly recommended including some key open-ended questions to allow residents to share their perspectives in their own words. These might include feedback on the MCCD's strengths and improvement opportunities, how the District can serve residents better, or what types of facilities, improvements, or programs they seek. We will code these responses for analysis.
In addition to the more customized questions, we will also include:

- Relevant questions from recent MCCD surveys to identify any shifts in opinion or priorities over time;

- Key metrics for benchmark comparisons to statewide data and from neighboring forest preserve districts. These benchmarks include overall opinion ratings of the District, the value that your agency represents relative to its share of property taxes, satisfaction with your properties and facilities overall, etc.;

- Demographic questions to assist with the analysis and identify key subgroups within the community (e.g., region, age, gender, presence of children under age 18 in the household, length of residence in the County, race/ethnicity, recent MCCD usage/non-usage or visits, etc.).

**Sampling and Data Collection:** We recommend a hybrid mail, online, and phone survey approach, which includes:

- Sending a mail questionnaire to a random sample of McHenry County households and requesting their feedback via a pre-paid reply envelope addressed to aQity Research. The mail questionnaire will also inform recipients how they can complete the survey online or by phone as alternatives. Any phone interviews will be administered by our in-house phone center in Evanston.

  We can target the mail questionnaires to older residents (who tend to be more likely to reply via mail as opposed to online).

- We will send postcard invitations to a separate sample of MCCD households, inviting them to complete the survey online or call aQity Research toll-free to complete a phone interview or request a mail survey. Postcard reminders can also be sent to non-respondents who received the initial mail survey.

- If necessary, we will also follow up with non-respondents by phone to encourage them to complete a phone survey or assist them in completing the survey online if they prefer.

We recommend this hybrid approach to ensure that all resident segments are sufficiently represented and encouraged to respond. There is no longer a single method that ensures a representative sample by itself:

- Typically, only older and long-term residents tend to have landline phones. They are also generally less responsive to online surveys.

- Conversely, younger adults, newer residents, and lower-income residents tend to be cell-only households, meaning a phone-only approach will under-represent this segment. Younger adults also demonstrate very low response to mail surveys, so an online option is critical to include their input.
While this hybrid survey approach can add some costs to the overall project, we take these additional steps because they help ensure a more representative (and accurate) sample than larger (yet skewed) samples. Our commitment to all of our clients is to provide accurate, objective insights to help inform your decisions.

We will also need to accommodate the Latino population in the County.

- US Census data from 2017 shows that roughly 12% of County residents are Latino, with the highest concentrations in Harvard (47% Latino) and Woodstock (22%), followed by Lake in the Hills and the City of McHenry (14% each).

- Once the questionnaire is finalized, we will translate a Spanish version for both the online and mail survey modes. Invitations sent to the communities above will have extra instructions (in Spanish) on how one can access or request a Spanish language option.

- Again, our goal is to accommodate specific needs to ensure that all sampled households have options to respond, including offering the survey in their preferred language.

In terms of sample size, we recommend a minimum of n=500 respondents for the countywide survey. This will provide an overall margin of error of about +/- 4% (at the 95% confidence level). This will be large enough to report on meaningful differences by region and subgroup. For added perspective on sample size:

- Our 2000 survey for the District included a sample of 500 voters, and accurately predicted the level of support estimated for the 2001 land acquisition referendum (which passed).

- For the Lake County Forest Preserve District (with more than twice as many households in Lake County as in McHenry County) we typically complete n=600 surveys. With this sample size and our custom approach, we helped the LCFPD pass five consecutive bond referenda between 1993 and 2008. Our current survey for the District also includes a sample of 600 residents.

With a large sample of 500 McHenry County residents, we will be able to provide detailed profiles of those most and least favorable toward the District, differences in activity and facility preferences, users vs. non-users, etc. It will also provide rich open-ended feedback on the reasons driving their opinions and priorities (to help clarify your outreach and messaging efforts).

We can also supplement the random sample by providing the MCCD with the online survey link, which residents can access on the District website. This will boost the amount of feedback, especially among anyone who was not in the random sample. We will process these "opt-in" survey respondents and include their results in our analysis, though these results will be reported separately from the random sample.
aQity will touch base with you regularly during the data collection stage to discuss response rates, or whether additional reminders or follow-ups are needed. We will also have an online portal that you can access to see how many surveys have been entered/processed real-time.

**Data Processing and Analysis:** Once the target number of completions is achieved, we will carefully compare the survey respondents’ demographics to current US Census data for McHenry County. If necessary, we will weight the survey data on key demographics (e.g., region, gender, age, race/ethnicity, households with/without children, etc.) to align with Census targets. This weighting process is critical to ensure accurate results and analysis.

All programming, coding, data processing, weighting, analysis, and reporting is done in-house by our experienced staff. The analysis will be thorough, and we will focus on the key topics and segments as identified in the kick-off discussion (e.g., MCCD visitors vs. non-visitors, differences by age groups, facility and program priorities and any “gaps” that exist, etc.).

We will provide the MCCD with banner tabs that show crosstabulations across these segments on each survey question.

**Final Report and Presentations:** The final report will include detailed findings on each question.

- While some research firms simply report the overall numbers and provide the crosstabs separately, we feel that it is our job to call out those meaningful differences on each question to develop clear profiles of those who feel the MCCD represents a good vs. poor value, or who express specific interests or priorities for potential District improvements or programs.

The report will include benchmark comparisons to nearby and statewide county conservation and forest preserve districts when available. It will also include an executive summary and clear, actionable recommendations.

We will provide two in-person presentations of the results. The first might be to your team and staff to get your feedback; the second will be the final report presented to the MCCD Board. Given our proximity to Woodstock, if additional meetings or presentations are needed, we can easily accommodate.

**Summary of Deliverables:**

- Survey questionnaire;
- Banner tables with survey results by key demographics, with meaningful differences indicated;
- A clean, formatted data file (in Excel);
- Comprehensive report (PowerPoint) with detailed results, executive summary, recommendations, and research methods.
As with all of our clients, we view this opportunity as more than just a project; we consider it a partnership. After the results are presented, we will remain available for unlimited phone consultation to answer questions, provide additional insights, discuss research-related items for the strategic planning process, etc.

**Project Timeline:** Once the questionnaire is finalized and approved by the MCCD, assume the following:

- 1 week for survey programming, website setup, printing and mailing hard copy surveys and invitations;
- 4 weeks for data collection (initial invites and responses, follow-up reminders, phone calls to non-respondents after two invites);
- 2 weeks for data processing, coding, cleaning, and weighting;
- 2 weeks for analysis and report writing, followed by in-person presentations to the MCCD;
- **Total Turnaround:** Roughly two months. If we were to start with the kick-off discussion and survey design in January, we would have results to you around the end of March 2020.

**Conclusion: Why Choose aQity Research?**

Many firms provide community surveys, so why do agencies partner with aQity Research? Based on their feedback, our key differentiators are:

- **We go beyond the obvious.** We provide insights, not just numbers. Our analysis and reporting are recognized as being more in-depth, more thorough, and easy to understand. We identify the trends behind the data and explain what they mean. As a result, clients find our reports to be much more strategic and helpful.

  Attached with this proposal are a couple of recent reports that aQity has presented to other park agencies. I strongly encourage you to review and compare these to other reports to understand the added level of analysis and insight we provide.

- **We sweat the details.** The survey findings will be used to help inform critical decisions, so they need to be reliable and accurate.

  During each stage, from survey design and sampling through analysis and reporting, we are focused on making sure that the research is done correctly. We know the pitfalls that others sometimes overlook, and we have developed and rely on best practices to ensure complete confidence in the results.
- **This is a partnership, not a project.** We are committed to making sure that our survey findings are deemed reliable and can be leveraged over the long term.

  For the MCCD, this means that our relationship does not end when the final deliverables are presented. We remain available for phone consultation to answer questions, provide follow-up analysis, discuss results with you and/or your consultants, consult on messaging and communications strategy, etc.

  Given the need for accurate and reliable information, we are confident that our approach will yield far greater value and the clear, actionable insights that you seek.

  Thank you again for this opportunity to partner with the McHenry County Conservation District. Please let us know if you have any questions. We look forward to hearing from you.