

Assessment of the Ocean and Coastal Economy in Massachusetts
RFR# ENV 06 CZM 09
Amendment to Scope of Work
25 April 2006

Telephone Survey of Business Owners in the Massachusetts Coastal Zone

Methodology

As a complement to the overall “Assessment of the Ocean and Coastal Economy” project currently underway in FY ’06, UMass will design a survey questionnaire, conduct a telephone survey of 500 business owners in the Massachusetts Coastal Zone, analyze key results and integrate findings with Written Report I- “Assessment of the Coastal and Marine Economies of Massachusetts”.

Task One: Survey Design

In close consultation with CZM, UMass will create a survey questionnaire to explore the relationship between the marine and coastal economy and business owners located in the coastal zone. A draft survey questionnaire is attached, with a summary of questions by subject area provided, as follows.

Subject Areas and Draft Questions–

Sector Identification

- Does the business offer marine or coastal-related services and products? If marine or coastal-related, identify which sector it belongs to. Marine sectors shall correspond with the industry definition utilized throughout the project.
- What is the size of the establishment (by number of employees)? What are the near-term growth expectations (by number of new hires)?

Labor force

- From where do companies in the coastal zone draw their workforce? Is labor recruited in or out of coastal zone region? In or out of state? Do workers live in the coastal zone or do they commute from outside of the region?

Relationships with marine economy businesses

Goal – examine the nature and degree of marine cluster business relationships

- Does the business have supplier or sales relationships with marine-related sectors? If so, to what degree?
- Where are primary business relationships located? Are customers and suppliers primarily located in the coastal zone? Are they located in-state or out-of-state?

Business Needs and Pressures

- What are the primary barriers to company expansion or retention? Are business needs and pressures related to the coastal zone location? In what way?

Task Two: Conduct Telephone Survey

The UMass Donahue Institute proposes to survey a stratified random sample of the universe of marine-related businesses located in the Massachusetts coastal zone, as defined in the project's methodology by NAICS code. UMDI proposes to identify firms through use of the Dun and Bradstreet (D & B) database. The D & B database contains the names of the principal contacts at establishments in the coastal zone. We estimate that approximately 6,000 contacts will be required to obtain 500 valid responses.

Upon finalization of the survey instrument, the process of surveying companies will take approximately two-to-three weeks.

Task Three: Analyze Key Results

Upon completion of the survey, UMDI will undertake a statistical analysis of the survey findings. A description of the survey methodology, major findings and a complete survey instrument will be drafted and appended to the final report.

Task Four: Integrate Findings with Written Report I- "Assessment of the Coastal and Marine Economies of Massachusetts".

Key findings from the business survey will be integrated throughout Report I, "Assessment of the Coastal and Marine Economies of Massachusetts", as appropriate.

Schedule and Deliverables:

- | | |
|--|---------------|
| 1. Draft Survey Questionnaire | May 4, 2006 |
| 2. Final Survey Questionnaire | May 12, 2006 |
| 3. Dataset (Excel) of survey responses | June 15, 2006 |
| 4. Survey Report
(Methodology, Questionnaire and Analysis, as Appendix to Written Report I-
"Assessment of the Coastal and Marine Economies of Massachusetts") | June 26, 2006 |

**University of Massachusetts Donahue Institute
Pricing Proposal – May 2006**

**Massachusetts Office of Coastal Zone Management – Assessment of the
Massachusetts Coastal and Ocean Economy**

Item	Labor Category	Rate	Hours	Cost
Task 1 – Develop Survey Instrument and Methodology				
	Senior Consultant	\$177.32	5	\$887
	Dr. Michael Goodman		5	
	Consultant	\$90.67	12	\$1,088.04
	Rebecca Loveland		12	
	Junior Consultant	\$75.00	8	\$600.00
	Mathew Hoover		8	
Total Labor Cost				\$2,575
Total Cost				\$2,575

Task 2 – Implement Telephone Survey				
	Consultant	\$90.67	12	\$1,088
	Rebecca Loveland		12	
	Junior Consultant	\$75.00	7	\$525
	Mathew Hoover		7	
Total Labor Cost				\$1,613
Telephone Call Center Costs				\$15,000
Total Cost				\$18,226

Item	Labor Category	Rate	Hours	Cost
Task 3 – Analyze Survey Results and Prepare Appendix Report				
	Consultant	\$90.67	24	\$2,176
	Rebecca Loveland		24	
	Junior Consultant	\$75.00	40	\$3,000
	Mathew Hoover		40	
	Graduate Associate	\$29.97	20	\$599
Total Labor Cost				\$5,775
Total Cost				\$5,775

Task 4 – Incorporate Results Into Full Report				
	Consultant	\$90.67	31	\$2,811
	Rebecca Loveland		31	
	Graduate Associate	\$29.97	20	\$599
Total Labor Cost				\$3,410
Total Cost				\$3,410

TOTAL COST **\$29,986**

NOTE - Labor rates include 10 percent overhead, fringe benefit costs, and all other indirect costs.