

Memorandum



Date October 31, 2014

To Honorable Mayor and Members of the City Council

Subject 2014 City of Dallas Community Survey Findings

Attached is a briefing with the results of the latest Community Survey that was conducted this summer.

We value the citizen feedback the survey provides, and I am encouraged that the results are positive. Chris Tatham with ETC Institute (the vendor that conducted the survey) will be with us on November 5th to discuss the results.



A.C. Gonzalez
City Manager

c: Warren M.S. Ernst, City Attorney
Craig D. Kinton, City Auditor
Rosa A. Rios, City Secretary
Daniel F. Solis, Administrative Judge
Ryan S. Evans, First Assistant City Manager
Eric D. Campbell, Assistant City Manager

Jill A. Jordan, P.E., Assistant City Manager
Mark McDaniel, Assistant City Manager
Joey Zapata, Assistant City Manager
Jeanne Chipperfield, Chief Financial Officer
Sana Syed, Public Information Officer
Elsa Cantu, Assistant to the City Manager – Mayor & Council

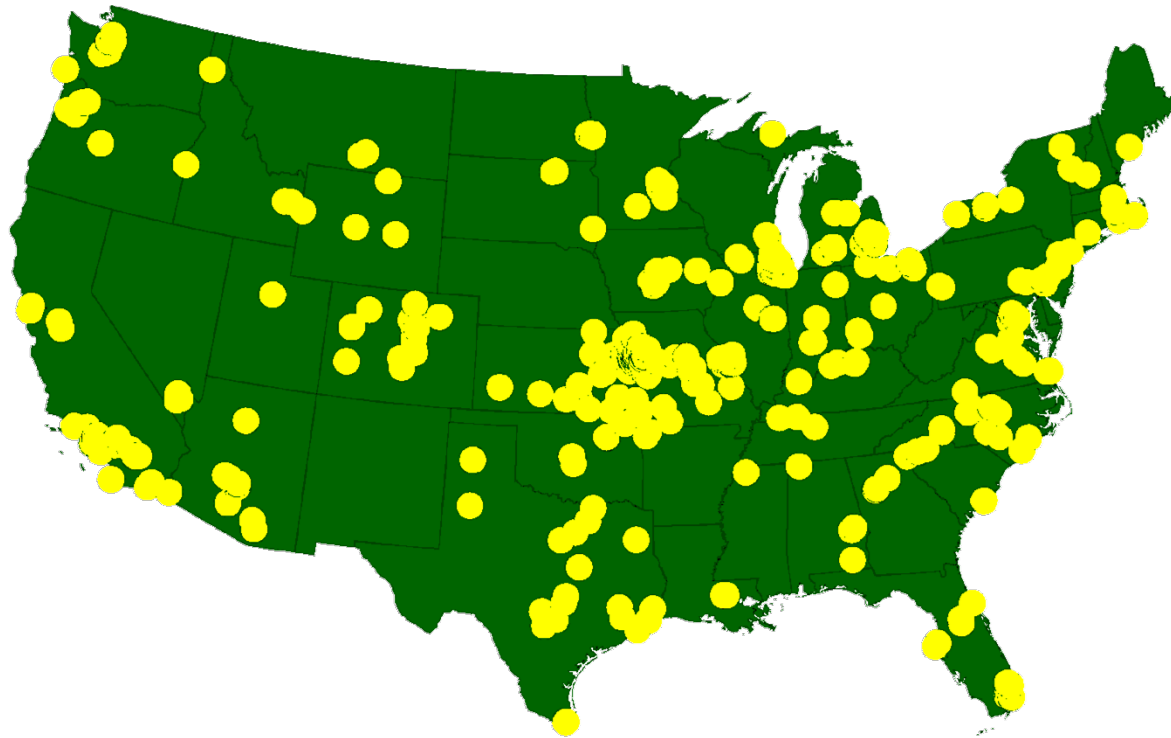
2014 City of Dallas Community Survey Findings



November 5, 2014

A National Leader in Market Research for Local Governmental Organizations

...helping city and county governments gather and use survey data to enhance organizational performance for 30 years



More than 1,850,000 persons surveyed since 2006 for more than 800 cities in 48 states, including 11 of the 20 largest US cities and 10 of the 20 largest US counties.

Communities with Populations Above 500,000 in ETC Institute's Database

- Dallas, TX
- San Antonio, TX
- Austin, TX
- Las Vegas, NV
- Detroit, MI
- Boston, MA
- Miami-Dade County, FL
- Seattle, WA
- San Diego, CA
- Columbus, OH
- Oklahoma City, OK
- Houston, TX
- Indianapolis, IN
- Charlotte, NC
- Nashville, TN
- Fort Worth, TX
- Denver, CO
- New York, NY
- El Paso, TX
- Tucson, AZ
- Portland, OR

**ETC Institute
maintains data
for 21 of the 31
US cities with
populations
above 500,000**

Agenda

- **Purpose**
- **Survey methodology**
- **Bottom line up front**
- **Major findings**
- **Summary and conclusions**
- **Questions**

Purpose

- **Gather input from residents to objectively assess the quality of City services**
- **Track the City's performance over time**
- **Help identify opportunities for improvement**

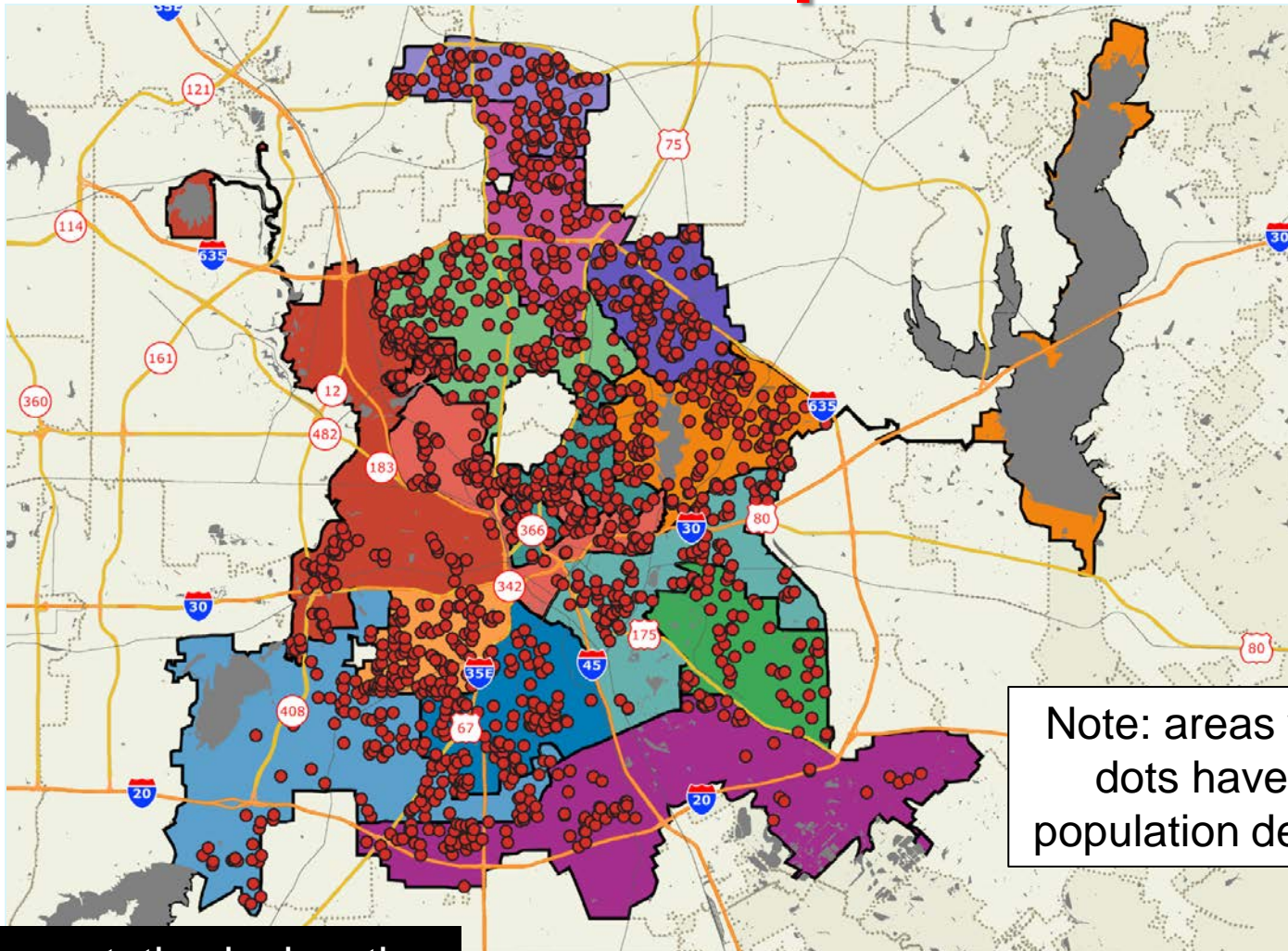
Survey Methodology

- **Survey description:**
 - survey was 7 pages long
 - took 15-20 minutes to complete
- **Sample size:** 1,523 completed surveys
 - at least 100 surveys were completed per district
 - response rate exceeded 30% in each district
- **Method of administration:**
 - by mail with follow-up by phone
 - randomly selected sample of households in the City
 - results valid for 14 council districts
- **Confidence level:** 95%
- **Margin of error:** +/- 2.5% overall
- **GIS mapping**

Why Do Community Surveys

- **According to a survey conducted by ETC Institute, only 7.2% of residents reported they have attended a City meeting**
- **Of those that have attended a City meeting, the majority attended for one of the following reasons:**
 - 1) They did not like the way services are being delivered
 - 2) They wanted to have an impact on the way services are being delivered

2014 City of Dallas Community Survey Location of Respondents



Good representation by location

Bottom Line Up Front

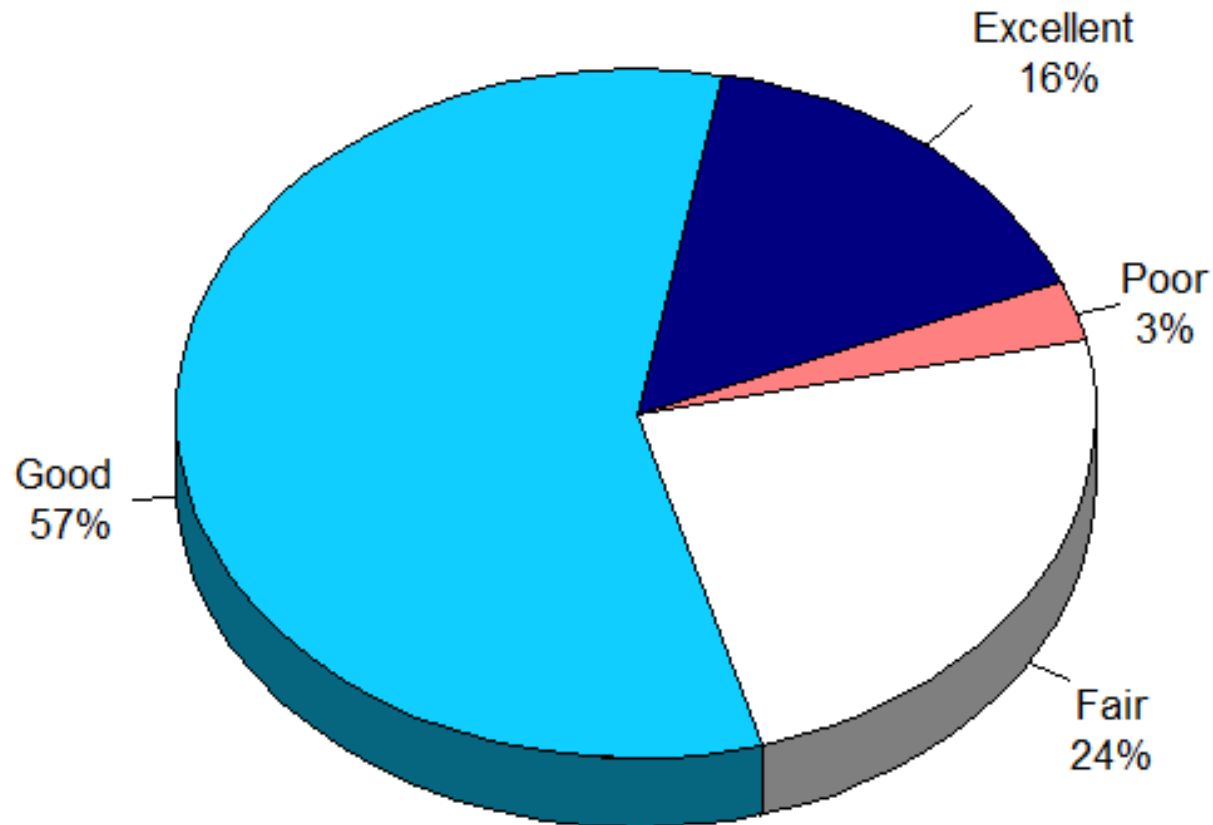
- Overall satisfaction with City services is 15% above the national average for large US cities
- The City is maintaining current service levels
- Overall satisfaction with city services is similar in most areas of the City
- Dallas rated above the national average for large U.S. cities in all areas of customer service that were assessed on the survey
- Although the City is generally heading in the right direction, there are opportunities for improvement

Major finding #1

Residents generally have a positive perception of the City

Q1. Ratings of the Overall Quality of Life in Dallas

by percentage of respondents (excluding don't knows)

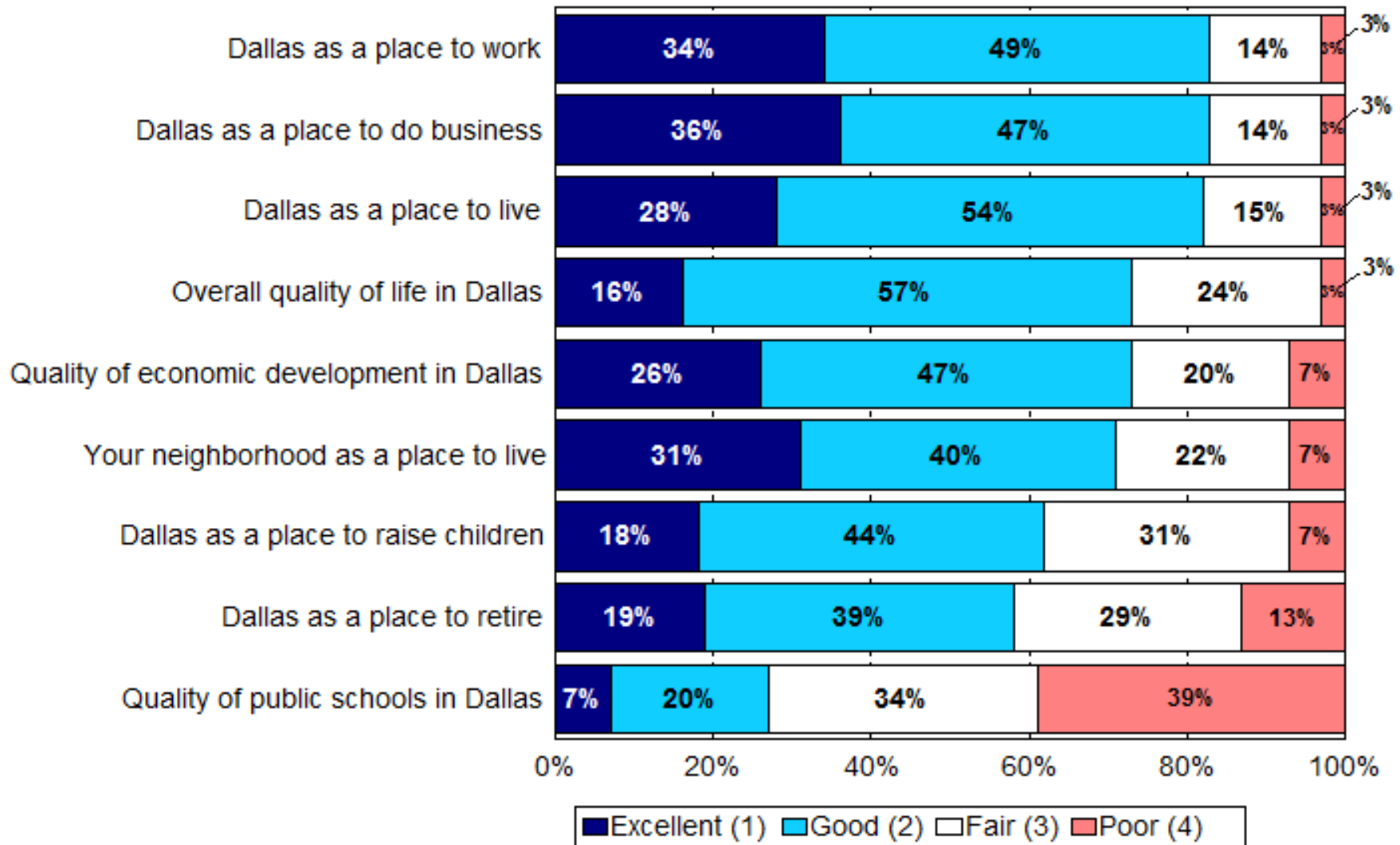


Source: ETC Institute (August 2014)

73% of the residents surveyed rated the overall quality of life in Dallas as "excellent" or "good"

Q1. Quality of Life Ratings

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale, where a rating of 1 is "excellent" and a rating of 4 is "poor" (excluding don't knows)

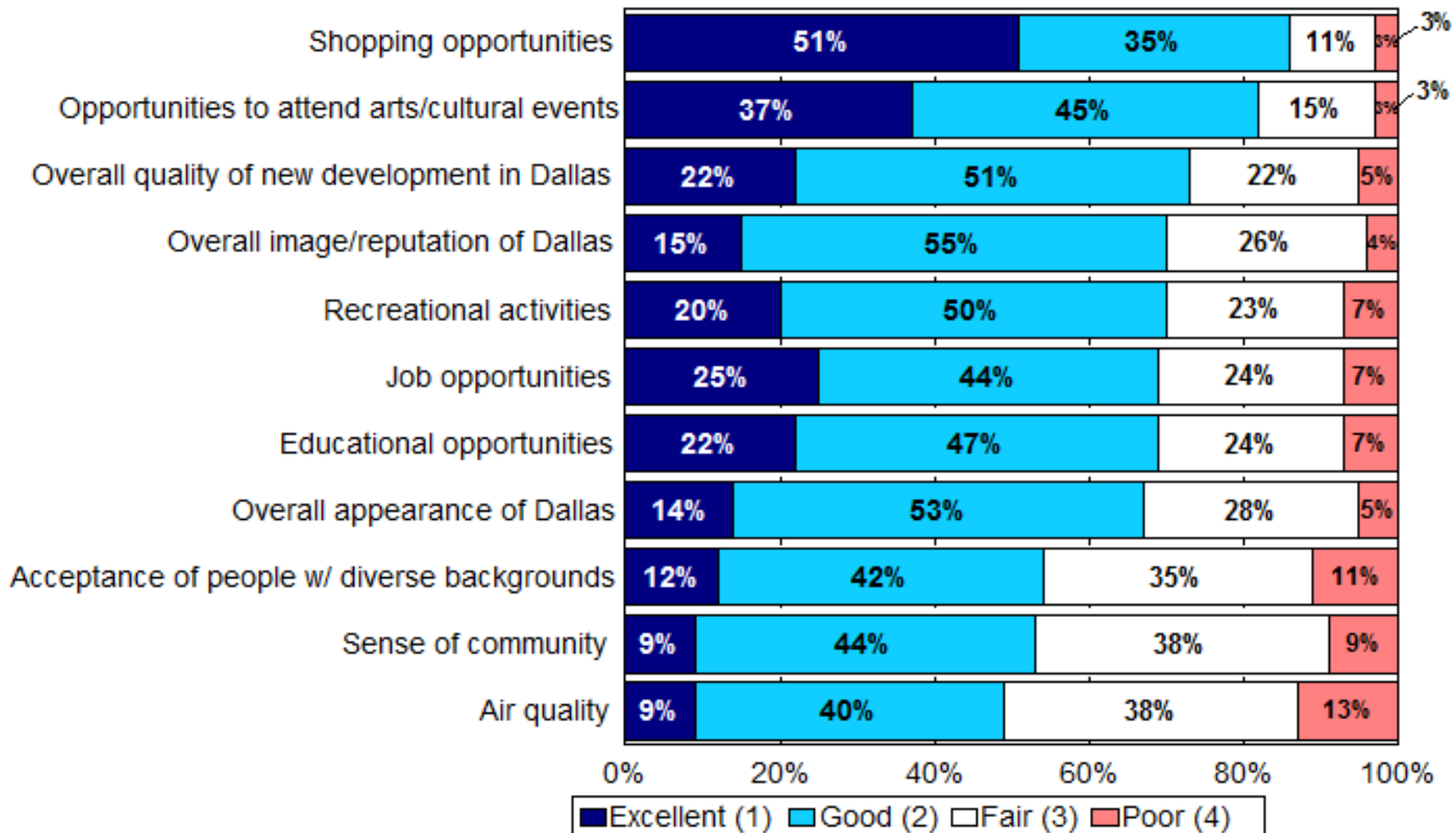


Source: ETC Institute (August 2014)

Most residents gave positive ratings for Dallas as a place to work, do business, and live

Q2. Ratings of Characteristics of the Community: General Characteristics and Opportunities

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale, where a rating of 1 is "excellent" and a rating of 4 is "poor" (excluding don't knows)

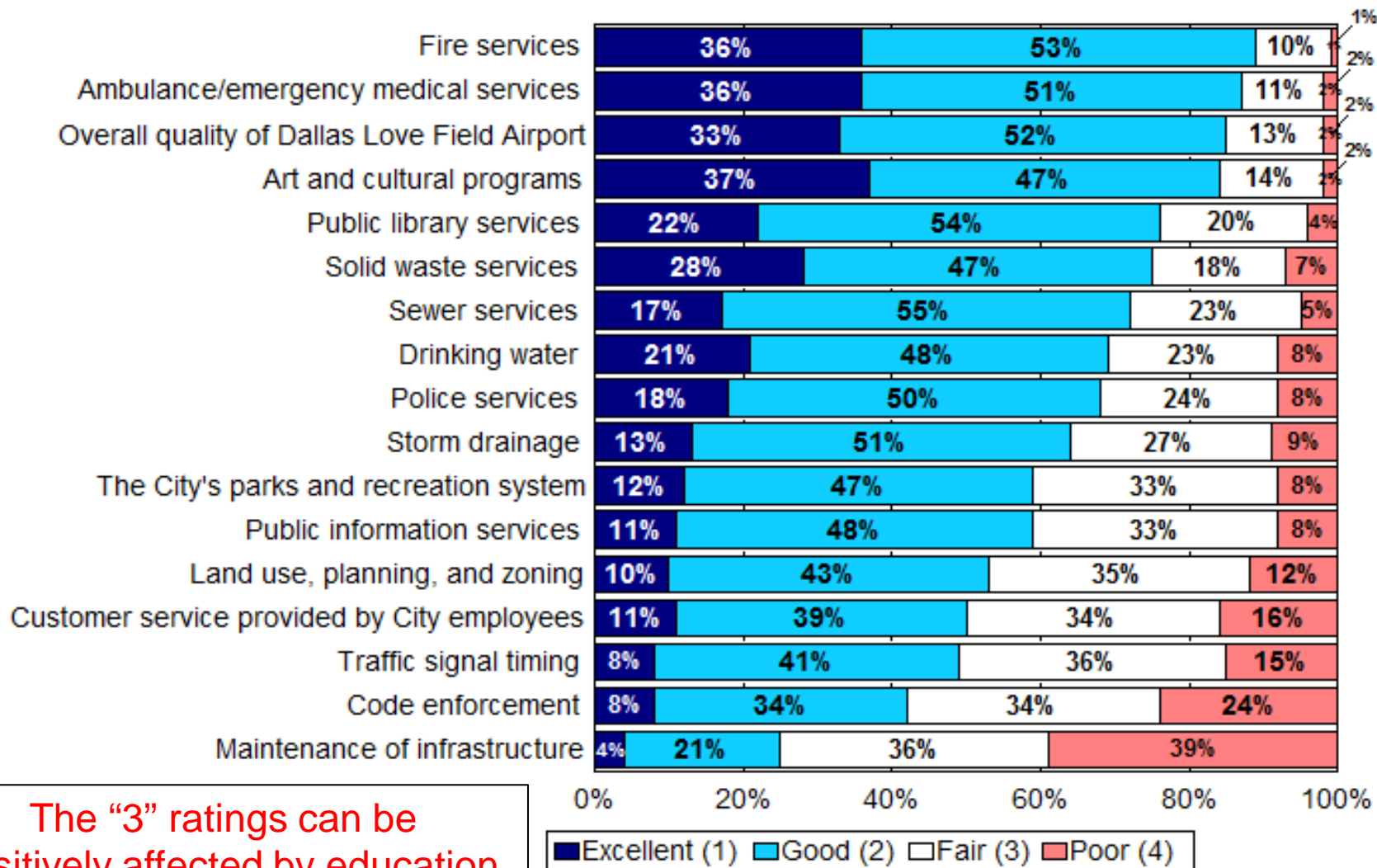


Source: ETC Institute (August 2014)

Dissatisfaction was low in all of the areas rated within this category

Q7. Ratings of Major Categories of City Services

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale, where a rating of 1 is "excellent" and a rating of 4 is "poor" (excluding don't knows)



The "3" ratings can be positively affected by education

With the exception of the maintenance of infrastructure, fewer than 25% of the residents surveyed gave negative ratings for any of the major categories of City services that were rated

Major finding #2

While there are some differences for specific services, overall satisfaction with City services is about the same in most areas of the City

Ratings of the Overall Quality of Governmental Services Provided by The City of Dallas

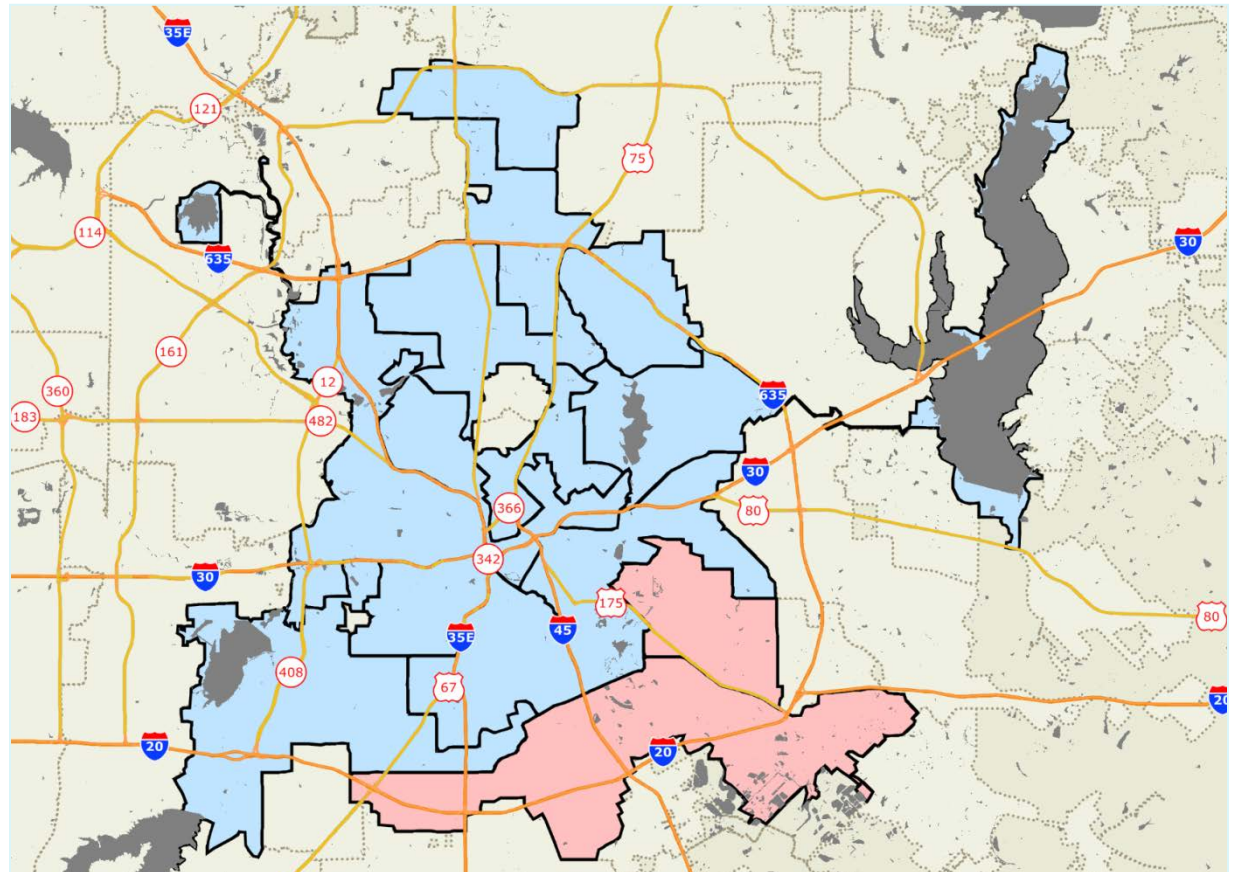
2014 Dallas Community Survey

Shading reflects the mean rating for all respondents by District

LEGEND

Mean rating on a 100-point scale, where 100=excellent and 0=poor

- Excellent
- Good
- Fair
- Poor
- Other (no responses)



Southern most area is generally less satisfied than other areas of the City

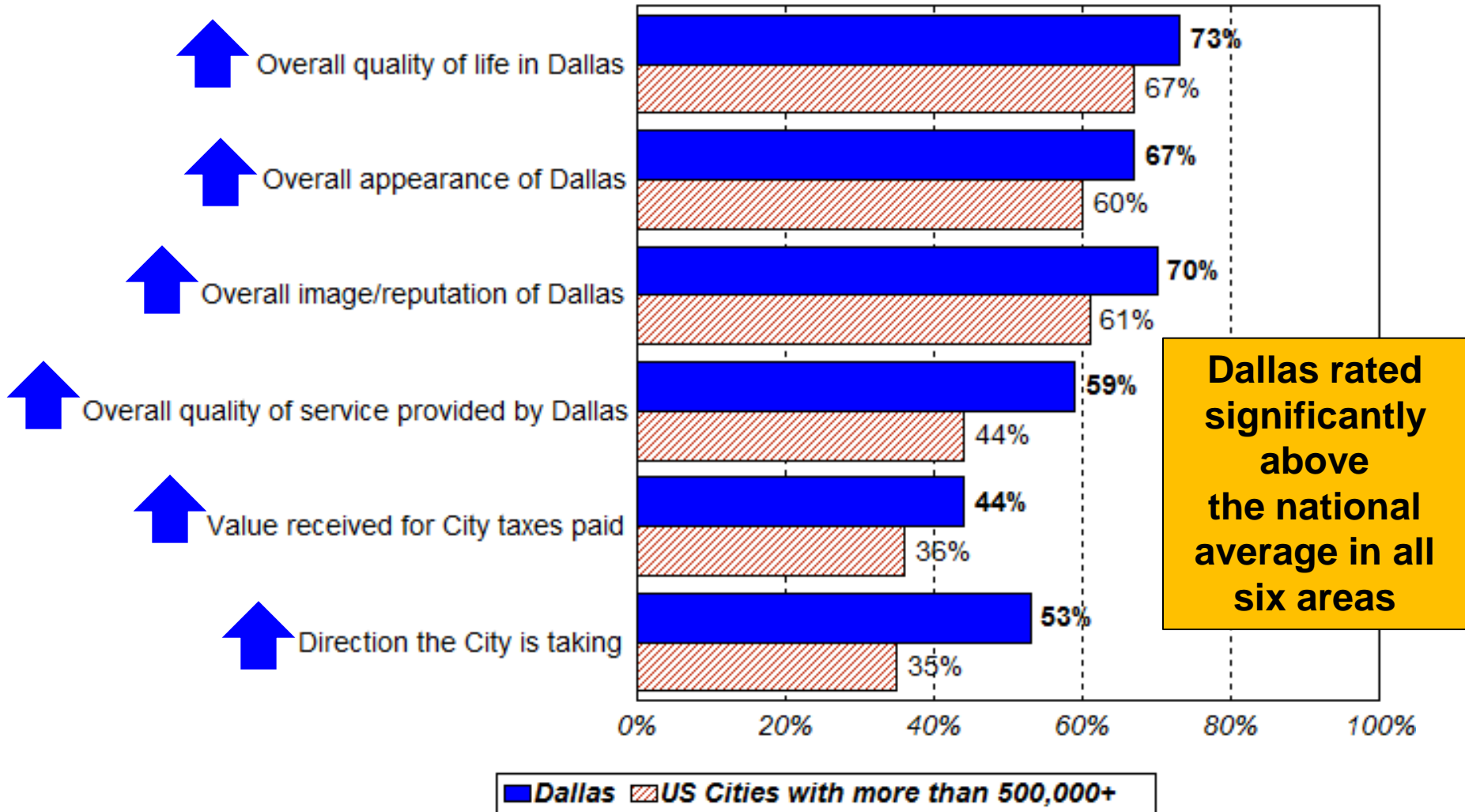
Major finding #3

The City of Dallas is setting the standard for service delivery compared to other large cities

Perceptions of the City

Dallas vs. Other Large U.S. Communities

by percentage of respondents who gave positive ratings for the item



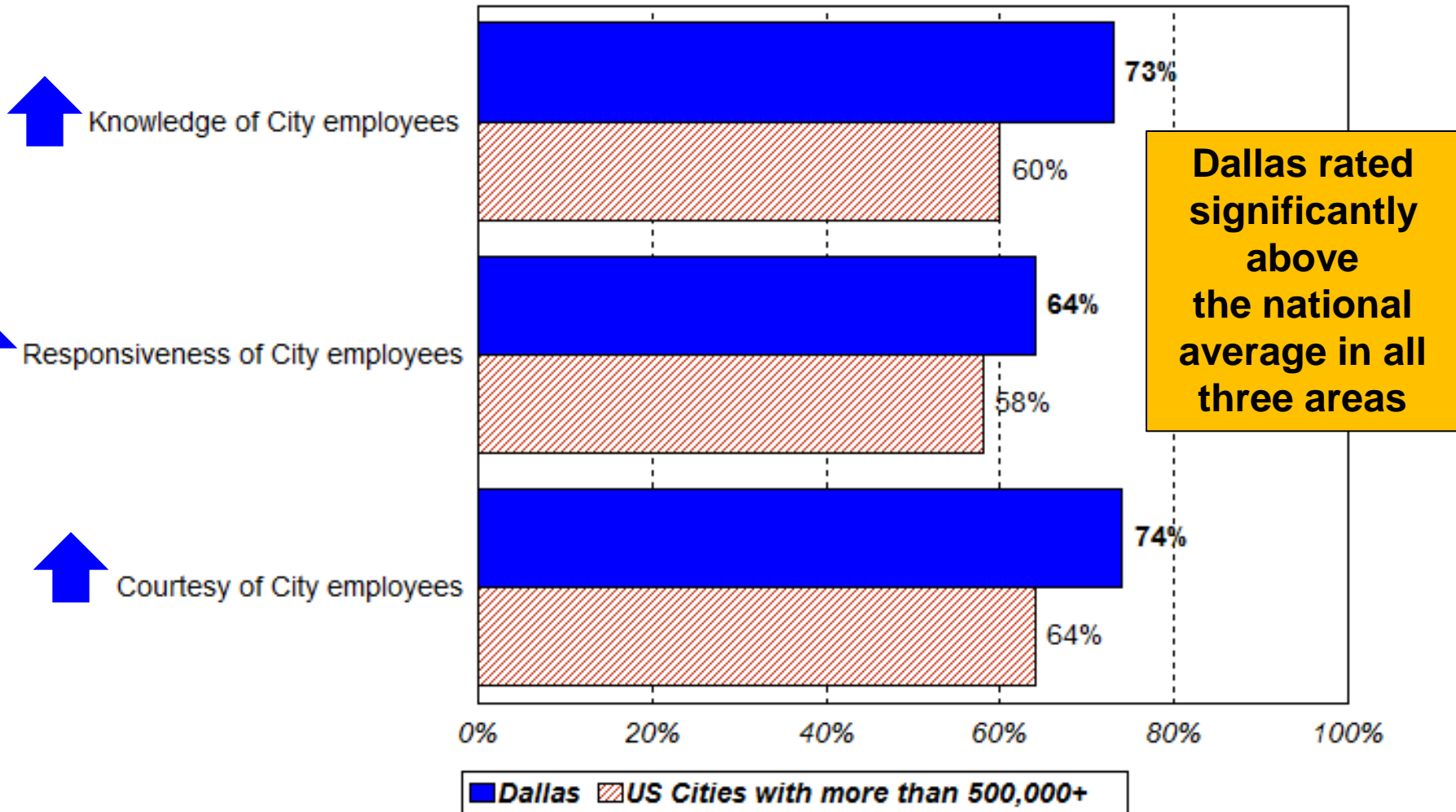
Source: ETC Institute (2014)

Significantly higher: ↑

Significantly lower: ↓

Satisfaction with Customer Service from City Employees *Dallas vs. Other Large U.S. Communities*

by percentage of respondents who gave positive ratings for the item



Source: ETC Institute (2014)

Significantly higher: ↑

Significantly lower: ↓

Major finding #4

The City continues to maintain high overall satisfaction ratings even though the results for most other large U.S. cities have decreased

Composite Satisfaction Indices

derived from the mean positive ratings provided by residents
Year 2007=100

↑ Quality of Life Index

↓ Mobility Index

↑ Major Services Index

↓ Customer Service Index

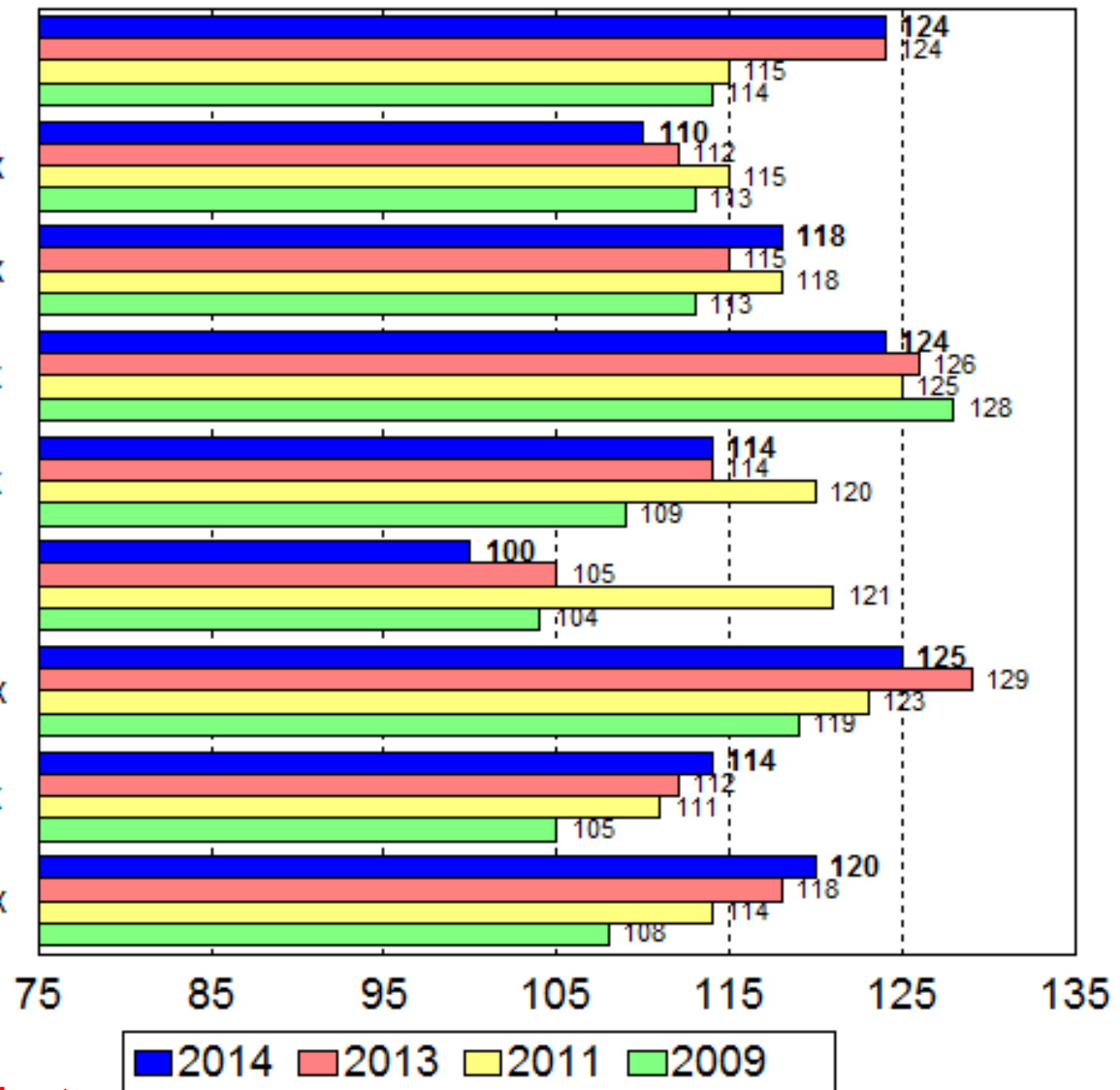
↑ Public Safety Index

↓ Streets and Infrastructure Index

↑ Solid Waste Index

↑ Parks and Recreation Index

↑ Perceptions Index



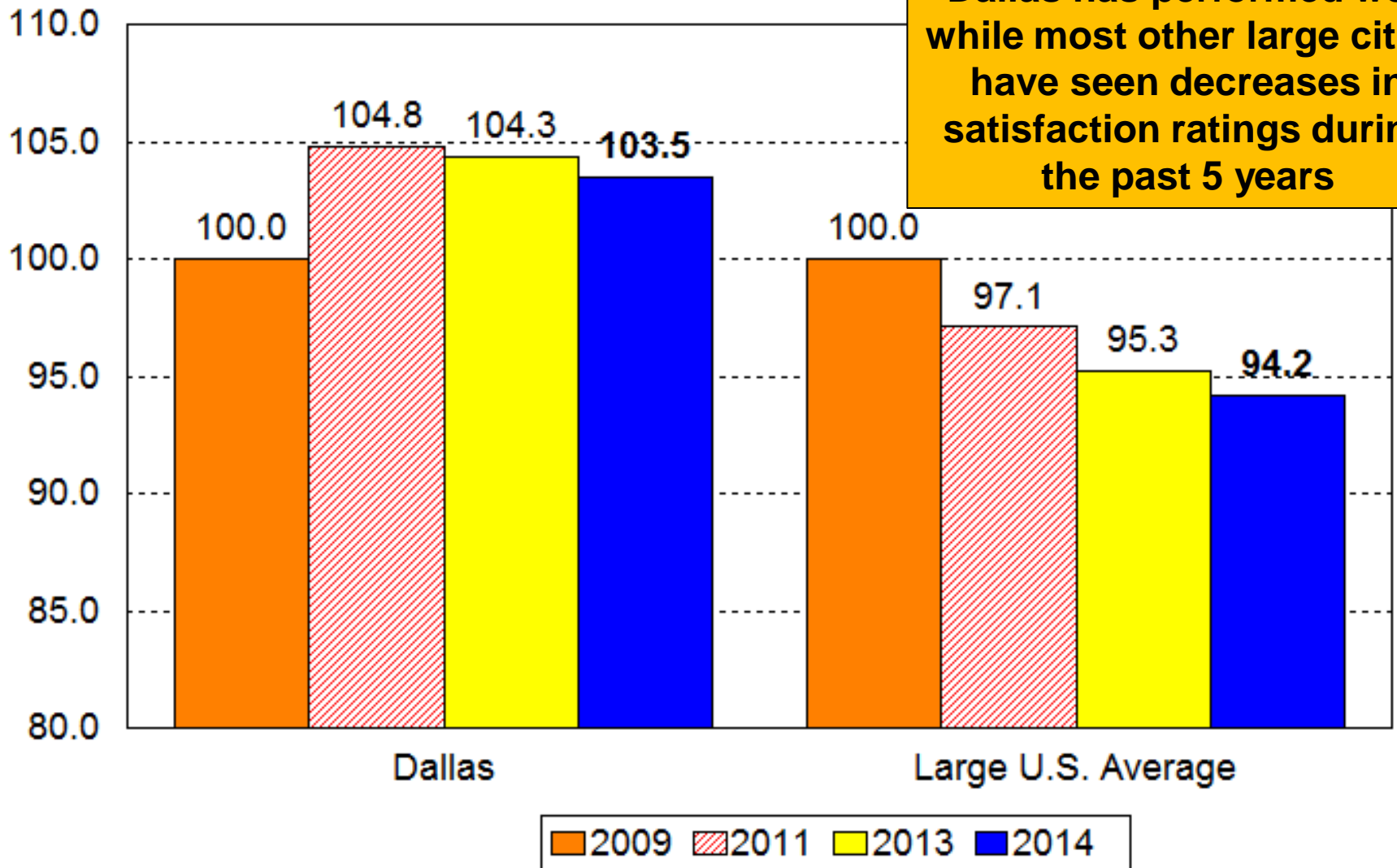
Changes of 3 points or more are significant

Significantly higher than 2009: ↑

Significantly lower than 2009: ↓

Overall Satisfaction Index

derived from the mean positive ratings provided by residents
Year 2009=100



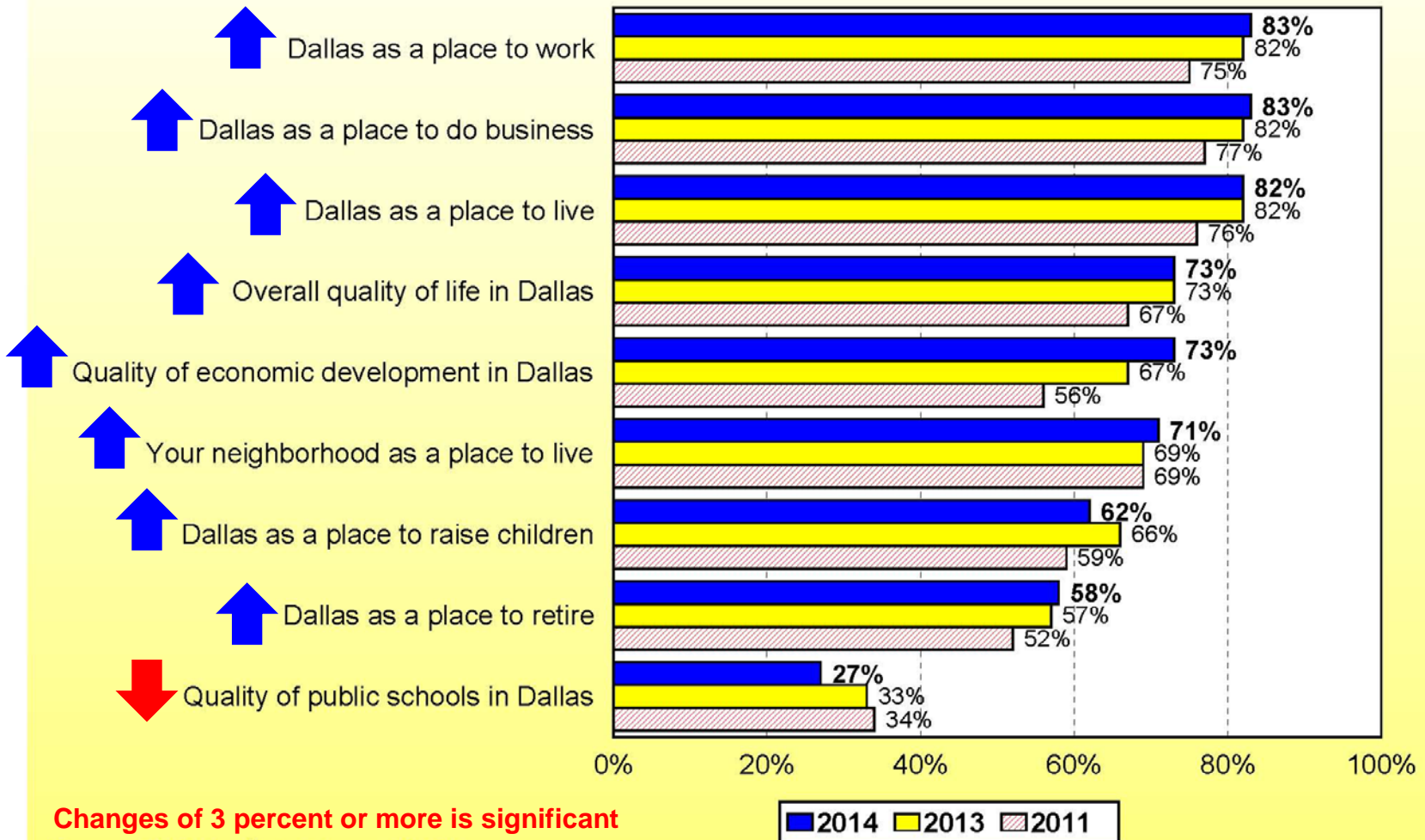
Dallas has performed well while most other large cities have seen decreases in satisfaction ratings during the past 5 years

Changes of 3 points or more are significant

The overall satisfaction index for Dallas is 3.5 points higher than it was 2009 while the national average has decreased by nearly 6 points

Q1. Quality of Life Ratings Trends - 2014, 2013 & 2011

by percentage of respondents who rated the item as "excellent" or "good" (excluding don't knows)



Significantly higher than 2009: ↑

Significantly lower than 2009: ↓

Q28. Level of Agreement with Statements Related to the City of Dallas: Trends - 2014, 2013, 2011 & 2009

by percentage of respondents who rated the item as "strongly agree" or "agree" (excluding don't knows)



I am pleased with the direction the City is taking

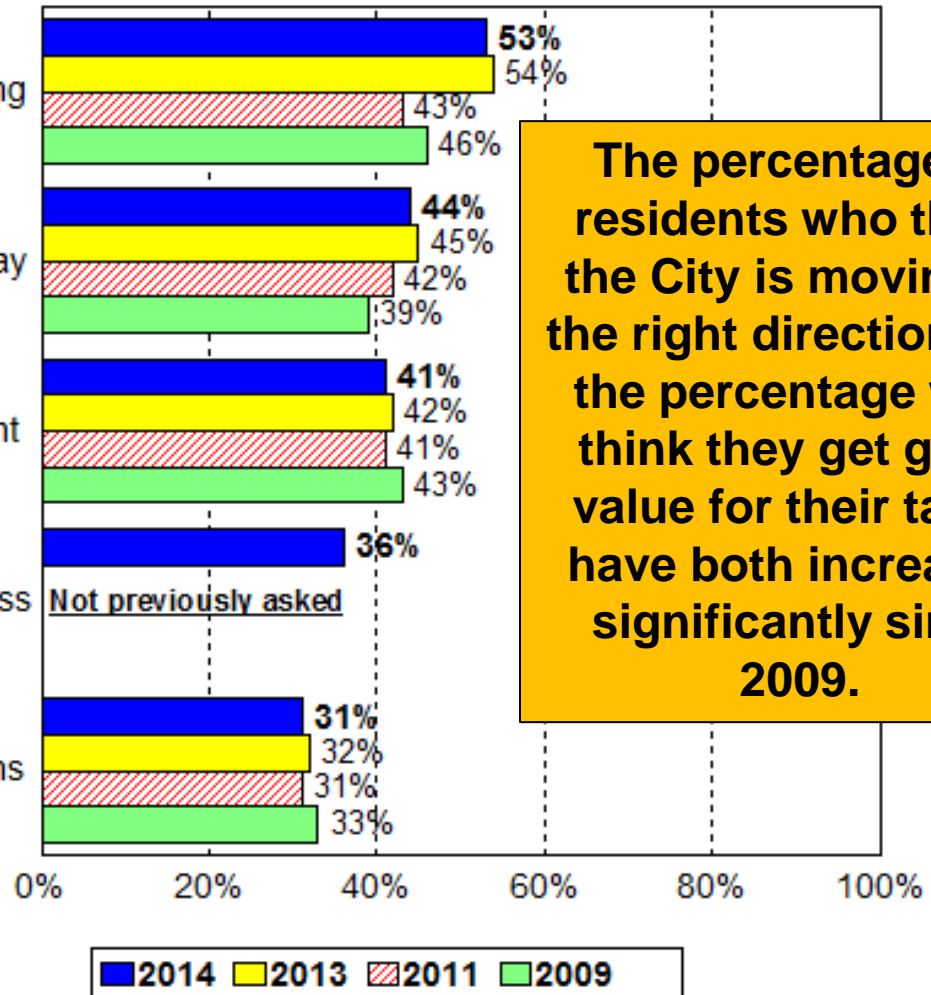


I receive good value for the taxes I pay

City government welcomes citizen involvement

City employees are ethical in conducting business

Dallas City government listens to citizens



Changes of 3 percent or more is significant

Source: ETC Institute (August 2014)

Significantly higher than 2009:

Significantly lower than 2009:

Most Notable INCREASES from 2013-2014

(areas where ratings increased by 5% or more)

- Quality of drinking water (2013=55%, 2014=69%)
- Taste/smell of tap water in your home (2013=54%, 2014=67%)
- Response to water/wastewater service issues (2013=58%, 2014=66%)
- Water conservation programs (2013=57%, 2014=64%)
- Quality of economic development in Dallas (2013=67%, 2014=73%)
- Job opportunities (2013=64%, 2014=69%)
- Sewer services (2013=67%, 2014=72%)
- Response time of fire to emergencies (2013=79%, 2014=84%)
- Fire prevention and education (2013=58%, 2014=63%)
- Street lighting (2013=39%, 2014=44%)

Most Notable DECREASES from 2013-2014

(areas where ratings decreased by 5% or more)

- City's social media services (2013=55%, 2014=45%)
- Services to low-income people (2013=43%, 2014=34%)
- Services to seniors (2013=54%, 2014=45%)
- Townhall meetings (2013=44%, 2014=36%)
- Household hazardous waste disposal (2013=60%, 2014=52%)
- Services to youth (2013=49%, 2014=42%)
- Accessibility of facilities/services for disabled (2013=66%, 2014=60%)
- Outdoor swimming facilities (2013=41%, 2014=35%)
- Quality of public schools in Dallas (2013=33%, 2014=27%)
- Availability of information about City programs & services (2013=51%, 2014=46%)

Major finding #5

Although the City is generally heading in the right direction, there are still opportunities for improvement

Importance-Satisfaction Rating

City of Dallas

Major Categories of City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS >.20)</u>						
Maintenance of infrastructure	53%	2	25%	17	0.3975	1
<u>High Priority (IS .10-.20)</u>						
Code enforcement	31%	3	42%	16	0.1798	2
Police services	53%	1	68%	9	0.1696	3
Traffic signal timing	20%	7	49%	15	0.1020	4
<u>Medium Priority (IS <.10)</u>						
Drinking water	28%	4	69%	8	0.0868	5
Customer service provided by City employees	14%	10	50%	14	0.0700	6
Land use, planning and zoning	14%	11	53%	13	0.0658	7
The City's parks and recreation system	16%	8	59%	12	0.0656	8
Solid waste services	15%	9	75%	6	0.0375	9
Storm drainage	9%	13	64%	10	0.0324	10
Ambulance/emergency medical services	24%	6	87%	2	0.0312	11
Public information services	7%	15	59%	11	0.0287	12
Fire services	26%	5	89%	1	0.0286	13
Sewer services	10%	12	72%	7	0.0280	14
Public library services	8%	14	76%	5	0.0192	15
Arts and cultural programs	7%	15	84%	4	0.0112	16
Overall quality of Dallas Lovefield Airport	4%	17	85%	3	0.0060	17

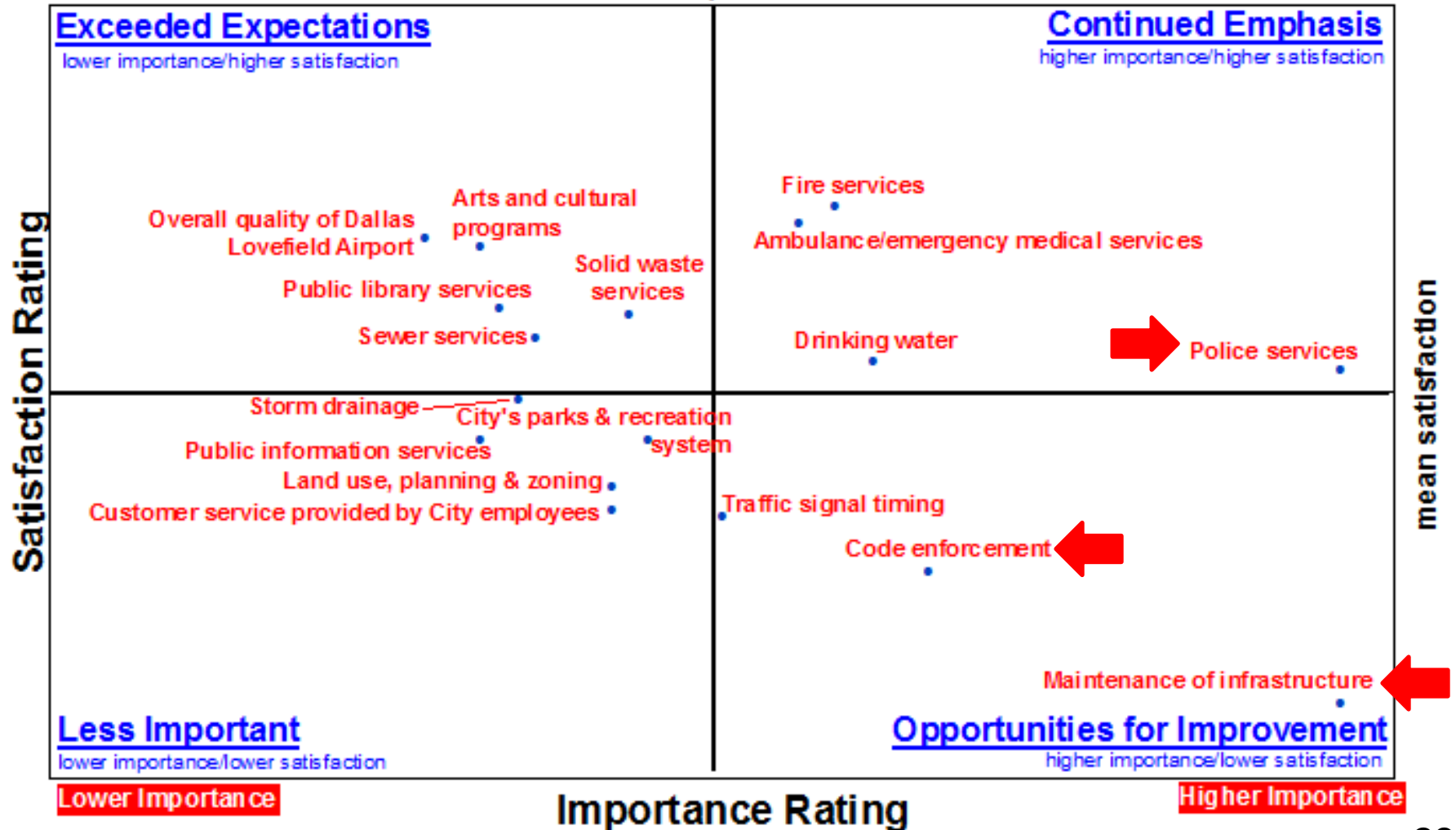
Overall priorities: 

2014 City of Dallas DirectionFinder Importance-Satisfaction Assessment Matrix

-Major Categories of City Services-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

mean importance



Summary and Conclusions

- Overall satisfaction with City services is 15% above the national average for large US cities
- The City is maintaining current service levels
- Overall satisfaction with city services is similar in most areas of the City
- Dallas rated above the national average for large U.S. cities in all areas of customer service that were assessed on the survey
- Although the City is generally heading in the right direction, there are opportunities for improvement

Questions?

THANK YOU