Memorandum

CITY OF DALLAS

DATE April 27, 2018

TO Honorable Mayor and Members of the City Council

SUBJECT **2018 Community Survey**

We are pleased to present the findings of the 2018 City of Dallas Community Survey. The City of Dallas is still setting the standard for customer service with overall satisfaction 9 percent above the national average compared to other large U.S. cities. The survey results also highlight areas for improvement which will inform our preparation of the next biennial budget.

ETC Institute, the vendor that conducted the survey, will be on site May 2 to discuss the results with you. Mr. Tatham is a graduate of Princeton University (B.A., Political Science/Economics) and Kansas State University (M.B.A.). ETC Institute has conducted research for more major U.S. cities than any other firm. Other clients include San Antonio, Las Vegas, Houston, and Washington, D.C.

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

We are committed to Service First, and look forward to using this invaluable feedback from our residents to build a budget that puts the needs of the community first and ensures we deliver exceptional service consistently.

T.C. Broadnax
City Manager

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Larry Casto, City Attorney	Jon Fortune, Assistant City Manager
Craig D. Kinton, City Auditor	Joey Zapata, Assistant City Manager
Bilierae Johnson, City Secretary	M. Elizabeth Reich, Chief Financial Officer
Daniel F. Solis, Administrative Judge	Nadia Chandler Hardy, Chief of Community Services
Kimberly Bizor Tolbert, Chief of Staff to the City Manager	Raquel Favela, Chief of Economic Development & Neighborhood Services
Majed A. Al-Ghafry, Assistant City Manager	Theresa O'Donnell, Chief of Resilience
Jo M. (Jody) Puckett, Assistant City Manager (Interim)	Directors and Assistant Directors

ETC Institute

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
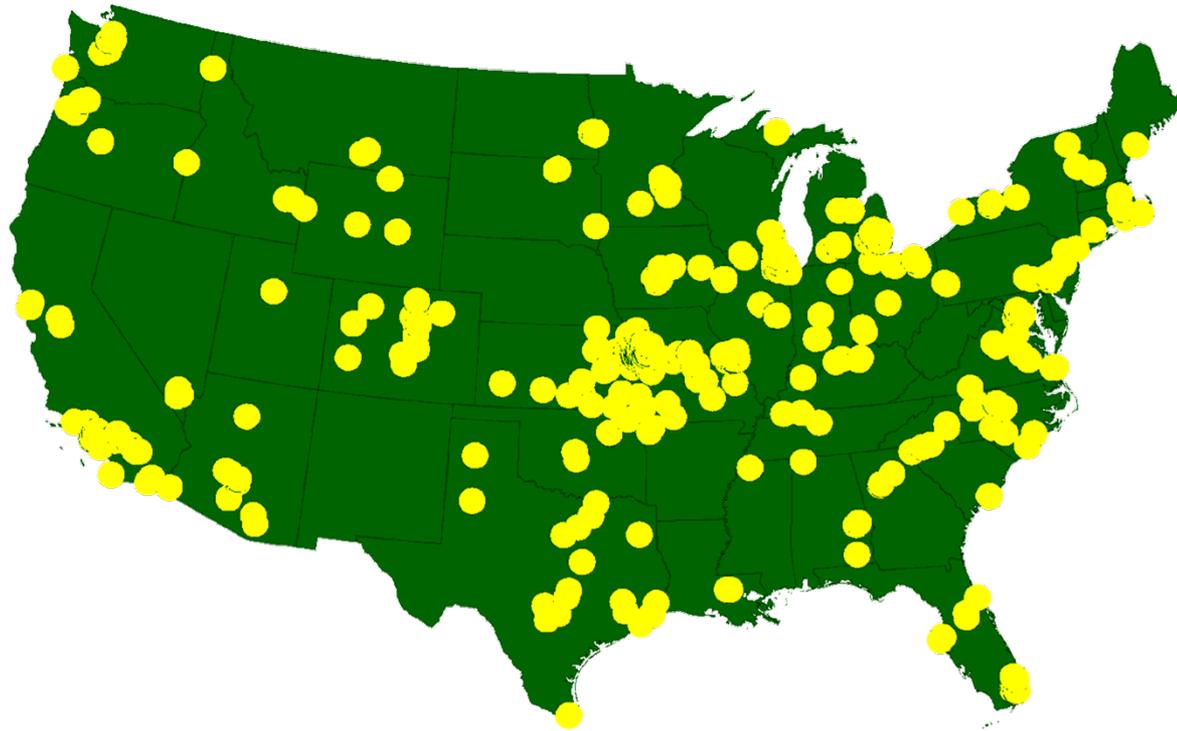
More than 2,150,000 persons surveyed since 2007 for more than 900 cities in 49 states, including 12 of the 20 largest US cities and 11 of the 20 largest US counties.

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
- Louisville, KY

- Houston, TX
- Indianapolis, IN
- Charlotte, NC
- Nashville, TN
- Fort Worth, TX
- Denver, CO
- Washington D.C.
- El Paso, TX
- Tucson, AZ
- Portland, OR
- Milwaukee, WI
- San Francisco, CA

ETC Institute maintains data for 24 of the 34 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:** 1,442 completed surveys
  - at least 100 surveys were completed per district

- **Method of administration:**
  - by mail with follow-up by e-mail and phone
  - randomly selected sample of households in the City
  - results valid for 14 council districts

- **Confidence level:** 95%

- **Margin of error:** +/- 2.6% overall

- **GIS mapping**

2018 City of Dallas Community Survey Location of Respondents

Survey Respondents by Council District

by percentage of respondents

District 3 7.7%(111)
District 4 7.4% (107)
District 2 7.2%(104)
District 5 6.9% (100)
District 1 7.1%(102)
District 6 7.5%(108)
District 14 7.3% (105)
District 7 6.9% (100)
District 13 7.1%(103)
District 8 7.1% (102)
District 12 6.9% (100)
District 9 6.9%(100)
District 11 6.9% (100)
District 10 6.9% (100)
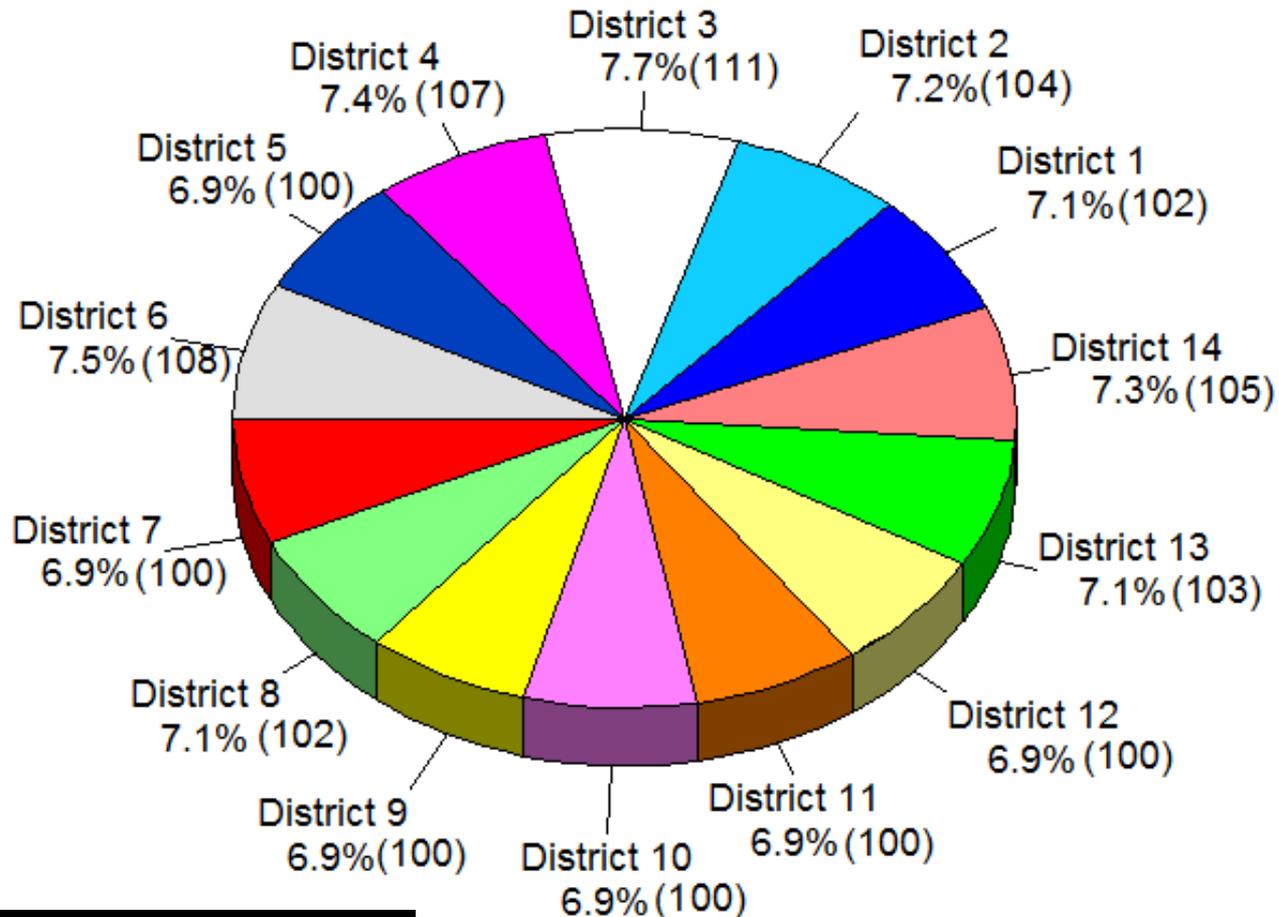
Good representation by district

Bottom Line Up Front

- Residents have a positive perception of the City
  - 72% rated the overall quality of life as "excellent" or "good"; only 4% gave a rating of "poor"

- Overall satisfaction with City services is 9% above the national average for large US cities

- Dallas is setting the standard for customer service among large U.S. cities

- Top priorities for residents were:
  - Infrastructure maintenance
  - Police services
  - Code enforcement

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)

Excellent 16%

Poor 4%

Good 56%

Fair 24%
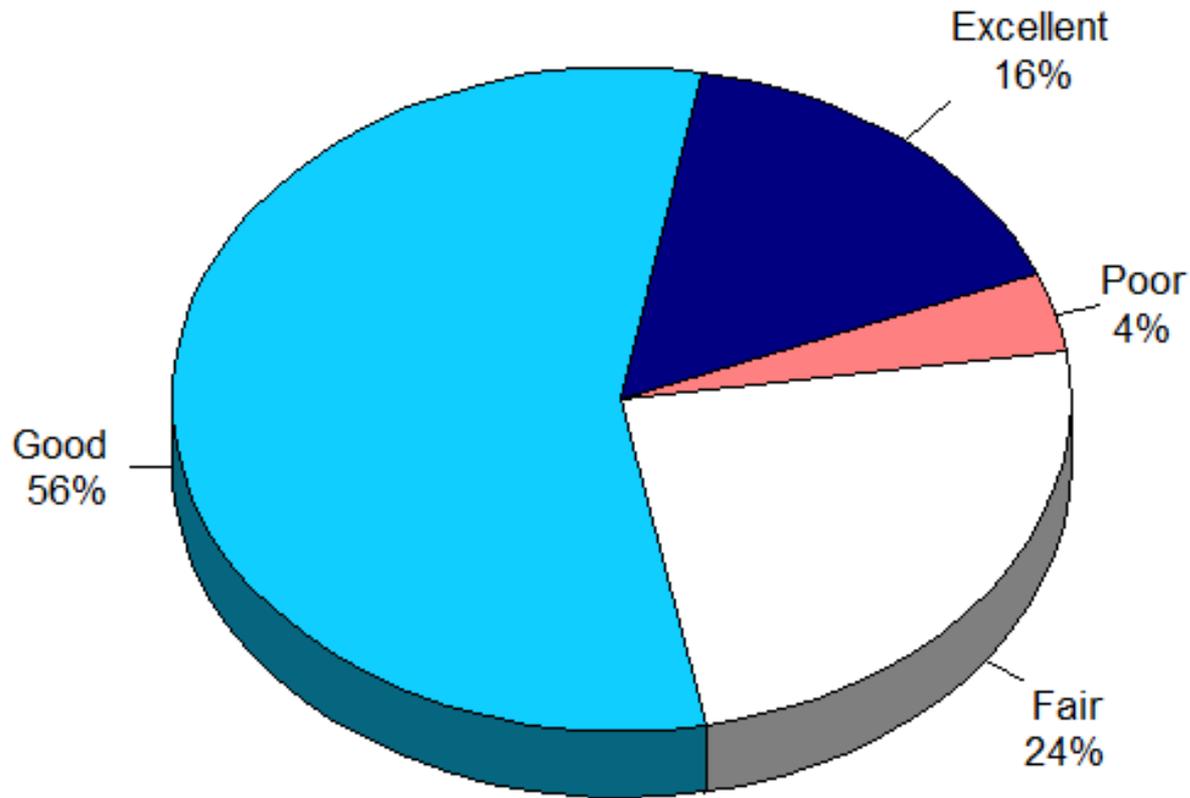
Source: ETC Institute (2018)

72% of residents rated the overall quality of life in Dallas as "excellent" or "good"; only 4% gave a rating of "poor"

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 4 is "excellent" and a rating of 1 is "poor" (excluding don't knows)

	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Dallas as a place to work	40%	44%	13%	3%
Dallas as a place to do business	41%	43%	13%	3%
Dallas as a place to live	28%	52%	17%	3%
Overall quality of life in Dallas	16%	56%	24%	4%
Quality of economic development in Dallas	29%	43%	21%	7%
Your neighborhood as a place to live	27%	42%	22%	9%
Dallas as a place to raise children	19%	42%	30%	9%
Dallas as a place to retire	18%	36%	30%	16%
Quality of public schools in Dallas	7%	21%	35%	37%

■Excellent (4) ■Good (3) □Fair (2) ■Poor (1)
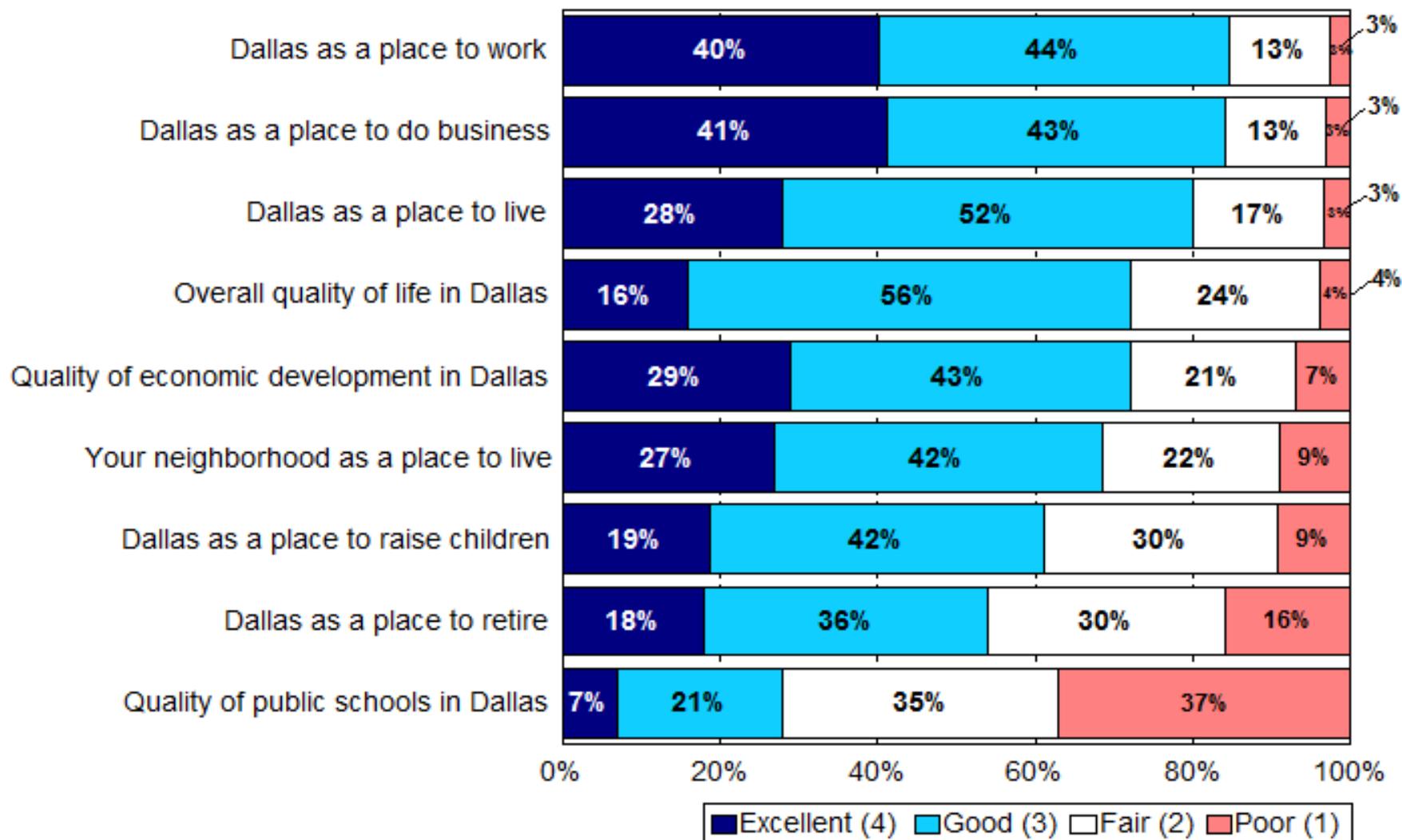
Most residents gave positive ratings for Dallas as a place to work, do business, and live

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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 4 is "excellent" and a rating of 1 is "poor" (excluding don't knows)

Characteristic	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Opportunities to attend arts/cultural events	29%	45%	20%	6%
Overall image/reputation of Dallas	12%	51%	30%	7%
Acceptance of people w/ diverse backgrounds	10%	42%	35%	13%
Air quality	8%	42%	36%	14%
Sense of community	9%	40%	39%	12%

Source: ETC Institute (2018)

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

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Q8. Ratings of <u>Major Categories</u> 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 4 is "excellent" and a rating of 1 is "poor" (excluding don't knows)
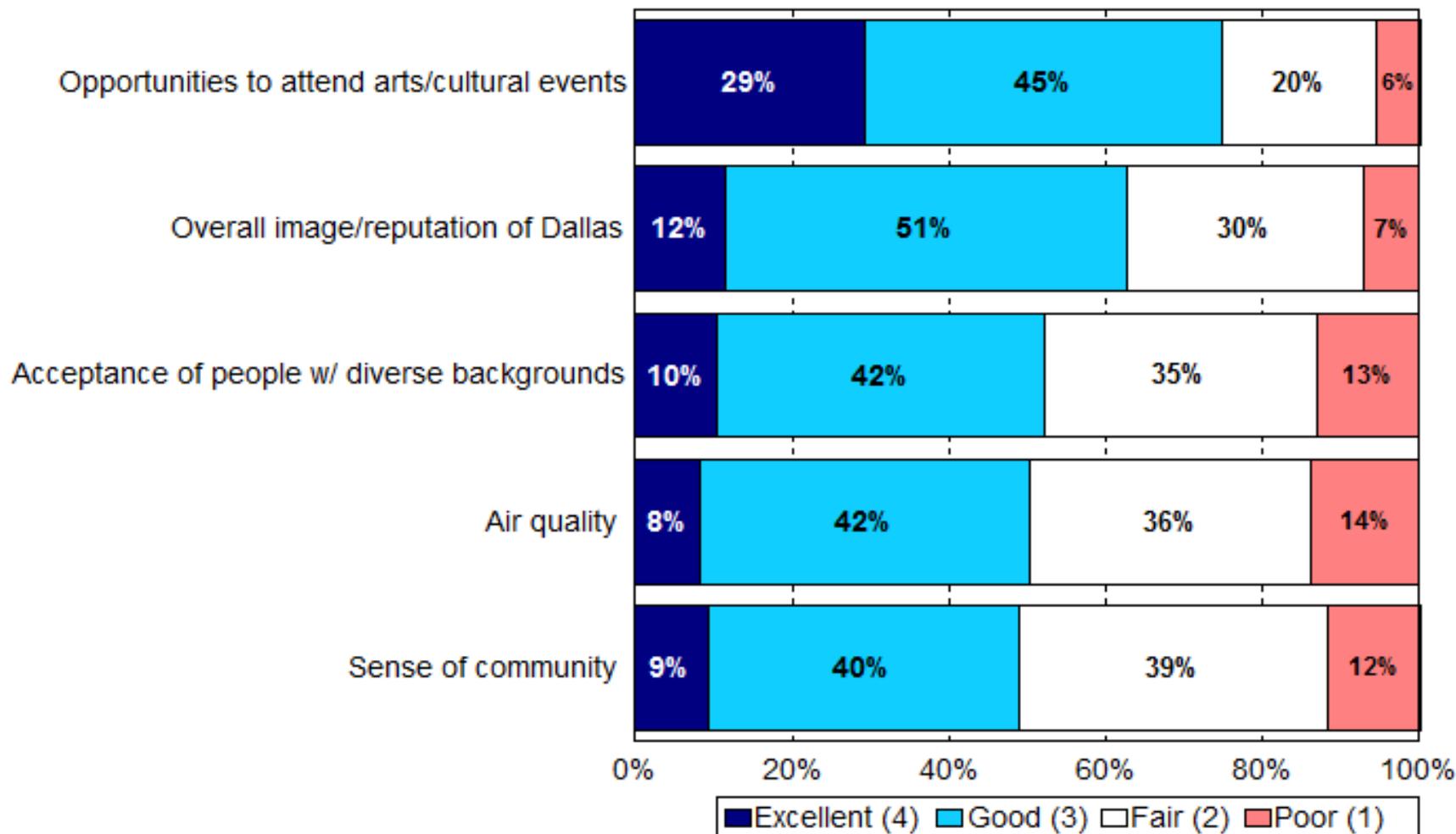
Category	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Dallas Love Field Airport	49%	42%	8%	1%
Fire services	56%	33%	9%	2%
Public library services	43%	42%	12%	3%
Art and Cultural programs/facilities	37%	47%	14%	2%
Sewer services	24%	54%	16%	6%
Ambulance/emergency medical services	45%	33%	18%	4%
Solid waste services	32%	43%	17%	8%
Parks and recreation system	19%	52%	22%	7%
Drinking water	22%	46%	23%	9%
Storm drainage	19%	44%	23%	14%
Public information services	17%	46%	26%	11%
Police services	24%	38%	19%	19%
Customer service provided by city employees	22%	40%	24%	14%
Municipal court services	18%	37%	32%	13%
Traffic signal timing	10%	41%	32%	17%
Land use, planning, and zoning	12%	26%	29%	33%
Neighborhood code enforcement	10%	27%	29%	34%
Maintenance of infrastructure	5%	19%	32%	44%

Source: ETC Institute (2018)

With the exception of the maintenance of infrastructure, the percentage of "excellent/good" ratings exceeded the percentage of "poor "ratings

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Major finding #2

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 rated the item as a 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 4 was "satisfied"

Overall quality of life in Dallas — 66% / **72%**

Overall image/reputation of Dallas — 60% / **63%**

Quality of services provided by City of Dallas — 44% / **53%**

Direction the City is heading — 38% / **43%**

Value received for City taxes paid — 31% / **34%**

Dallas rated significantly above the national average in most areas

☐ U.S. Cities with more than 500,000+   ■ Dallas

0%   20%   40%   60%   80%   100%

Source: ETC Institute (2018)

Significantly higher: ⬆   **Significantly lower:** ⬇

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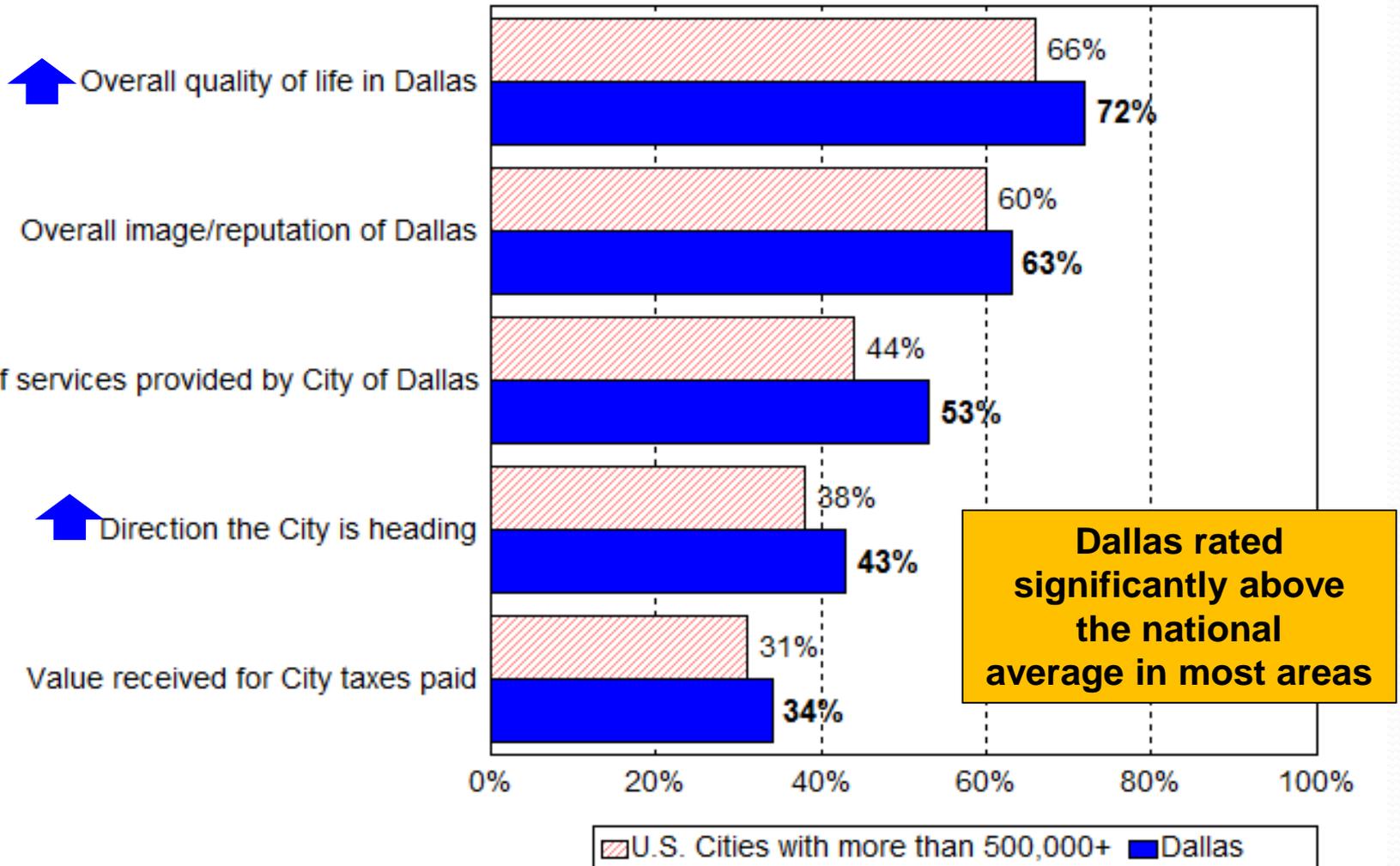
Satisfaction with City Services
Dallas vs. Other Large U.S. Communities
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 4 was "satisfied"

Service	U.S. Cities 500,000+	Dallas
Overall quality of fire services	70%	89%
Overall quality of library services	62%	85%
Overall quality of emergency medical services	65%	78%
Quality of parks & recreation programs/services	61%	71%
Overall effectiveness of city communication	36%	63%
Overall quality of police services	61%	62%
Overall quality of customer service	37%	62%
Overall enforcement of city codes/ordinances	29%	38%
Maintenance of streets in your neighborhood	42%	25%
Overall maintenance of city streets	32%	24%

Dallas rated significantly above the national average in most areas

U.S. Cities with more than 500,000+   Dallas

Source: ETC Institute (2018)

Significantly higher: **Significantly lower:**

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Customer Service from City Employees
Dallas vs. Other Large U.S. Communities
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 4 was "satisfied"

Courtesy of City employees
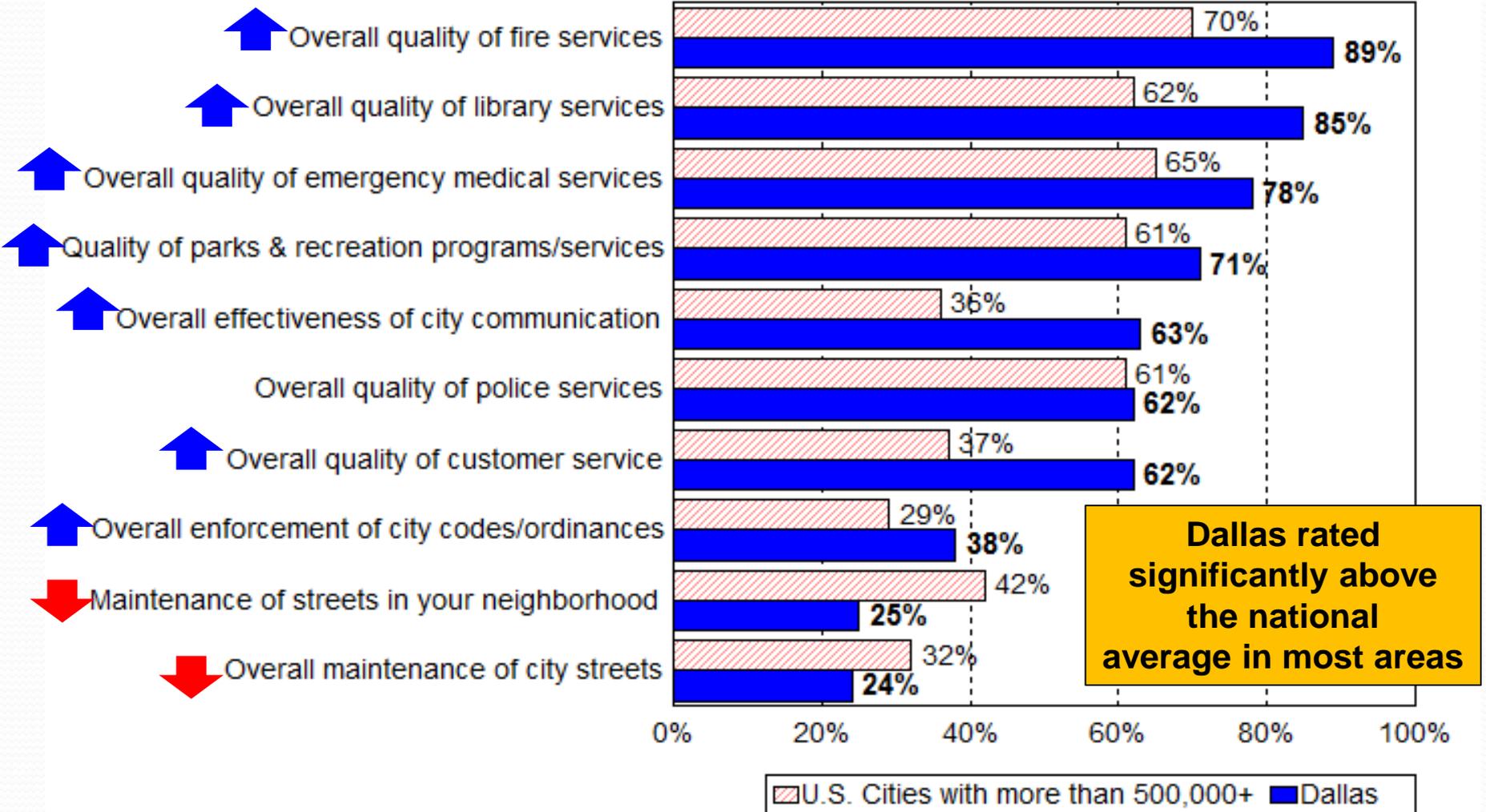- US Cities: 62%
- Dallas: 78%

Knowledge of City employees
- US Cities: 60%
- Dallas: 74%

Responsiveness of City employees
- US Cities: 57%
- Dallas: 68%

Dallas rated significantly above the national average in all 3 areas

Legend: US Cities with more than 500,000+ | Dallas

Source: ETC Institute (2018)

Significantly higher: ⬆ **Significantly lower:** ⬇

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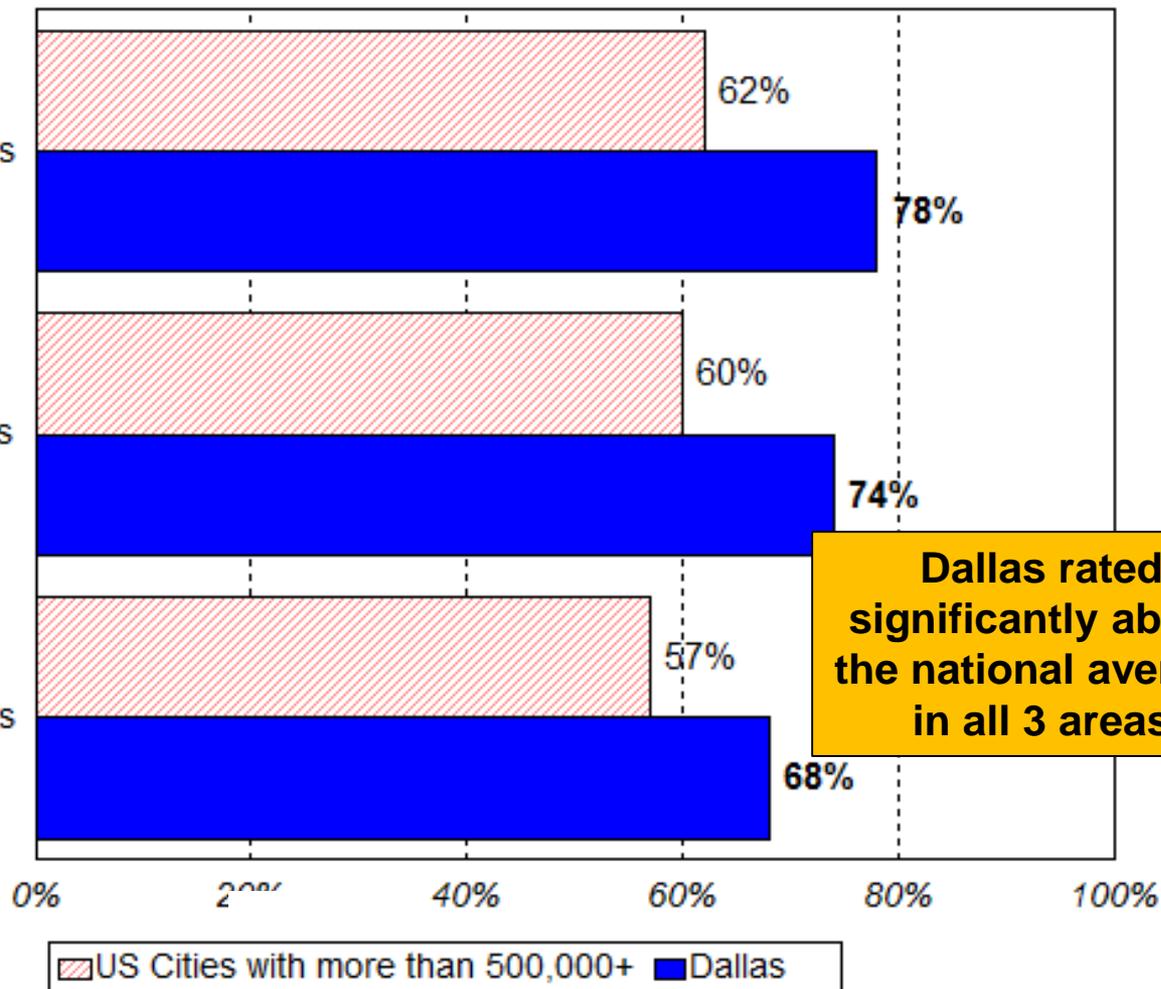
Major finding #3
Trend Analysis
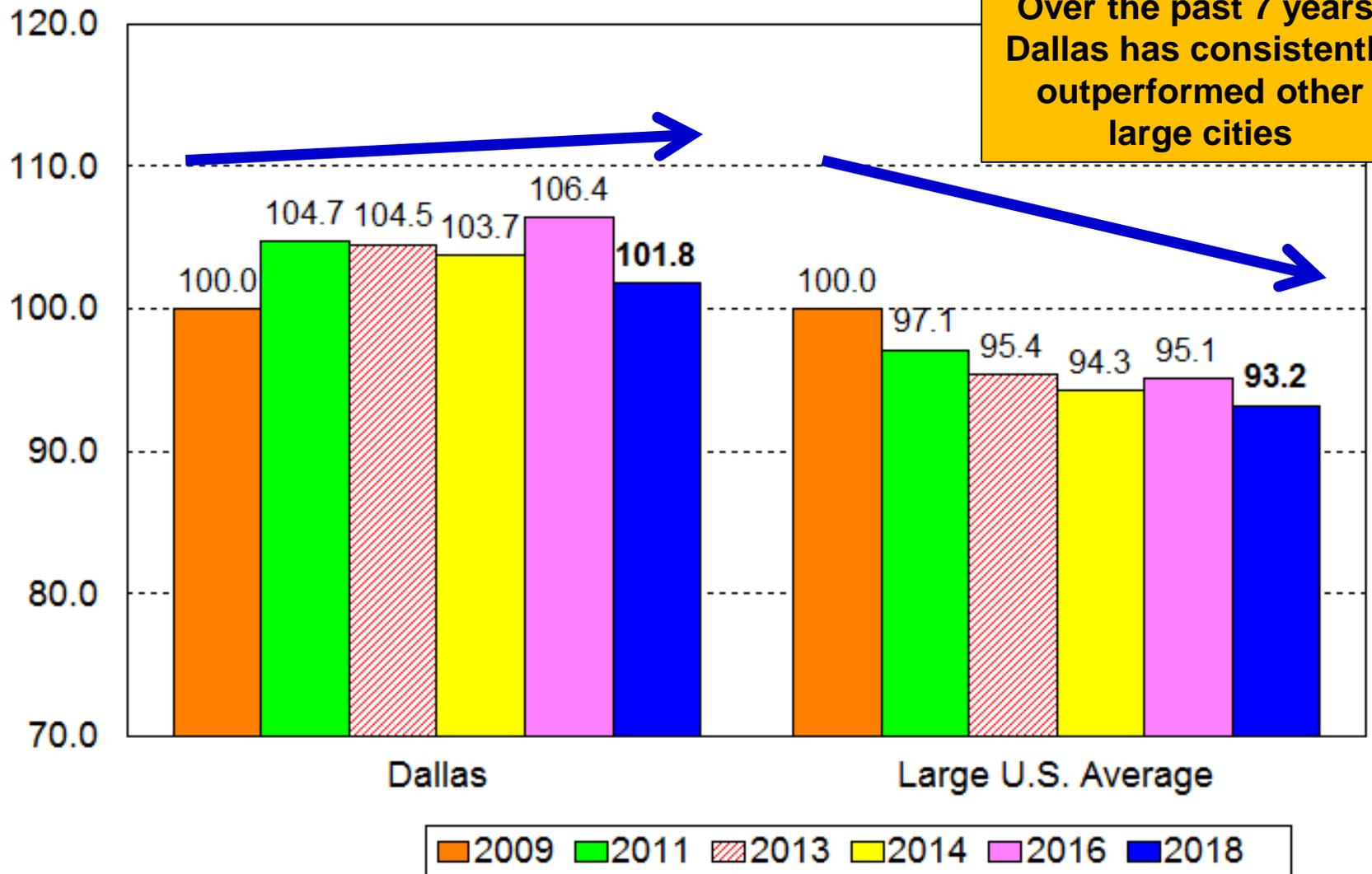
Overall Satisfaction Index

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

Over the past 7 years, Dallas has consistently outperformed other large cities

Dallas: 100.0, 104.7, 104.5, 103.7, 106.4, **101.8**

Large U.S. Average: 100.0, 97.1, 95.4, 94.3, 95.1, **93.2**

Dallas   Large U.S. Average
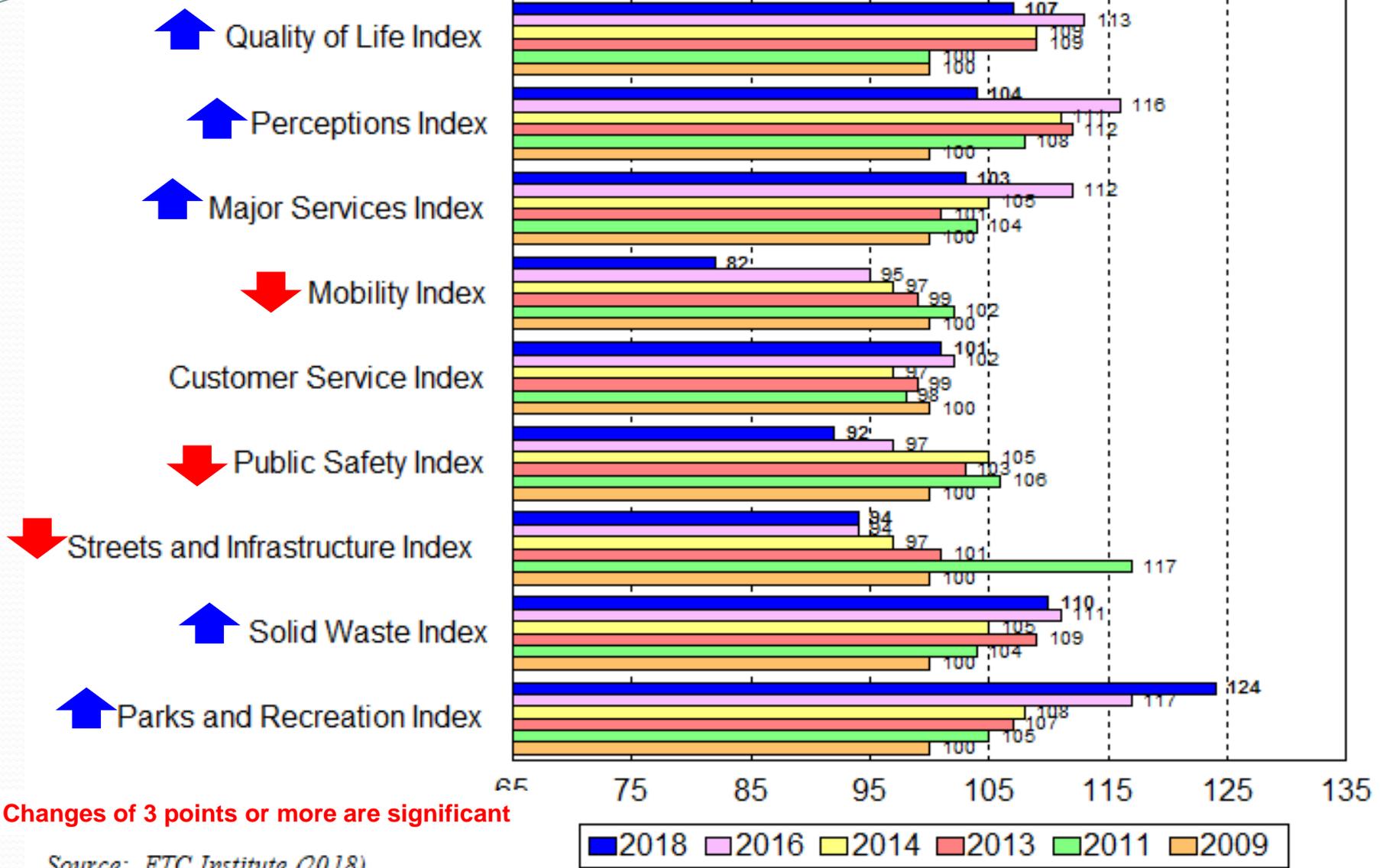
□2009 □2011 ▨2013 □2014 □2016 ■2018

Source: ETC Institute (2018)

The overall satisfaction index for Dallas has decreased since 2016, but is higher than in 2009; the national average has decreased by nearly 7 points since 2009

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Composite Satisfaction Indices

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

Quality of Life Index ⬆
- 107
- 113
- 109
- 100

Perceptions Index ⬆
- 104
- 116
- 112
- 108
- 100

Major Services Index ⬆
- 103
- 112
- 105
- 101
- 104
- 100

Mobility Index ⬇
- 82
- 95
- 97
- 99
- 102
- 100

Customer Service Index
- 101
- 102
- 97
- 99
- 98
- 100

Public Safety Index ⬇
- 92
- 97
- 105
- 103
- 106
- 100

Streets and Infrastructure Index ⬇
- 94
- 94
- 97
- 101
- 117
- 100

Solid Waste Index ⬆
- 110
- 111
- 105
- 109
- 104
- 100

Parks and Recreation Index ⬆
- 124
- 117
- 108
- 107
- 105
- 100

Axis: 65 75 85 95 105 115 125 135

Legend: ■2018 □2016 □2014 ■2013 ■2011 □2009

Changes of 3 points or more are significant

Source: ETC Institute (2018)

Significantly higher than 2009: ⬆   **Significantly lower than 2009:** ⬇

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Short-Term Trends

Notable <u>Short-Term Increases</u> Since 2016
- ❑ Outdoor swimming facilities
- ❑ Walking trails in the city
- ❑ Street repair
- ❑ Quality of recreation programs/classes
- ❑ Household hazardous waste

Notable <u>Short-Term Decreases</u> Since 2016
- ❑ Access to affordable/quality housing
- ❑ Access to affordable/quality child care
- ❑ Arts and cultural programs
- ❑ Overall quality of storm drainage
- ❑ Access to affordable/quality health care

Long-Term Trends

Notable <u>Long-Term Increases</u> Since 2009
- ❑Parks and recreation system
- ❑Quality of economic development
- ❑Quality of recreation programs/classes
- ❑Walking trails in the city
- ❑The city as a place to work

Notable <u>Long-Term Decreases</u> Since 2009
- ❑Access to affordable/quality housing
- ❑Access to affordable/quality child care
- ❑Traffic enforcement
- ❑Police response time to emergencies
- ❑Maintenance of neighborhood streets

2018 Importance-Satisfaction Rating
City of Dallas
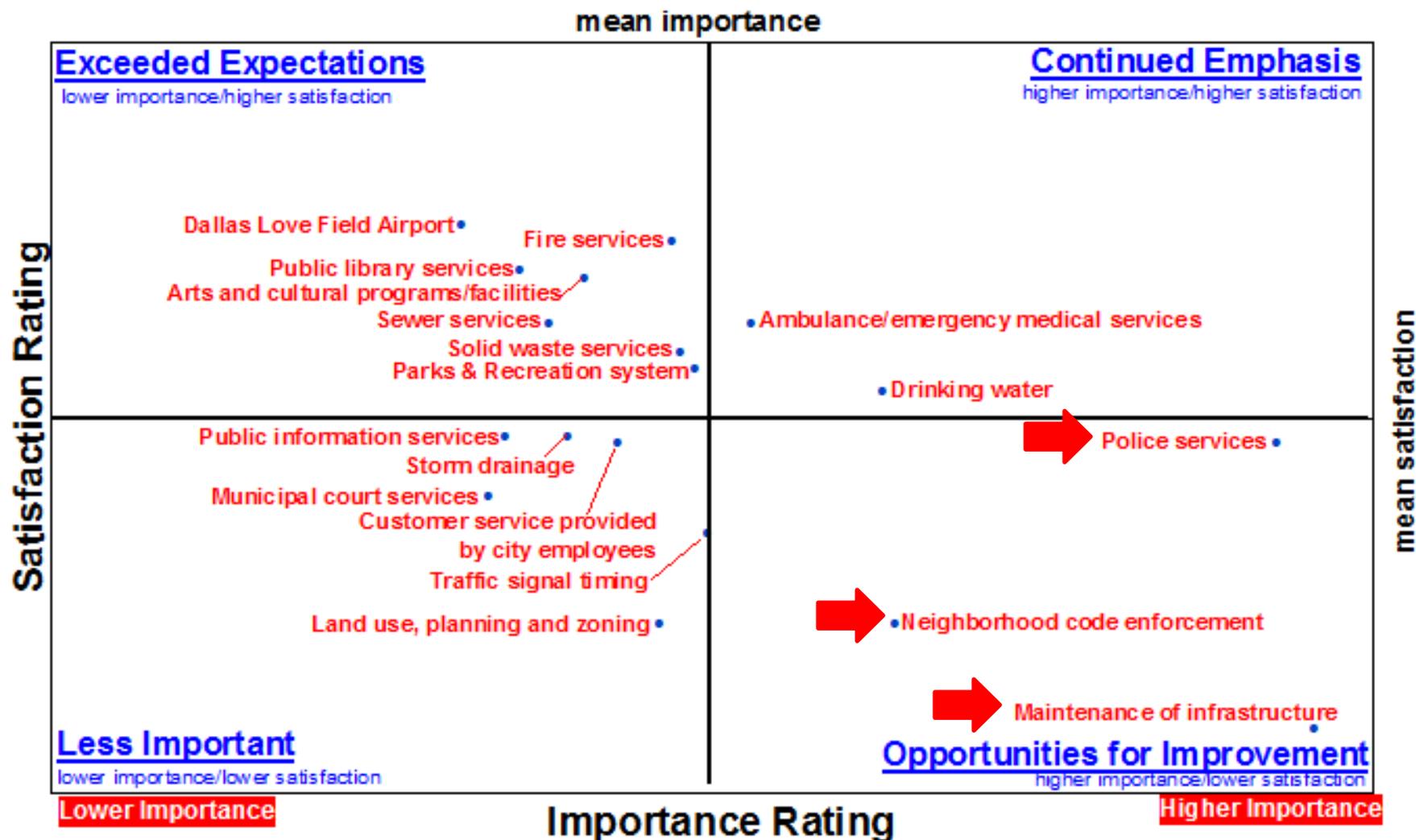## Major Categories of City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS >.20)						
Maintenance of infrastructure	55%	1	24%	18	0.4180	1
Police services	53%	2	62%	12	0.2014	2
High Priority (IS .10-.20)						
Neighborhood code enforcement	30%	3	37%	17	0.1890	3
Medium Priority (IS <.10)						
Land use, planning, and zoning	15%	10	38%	16	0.0930	4
Drinking water	29%	4	68%	9	0.0928	5
Traffic signal timing	18%	6	51%	15	0.0882	6
Parks and recreation system	18%	7	71%	8	0.0522	7
Customer service provided by city employees	13%	11	62%	13	0.0494	8
Ambulance/emergency medical services	21%	5	78%	6	0.0462	9
Solid waste services	17%	8	75%	7	0.0425	10
Storm drainage	10%	13	63%	10	0.0370	11
Municipal court services	5%	17	55%	14	0.0225	12
Public information services	6%	16	63%	11	0.0222	13
Sewer services	9%	14	78%	5	0.0198	14
Art and Cultural programs/facilities	11%	12	84%	4	0.0176	15
Fire services	16%	9	89%	2	0.0176	16
Public library services	7%	15	85%	3	0.0105	17
Dallas Love Field Airport	3%	18	91%	1	0.0027	18

Overall Priorities:

2018 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

Exceeded Expectations
lower importance/higher satisfaction

Continued Emphasis
higher importance/higher satisfaction

Satisfaction Rating

Dallas Love Field Airport•
Fire services•
Public library services•
Arts and cultural programs/facilities•
Sewer services•
Solid waste services•
Parks & Recreation system•

•Ambulance/emergency medical services

•Drinking water

Public information services•
Storm drainage
Municipal court services•
Customer service provided
by city employees
Traffic signal timing

Police services•

•Neighborhood code enforcement

Land use, planning and zoning•

Maintenance of infrastructure

Less Important
lower importance/lower satisfaction

Opportunities for Improvement
higher importance/lower satisfaction

mean satisfaction

Lower Importance

Importance Rating

Higher Importance

Source: ETC Institute (2018)

Summary and Conclusions

- Residents have a positive perception of the City
  - 72% rated the overall quality of life as "excellent" or "good"; only 4% gave a rating of "poor"

- Overall satisfaction with City services is 9% above the national average for large US cities

- Dallas is setting the standard for customer service among large U.S. cities

- Top priorities for residents were:
  - Infrastructure maintenance
  - Police services
  - Code enforcement

Questions?

THANK YOU