

City of Manassas Community Survey

2016

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Findings
Report

Submitted to the City of Manassas:

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City of Manassas 2016 Community Survey Executive Summary

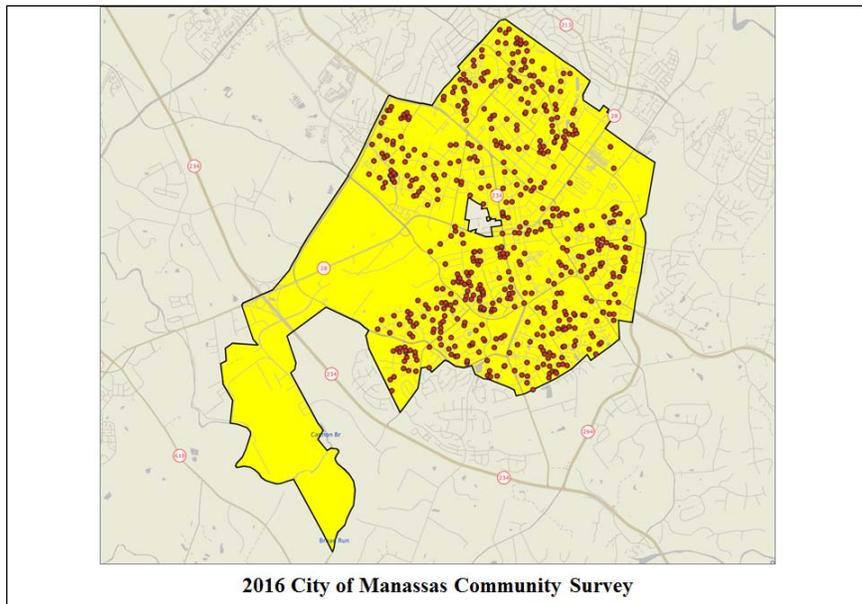
Overview and Methodology

During the summer and fall of 2016, ETC Institute administered a community survey for the City of Manassas. The purpose of the survey was to assess satisfaction with the delivery of major City services and to help determine priorities for the community as part of the City’s ongoing planning process. The data will also be used to improve existing services and to help determine future needs for the City of Manassas.

A seven-page survey was mailed to a stratified random sample of households in the City. Each survey packet contained a cover letter, a copy of the survey, and a postage-paid return envelope. Residents who received the survey were given the option of returning the survey by mail or completing it online. Ten days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the households that received the survey to encourage participation. The emails contained a link to the online version of the survey to make it easy for residents to complete the survey. To prevent people who were not residents of the City of Manassas from participating, everyone who completed the survey online was required to enter their home address prior to submitting the survey. ETC Institute then matched the addresses that were entered on-line with the addresses that were originally selected for the random sample. If the address from a survey completed online did not match one of the addresses selected for the sample, the online survey was not counted.

The goal was to receive at least 400 completed surveys. This goal was accomplished with a total of 595 households completing a survey. The results for the random sample of 595 households have a 95% level of confidence with a precision of at least +/- 4%.

To better understand how well services are being delivered in different parts of the City, the home address of respondents to the survey was geocoded. The map to the right shows the location of all survey respondents.





Don't knows. Since the number of “don't know” responses often reflects the utilization and awareness of city services, the percentage of “don't know” responses has been included with the tabular data in Section 6 of this report. When the “don't know” responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase “who had an opinion.”

This report contains:

- a summary of the methodology for administering the survey and major findings
- charts showing the overall results for most questions on the survey (Section 1)
- a benchmarking summary showing how the City of Manassas compares to national and regional averages (Section 2)
- importance-satisfaction analysis that identified priorities for investment (Sections 3)
- performance range charts showing how the City of Manassas compares to cities similar in size (Section 4)
- tabular data showing the overall results for all questions on the survey along with a copy of the survey instrument (Section 5 & 6)

Perceptions of the Community

Most residents have an overall positive perception of the City. Seventy-four percent (74%) of those surveyed, who had an opinion, indicated they were either “very satisfied” (21%) or “satisfied” (53%) with the overall quality of Manassas services; 72% gave positive ratings for the overall quality of life in the City, 71% gave positive ratings for the overall appearance of the City, and 71% gave positive ratings for the overall image of the City.

Overall Satisfaction with Major Categories of City Services

To help the City track its overall performance in major categories of City services, residents were asked to rate the City's overall performance in the following 19 major categories:

- Overall quality of police services
- Overall quality of fire and rescue services
- Overall quality of economic development
- Overall enforcement of City codes and ordinances
- Overall quality of park and recreation programs and facilities
- Overall flow of traffic and ease of getting around the City
- Overall maintenance of City streets, sidewalks, and infrastructure
- Overall maintenance of City buildings and facilities
- Overall quality of landscaping in parks, medians, and other public areas
- Overall quality of trash, recycling and yard waste services
- Overall quality of water and sewer utilities

- Overall quality of electric utility services
- Overall quality of social services
- Overall quality of public education
- Overall quality of library services
- Overall quality of Manassas Regional Airport services and events
- Overall quality of voter registration
- Overall effectiveness of communication with the community
- Overall quality of customer service you receive from City employees

The major categories of city services that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents, who had an opinion, were: overall quality of fire and rescue services (92%), the overall quality of police services (86%), the overall quality of electric utility services (75%), the overall quality of trash, recycling, and yard waste services (84%), the overall quality of water and sewer utilities (83%) and the quality of voter registration (76%). Residents were least satisfied with flow of traffic and ease of getting around the City (49%) and the quality of public education (51%). The flow of traffic and ease of getting around the City and the quality of public education were also the two services respondents think should receive the most emphasis over the next two years.

Satisfaction with Services within Major Categories

In addition to rating the City’s performance in major categories, residents were also asked to rate the City’s performance with the delivery of specific services within each of the major categories. The results for specific services that were assessed are described below and on the following pages.

- **Public Safety and Perceptions of Safety**

The highest levels of satisfaction with public safety within the City, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents, who had an opinion, were: the quality of local fire protection, (86%) the professionalism of fire and EMT employees (86%), how quickly fire and rescue respond to emergencies (85%) and the quality of local police protection (85%). The visibility of police in neighborhoods and the City’s efforts to prevent crime are the two items respondents selected that they believe should receive the most emphasis over the next two years.

Respondents indicated they feel most safe walking in their neighborhood during the day. Ninety-seven percent (97%) of respondents indicated they felt either “very safe” (72%) or “somewhat safe” (25%) walking in their neighborhoods during the day. Eighty-nine percent (89%) of respondents indicated overall they feel “very safe” (35%) or “somewhat safe” (54%), and 87% of respondents indicated they feel either “very safe” (39%) or “somewhat safe” (48%) in commercial and business areas of the city.

- **Transportation and Mobility**

The highest levels of satisfaction with transportation and mobility within the City, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents, who had an opinion, were: the maintenance of street signs and pavement markings (73%), the maintenance of streets in neighborhoods (68%), the availability of sidewalks (68%), and the ease of getting around the City (67%). Residents were least satisfied with the availability of biking lanes and amenities (41%). How traffic signal systems provide traffic flow and the ease of traveling from home to regional roadways are the two aspects of transportation and mobility within the City that respondents feel should receive the most emphasis over the next two years.

- **Community Appearance**

The highest levels of satisfaction with the appearance of the community, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents, who had an opinion, were: residential curbside recycling (85%), residential yard waste collection (84%), and residential garbage and bulk trash collection (81%). Respondents indicated that the enforcement of the cleanup of litter, debris and the enforcement of mowing and cutting of weeds and grass were the two items regarding community appearance that should receive the most emphasis over the next two years.

- **Planning and Economic Development**

The highest levels of satisfaction with the City’s planning and economic development, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents, who had an opinion, were: the City’s efforts to continue the revitalization of downtown (69%) and attracting visitors and promoting Historic Manassas (65%). Attracting and retaining full-time private sector jobs and the City’s efforts to improving existing commercial corridors were the two items respondents indicated should receive the most emphasis over the next two years.

- **Culture and Recreation**

The highest levels of satisfaction with culture and recreation services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents, who had an opinion, were: special events and festivals (82%), the proximity to parks and green spaces (75%), and the variety and quality of programs at Harris Pavilion (75%). The availability of walking and biking trails in the City is the item that respondents feel should receive the most emphasis over the next two years.

- **Utilities**

The highest levels of satisfaction with the City’s utility services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents, who had an opinion, were: the reliability of water services (91%), the reliability of sewer services (88%) and the reliability of City electric services (88%). Respondents

indicated the value they receive for water and wastewater utility rates is the aspect of the City's utility services that should receive the most emphasis over the next two years.

- **Health and Human Services**

The highest levels of satisfaction with health and human services, based upon the combined percentage of "very satisfied" and "satisfied" responses among residents, who had an opinion, were: the availability of services to families and children (45%) and the availability of services to seniors (42%). Respondents believe the City should focus the most emphasis on preserving and increasing affordable housing in the area over the next two years.

- **Public Communication and Outreach**

The highest levels of satisfaction with public communication and outreach, based upon the combined percentage of "very satisfied" and "satisfied" responses among residents, who had an opinion, were: the quality of the City's website (68%), the ease of access to information about city services (63%) and the quality of printed materials (59%).

Seventy percent (70%) of respondents indicated that the City's website (www.manassascity.org) is their primary source of information about City issues, services, and events. The City Connection newsletter and www.visitmanassas.org were the other two primary information sources.

- **Customer Service Characteristics**

The highest levels of satisfaction with City customer services based upon the combined percentage of "very satisfied" and "satisfied" responses among residents, who had an opinion, were: the courteousness and professionalism of employees (87%), overall satisfaction with customer experience (81%) and the response time of City employees (79%).

Overall Opinions

Respondents were asked to indicate their opinion with various aspects of the City. The following characteristics received the highest ratings based upon the combined percentage of "excellent" and "good" responses among residents, who had an opinion; the City as a place to live (81%), the City as a place to visit (71%), the overall quality of life (67%), and the City as a place for play and leisure (63%).

Factors Impacting Decision to Live in Manassas

Respondents indicated that the affordability of housing (57%), the proximity to family and friends (42%), the safety and security of the City (27%) and employment opportunities (20%) are the most important factors impacting their decision to live in Manassas. The quality of the public school system, safety and security of the City, and the affordability of housing were the



three most reasons for living in the City that should receive the most emphasis over the next two years.

Budget Issues

Respondents were asked to indicate their support for changing the service levels for services that are provided using general tax revenues. Education and police services were the two services that received the highest number of responses indicating support for an increase in services. Corrections and libraries received the lowest number of responses indicating support for an increase in services. However, corrections and libraries received the highest number of responses indicating that there should be no change in service. Health and human services and culture and recreation services received the highest percentage of responses indicating a support for reductions.

How the City of Manassas Compares to Other Communities Nationally

Satisfaction ratings for the City of Manassas **rated above the U.S. average in 37 of the 55 areas** that were assessed. The City of Manassas rated significantly higher than the U.S. average (difference of 5% or more) in 27 of these areas. Listed below are the comparisons between the City of Manassas and the U.S. average:

Service	Manassas	U.S.	Difference	Category
In commercial/business areas of the City	87%	64%	23%	Feeling of Safety
I was able to get my question/concern resolved	77%	56%	21%	Customer Service
Quality of customer service from City employees	75%	55%	20%	Major Categories of City Services
Maintenance of streets/sidewalks/infrastructure	69%	49%	20%	Major Categories of City Services
The response time was reasonable	79%	60%	19%	Customer Service
Overall quality of City services provided	74%	56%	18%	Perceptions
Condition of sidewalks	72%	55%	17%	Maintenance
Manassas employees were courteous and polite	87%	73%	14%	Customer Service
Overall feeling of safety	89%	76%	13%	Feeling of Safety
Opportunities to participate in local govt.	55%	43%	12%	Communication
Quality of police services	86%	74%	12%	Major Categories of City Services
In your neighborhood at night	73%	62%	11%	Feeling of Safety
In City parks	76%	65%	11%	Feeling of Safety
Quality of water and sewer utilities	83%	73%	10%	Major Categories of City Services
Residential curbside recycling	86%	76%	10%	Community Appearance
In your neighborhood during the day	97%	87%	10%	Feeling of Safety
Maintenance of neighborhood streets	68%	59%	9%	Maintenance
How quickly police respond to 911 emergencies	78%	69%	9%	Public Safety
Quality of trash, recycling, yard waste	84%	76%	8%	Major Categories of City Services
Availability of public transportation	63%	55%	8%	Community Appearance
Access to info about City services	63%	55%	8%	Communication
Effectiveness of communication with community	58%	50%	8%	Major Categories of City Services
Overall cleanliness of streets	76%	68%	8%	Maintenance
It was easy to find someone to address my request	76%	68%	8%	Customer Service
Residential garbage/bulk trash collection	84%	77%	7%	Community Appearance
City efforts to keep residents informed	57%	51%	6%	Communication
Quality of animal control	67%	62%	5%	Public Safety
As a place to visit	71%	67%	4%	Quality of Life
Overall appearance of the City	71%	67%	4%	Perceptions
City's efforts to prevent crime	65%	61%	4%	Public Safety
Quality of the City's website	68%	65%	3%	Communication
Quality of fire and rescue services	92%	89%	3%	Major Categories of City Services
Value received for City tax dollars/fees	50%	47%	3%	Perceptions
Adequacy of street lighting	65%	64%	1%	Maintenance
Ease of registering for programs	63%	62%	1%	Parks and Recreation
Clean-up of litter/debris on private property	50%	49%	1%	Community Appearance
As a City that is moving in the right direction	60%	59%	1%	Quality of Life
Overall quality of life in the City	72%	73%	-1%	Perceptions
How quickly fire & rescue responds to emergencies	85%	87%	-2%	Public Safety
Quality of Emergency Medical Services	82%	84%	-2%	Public Safety
As a place to work	56%	59%	-3%	Quality of Life
Flow of traffic and ease of getting around City	49%	52%	-3%	Major Categories of City Services
Visibility of police in neighborhoods	61%	64%	-3%	Public Safety
Visibility of police in retail	61%	64%	-3%	Public Safety
Walking/biking trails	50%	54%	-4%	Parks and Recreation
Enforcement of sign regulations	56%	60%	-4%	Community Appearance
Maintenance of street signs/pavement markings	73%	78%	-5%	Maintenance
Enforcing exterior maint. of residential property	47%	52%	-5%	Community Appearance
Enforcing mowing/cutting on private property	46%	51%	-5%	Community Appearance
Quality of parks and recreation programs/fac.	64%	69%	-5%	Major Categories of City Services
Athletic fields	58%	66%	-8%	Parks and Recreation
Quality of library services	70%	79%	-9%	Major Categories of City Services
Number of parks	60%	70%	-10%	Parks and Recreation
As a place to raise and educate children	59%	74%	-15%	Quality of Life
As a place to retire	41%	63%	-22%	Quality of Life

How the City of Manassas Compares to Other Communities Regionally

Satisfaction ratings for the City of Manassas **rated above the Mid-Atlantic regional average in 36 of the 55 areas** that were assessed. The City of Manassas rated significantly higher than the Mid-Atlantic regional average (difference of 5% or more) in 24 of these areas. Listed below are the comparisons between the City of Manassas and the Mid-Atlantic regional average:

Service	Manassas	Mid-Atlantic	Difference	Category
Quality of customer service from City employees	75%	52%	23%	Major Categories of City Services
In commercial/business areas of the City	87%	67%	20%	Feeling of Safety
I was able to get my question/concern resolved	77%	58%	19%	Customer Service
Quality of trash, recycling, yard waste	84%	68%	16%	Major Categories of City Services
Overall feeling of safety	89%	73%	16%	Feeling of Safety
Maintenance of streets/sidewalks/infrastructure	69%	55%	14%	Major Categories of City Services
Manassas employees were courteous and polite	87%	73%	14%	Customer Service
Overall quality of City services provided	74%	61%	13%	Perceptions
Quality of water and sewer utilities	83%	71%	12%	Major Categories of City Services
Condition of sidewalks	72%	61%	11%	Maintenance
The response time was reasonable	79%	68%	11%	Customer Service
In your neighborhood at night	73%	63%	10%	Feeling of Safety
Opportunities to participate in local govt.	55%	46%	9%	Communication
Quality of animal control	67%	59%	8%	Public Safety
Residential curbside recycling	86%	78%	8%	Community Appearance
Availability of public transportation	63%	55%	8%	Community Appearance
City efforts to keep residents informed	57%	49%	8%	Communication
In your neighborhood during the day	97%	90%	7%	Feeling of Safety
As a place to visit	71%	64%	7%	Quality of Life
Residential garbage/bulk trash collection	84%	78%	6%	Community Appearance
Access to info about City services	63%	57%	6%	Communication
In City parks	76%	71%	5%	Feeling of Safety
Adequacy of street lighting	65%	60%	5%	Maintenance
Quality of the City's website	68%	63%	5%	Communication
Quality of police services	86%	82%	4%	Major Categories of City Services
Quality of fire and rescue services	92%	89%	3%	Major Categories of City Services
Value received for City tax dollars/fees	50%	47%	3%	Perceptions
Ease of registering for programs	63%	60%	3%	Parks and Recreation
Walking/biking trails	50%	47%	3%	Parks and Recreation
Effectiveness of communication with community	58%	56%	2%	Major Categories of City Services
Overall cleanliness of streets	76%	74%	2%	Maintenance
Maintenance of neighborhood streets	68%	66%	2%	Maintenance
Clean-up of litter/debris on private property	50%	48%	2%	Community Appearance
As a City that is moving in the right direction	60%	58%	2%	Quality of Life
How quickly police respond to 911 emergencies	78%	76%	2%	Public Safety
As a place to work	56%	55%	1%	Quality of Life
Athletic fields	58%	58%	0%	Parks and Recreation
Flow of traffic and ease of getting around City	49%	50%	-1%	Major Categories of City Services
Overall appearance of the City	71%	73%	-2%	Perceptions
How quickly fire & rescue responds to emergencies	85%	88%	-3%	Public Safety
City's efforts to prevent crime	65%	68%	-3%	Public Safety
Visibility of police in neighborhoods	61%	64%	-3%	Public Safety
Maintenance of street signs/pavement markings	73%	76%	-3%	Maintenance
Enforcement of sign regulations	56%	59%	-3%	Community Appearance
It was easy to find someone to address my request	76%	79%	-3%	Customer Service
Quality of library services	70%	74%	-4%	Major Categories of City Services
Overall quality of life in the City	72%	76%	-4%	Perceptions
Quality of Emergency Medical Services	82%	86%	-4%	Public Safety
Visibility of police in retail	61%	65%	-4%	Public Safety
Enforcing exterior maint. of residential property	47%	51%	-4%	Community Appearance
Enforcing mowing/cutting on private property	46%	50%	-4%	Community Appearance
Quality of parks and recreation programs/fac.	64%	69%	-5%	Major Categories of City Services
Number of parks	60%	69%	-9%	Parks and Recreation
As a place to raise and educate children	59%	70%	-11%	Quality of Life
As a place to retire	41%	57%	-16%	Quality of Life



Investment Priorities

Recommended Priorities for the Next Two Years. In order to help the City identify investment priorities for the next two years, ETC Institute conducted an Importance-Satisfaction (I-S) analysis. This analysis examined the importance residents placed on each City service and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with City services over the next two years. If the City wants to improve its overall satisfaction rating, the City should prioritize investments in services with the highest Importance Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in Section 3 of this report.

Overall Priorities for the City by Major Category. This analysis reviewed the importance of and satisfaction with major categories of City services. This analysis was conducted to help set the overall priorities for the City. Based on the results of this analysis, the major services that are recommended as the top priorities for investment over the next two years in order to raise the City’s overall satisfaction rating are listed below:

- Flow of traffic and ease of getting around the City (IS=0.1974)
- Quality of public education (IS=0.1749)
- Quality of economic development (IS=0.1382)
- Enforcement of City codes and ordinances (IS=0.1119)

The table below shows the importance-satisfaction rating for all 19 major categories of City services that were rated.

2016 Importance-Satisfaction Rating City of Manassas Major Categories of City Services						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Flow of traffic & ease of getting around the City	39%	1	49%	19	0.1974	1
Quality of public education	36%	2	51%	18	0.1749	2
Quality of economic development	33%	3	59%	14	0.1382	3
Enforcement of City codes & ordinances	23%	4	52%	17	0.1119	4
Medium Priority (IS <.10)						
Effectiveness of communication with the community	15%	7	58%	15	0.0641	5
Maintenance of streets, sidewalks & infrastructure	20%	5	69%	11	0.0621	6
Quality of parks & rec programs & facilities	13%	8	64%	12	0.0453	7
Quality of social services	9%	9	55%	16	0.0412	8
Quality of police services	19%	6	86%	2	0.0264	9
Quality of landscaping parks, medians & other areas	6%	13	75%	8	0.0145	10
Quality of water & sewer utilities	7%	11	83%	5	0.0122	11
Quality of trash, recycling & yard waste services	7%	12	84%	4	0.0117	12
Quality of library services	4%	16	70%	10	0.0109	13
Quality of customer service you receive	4%	14	75%	9	0.0102	14
Quality of fire & rescue services	8%	10	92%	1	0.0067	15
Quality of electric utility services	4%	15	86%	3	0.0054	16
Quality of Manassas Regional airport services	1%	19	62%	13	0.0054	17
Quality of voter registration	2%	17	76%	6	0.0050	18
Maintenance of City buildings & facilities	2%	18	75%	7	0.0045	19