

# City of Manassas Community Survey

# 2018

*...helping organizations make better decisions since 1982*

Findings  
Report

**Submitted to the City of Manassas, VA**

**by:**

ETC Institute  
725 W. Frontier Lane,  
Olathe, Kansas  
66061

**November 2018**





# Contents

<b>Executive Summary</b> .....	i
<b>Section 1: Charts and Graphs</b> .....	1
<b>Section 2: Trend Charts</b> .....	21
<b>Section 3: Benchmarking Summary</b> .....	34
<b>Section 4: Importance-Satisfaction Analysis</b> .....	42
<b>Section 5: Performance Range Comparisons</b> .....	62
<b>Section 6: Tabular Data</b> .....	71
<b>Section 7: Survey Instrument</b> .....	135

# City of Manassas 2018 Community Survey

## Executive Summary

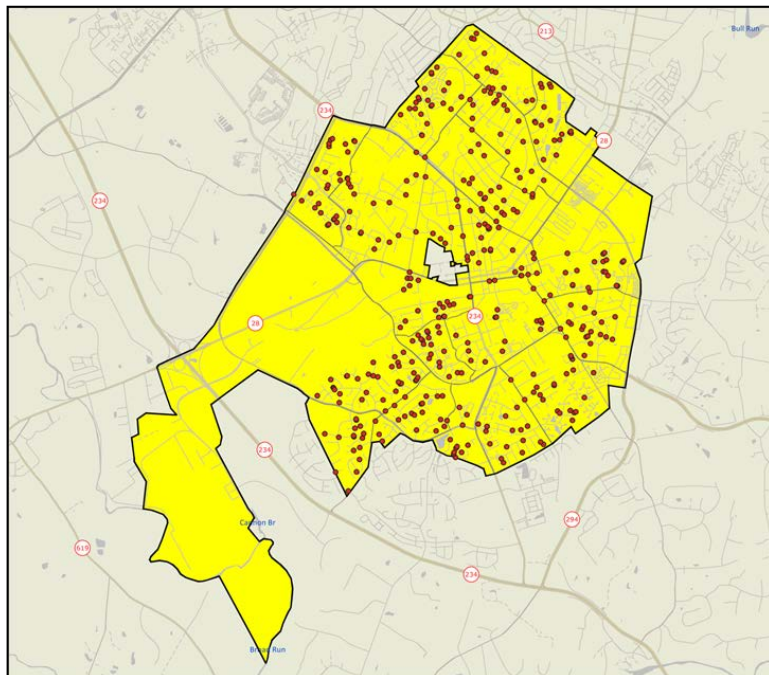
### Overview and Methodology

During the fall of 2018, 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 on-line. 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 on-line 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 on-line 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 on-line did not match one of the addresses selected for the sample, the on-line survey was not counted.

A total of 404 households completed the survey. The results for the random sample of 404 households have a 95% level of confidence with a precision of at least  $\pm 4.8\%$ .

**Location of Respondents.** 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 physical distribution of respondents to the resident survey based on the location of their home.



**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)
- trend charts showing survey results from 2014, 2016 and 2018 (Section 2)
- a benchmarking summary showing how the City of Manassas compares to national and regional averages (Section 3)
- importance-satisfaction analysis that identified priorities for investment (Sections 4)
- performance range charts showing the how the City of Manassas compares to cities similar in size (Section 5)
- tabular data showing the overall results for all questions on the survey along with a copy of the survey instrument (Section 6 & 7)

## Perceptions of the Community

Most residents have an overall positive perception of the City. Seventy-three percent (73%) of those surveyed, who had an opinion, indicated they were either “very satisfied” (20%) or “satisfied” (53%) with the overall quality of Manassas services; 71% gave positive ratings for the overall quality of life in the City, 71% gave positive ratings for the overall appearance of the City, and 68% 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 (90%), the overall quality of police services (84%), the overall quality of electric utility services (84%), the overall quality of trash, recycling, and yard waste services (83%), the quality of water and sewer utilities (80%), and the quality of voter registration (76%). Residents were least satisfied with flow of traffic and ease of getting around the City (43%) and the quality of public education (46%). 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: professionalism of fire and EMT employees (88%), the quality of local fire protection (87%), how quickly fire and rescue respond to emergencies (85%) and the quality of Emergency Medical Services (84%). 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-six percent (96%) of respondents indicated they felt either “very safe” (75%) or “somewhat safe” (21%) walking in their neighborhoods during the day. Eighty-nine percent (89%) of respondents indicated overall they feel “very safe” (39%) or “somewhat safe” (50%), and 86% of respondents indicated they feel either “very safe” (39%) or “somewhat safe” (47%) 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 (71%), the maintenance of streets in neighborhoods (66%), the adequacy of street lighting (65%), and the ease of getting around the City (65%). Residents were least satisfied with the availability of biking lanes and amenities (39%). 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 (83%), residential garbage and bulk trash collection (82%), and residential yard waste collection (81%). Respondents indicated that the enforcement of the cleanup of litter and 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%). Efforts to manage and plan for growth and development and 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 (81%), the proximity to parks and green spaces (78%), and the variety and quality of programs at Harris Pavilion (77%). 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: how quickly power is restored after an outage (89%), the reliability of water services (89%), 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 (40%) and the availability of services to seniors (39%). Respondents believe the City should focus the most emphasis on the availability of services to seniors 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 (64%), the ease of access to information about city services (60%) and efforts to keep residents informed about local issues (53%).

Sixty percent (60%) of respondents indicated that the City’s website ([www.manassascity.org](http://www.manassascity.org)) is their primary source of information about City issues, services, and events. The City Connection newsletter and Facebook were the other two primary information sources.

- **Customer Service Characteristics**

The highest levels of satisfaction with City customer service, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents, who had an opinion, were: the courteousness and professionalism of employees (83%), the ease of finding someone to address requests (74%), and overall satisfaction with customer experience (73%).

## 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 (72%), the overall quality of life (68%), and the overall image of the City (63%).

## Factors Impacting Decision to Live in Manassas

Respondents indicated that the proximity to employment and the Washington, D.C. region (51%), the affordability of housing (50%), and the proximity to family and friends (40%) were the most important factors impacting their decision to live in Manassas. The quality of the public school system, the affordability of housing, and safety and security of the City were the top 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 supporting an increase in services. Corrections and community appearance received the highest number of responses indicating that there should be no change in service. Libraries and Development 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 50 of the 65 areas** that were assessed. The City of Manassas rated significantly higher than the U.S. average (difference of 5% or more) in 40 of these areas. Listed below are the comparisons between the City of Manassas and the U.S. average:

Service	Manassas	U.S.	Difference	Category
Quality of customer service you receive	72	45	27	Major City Services
Maintenance of streets, sidewalks & infrastructure	66	41	25	Major City Services
Reliability of water services	89	64	25	Utilities
Quality of City services	73	50	23	Perceptions of the City
Condition of sidewalks	67	46	21	Community Appearance
I was able to get my question/concern resolved	71	51	20	Customer Service
Reliability of sewer services	85	66	19	Utilities
Reliability of stormwater systems	75	56	19	Utilities
Opportunities to participate in local government	53	34	19	Public Communication & Outreach
Maintenance of streets in your neighborhood	66	48	18	Transportation & Mobility
Quality of trash, recycling & yard waste services	83	67	16	Major City Services
Quality of water & sewer utilities	80	64	16	Major City Services
Availability of public transit options	60	44	16	Transportation & Mobility
How quickly police respond to 911 emergencies	79	64	15	Public Safety
Ease of access to information about City services	60	45	15	Public Communication & Outreach
Quality of police services	84	70	14	Major City Services
Maintenance of City buildings & facilities	76	62	14	Major City Services
Residential yard waste collection	81	67	14	Community Appearance
Employees are courteous/professional	83	69	14	Customer Service
Quality of local police protection	83	70	13	Public Safety
Residential curbside recycling	83	70	13	Community Appearance
As a place to visit	72	59	13	Overall Opinion of the City
Maintenance of street signs/pavement markings	71	59	12	Transportation & Mobility
Effectiveness of communication with the community	59	48	11	Major City Services
The response time was reasonable	71	60	11	Customer Service
As a place to live	81	70	11	Overall Opinion of the City
Overall cleanliness of streets	71	61	10	Community Appearance
Adequate street lighting	65	56	9	Transportation & Mobility
Enforcing mowing & cutting of weeds & grass	48	39	9	Community Appearance
It was easy to find someone to address my request	74	65	9	Customer Service
Overall appearance of the City	71	63	8	Perceptions of the City
Value received for tax dollars and fees	46	38	8	Perceptions of the City
Efforts to keep you informed about local issues	53	45	8	Public Communication & Outreach
Quality of fire & rescue services	90	83	7	Major City Services
City's efforts to prevent crime	61	54	7	Public Safety
Residential garbage & bulk trash collection	82	75	7	Community Appearance
Taste/odor of your drinking water	74	68	6	Utilities
Enforcing maintenance of business property	56	51	5	Community Appearance
Enforcing the maintenance of residential property	47	42	5	Community Appearance
As a city that is moving in the right direction	56	51	5	Overall Opinion of the City
Overall image of the City	68	64	4	Perceptions of the City
Quality of local fire protection	87	83	4	Public Safety
Quality of Animal Control	62	58	4	Public Safety
Enforcing the cleanup of litter & debris	47	43	4	Community Appearance
Quality of City's website	64	60	4	Public Communication & Outreach
How quickly fire & rescue responds	85	82	3	Public Safety
Quality of Emergency Medical Services	84	81	3	Public Safety
As a place to work	56	53	3	Overall Opinion of the City
Appearance/maintenance of City parks	71	70	1	Community Appearance
Enforcing sign regulations	54	53	1	Community Appearance
Quality of parks & rec programs & facilities	63	63	0	Major City Services
Visibility of police in neighborhoods	58	59	-1	Public Safety
Quality & number of athletic fields	56	58	-2	Culture & Recreation
Ease of registering for programs	60	63	-3	Culture & Recreation
Quality of life in the City	71	75	-4	Perceptions of the City
Number of parks & open spaces	61	66	-5	Culture & Recreation
Enforcement of City codes & ordinances	48	54	-6	Major City Services
City's efforts to enforce local traffic laws	58	64	-6	Public Safety
Quality of library services	67	74	-7	Major City Services
Visibility of police in retail areas	53	60	-7	Public Safety
Flow of traffic & ease of getting around the City	43	52	-9	Major City Services
Quality of public education	46	56	-10	Major City Services
As a place to raise & educate children	55	70	-15	Overall Opinion of the City
Availability of walking/biking trails	45	64	-19	Culture & Recreation
As a place to retire	39	58	-19	Overall Opinion of the City

## How the City of Manassas Compares to Other Communities Regionally

Satisfaction ratings for the City of Manassas **rated above the Atlantic regional average in 46 of the 65 areas** that were assessed. The City of Manassas rated significantly higher than the East Coast regional average (difference of 5% or more) in 38 of these areas. Listed below are the comparisons between the City of Manassas and the Atlantic regional average:

Service	Manassas	Atlantic Region	Difference	Category
Quality of customer service you receive	72	43	29	Major City Services
Reliability of stormwater systems	75	47	28	Utilities
Reliability of water services	89	64	25	Utilities
I was able to get my question/concern resolved	71	48	23	Customer Service
Maintenance of streets, sidewalks & infrastructure	66	44	22	Major City Services
Reliability of sewer services	85	63	22	Utilities
Quality of City services	73	52	21	Perceptions of the City
Maintenance of City buildings & facilities	76	56	20	Major City Services
Maintenance of streets in your neighborhood	66	47	19	Transportation & Mobility
Condition of sidewalks	67	49	18	Community Appearance
Availability of public transit options	60	43	17	Transportation & Mobility
Opportunities to participate in local government	53	36	17	Public Communication & Outreach
Quality of water & sewer utilities	80	64	16	Major City Services
Enforcing mowing & cutting of weeds & grass	48	33	15	Community Appearance
Quality of trash, recycling & yard waste services	83	70	13	Major City Services
Employees are courteous/professional	83	70	13	Customer Service
How quickly police respond to 911 emergencies	79	67	12	Public Safety
Maintenance of street signs/pavement markings	71	59	12	Transportation & Mobility
Residential curbside recycling	83	71	12	Community Appearance
Quality of police services	84	73	11	Major City Services
Residential yard waste collection	81	70	11	Community Appearance
Overall cleanliness of streets	71	60	11	Community Appearance
As a place to visit	72	61	11	Overall Opinion of the City
Quality of local police protection	83	73	10	Public Safety
Effectiveness of communication with the community	59	50	9	Major City Services
Adequate street lighting	65	56	9	Transportation & Mobility
Residential garbage & bulk trash collection	82	74	8	Community Appearance
Ease of access to information about City services	60	52	8	Public Communication & Outreach
As a place to live	81	73	8	Overall Opinion of the City
Overall appearance of the City	71	64	7	Perceptions of the City
The response time was reasonable	71	64	7	Customer Service
Value received for tax dollars and fees	46	40	6	Perceptions of the City
Enforcing the maintenance of residential property	47	41	6	Community Appearance
Enforcing the cleanup of litter & debris	47	41	6	Community Appearance
Efforts to keep you informed about local issues	53	47	6	Public Communication & Outreach
Quality of Animal Control	62	57	5	Public Safety
Enforcing maintenance of business property	56	51	5	Community Appearance
Taste/odor of your drinking water	74	69	5	Utilities
It was easy to find someone to address my request	74	70	4	Customer Service
Quality of fire & rescue services	90	87	3	Major City Services
Overall image of the City	68	65	3	Perceptions of the City
Quality of Emergency Medical Services	84	81	3	Public Safety
Enforcing sign regulations	54	52	2	Community Appearance
Quality & number of athletic fields	56	54	2	Culture & Recreation
City's efforts to prevent crime	61	60	1	Public Safety
Quality of City's website	64	63	1	Public Communication & Outreach
Quality of local fire protection	87	87	0	Public Safety
City's efforts to enforce local traffic laws	58	58	0	Public Safety
As a city that is moving in the right direction	56	56	0	Overall Opinion of the City
Flow of traffic & ease of getting around the City	43	44	-1	Major City Services
How quickly fire & rescue responds	85	87	-2	Public Safety
Appearance/maintenance of City parks	71	73	-2	Community Appearance
Quality of life in the City	71	74	-3	Perceptions of the City
Visibility of police in neighborhoods	58	61	-3	Public Safety
As a place to work	56	59	-3	Overall Opinion of the City
Quality of parks & rec programs & facilities	63	68	-5	Major City Services
Ease of registering for programs	60	65	-5	Culture & Recreation
Quality of library services	67	75	-8	Major City Services
Enforcement of City codes & ordinances	48	56	-8	Major City Services
Quality of public education	46	54	-8	Major City Services
Number of parks & open spaces	61	71	-10	Culture & Recreation
As a place to raise & educate children	55	68	-13	Overall Opinion of the City
Visibility of police in retail areas	53	69	-16	Public Safety
As a place to retire	39	59	-20	Overall Opinion of the City
Availability of walking/biking trails	45	68	-23	Culture & Recreation

## 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 the 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=0.2354)
- Quality of public education (IS=0.1912)
- Quality of economic development (IS=0.1294)

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

2018 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
<b>Very High Priority (IS &gt;.20)</b>						
Flow of traffic & ease of getting around the City	41%	1	43%	19	0.2354	1
<b>High Priority (IS .10-.20)</b>						
Quality of public education	35%	2	46%	18	0.1912	2
Quality of economic development	29%	3	56%	15	0.1294	3
<b>Medium Priority (IS &lt;.10)</b>						
Enforcement of City codes & ordinances	18%	6	48%	17	0.0936	4
Maintenance of streets, sidewalks & infrastructure	21%	4	66%	11	0.0697	5
Effectiveness of communication with the community	17%	7	59%	14	0.0693	6
Quality of social services	9%	9	52%	16	0.0451	7
Quality of parks & rec programs & facilities	11%	8	63%	13	0.0403	8
Quality of police services	20%	5	84%	2	0.0314	9
Quality of customer service you receive	8%	11	72%	9	0.0210	10
Quality of trash, recycling & yard waste services	7%	12	83%	4	0.0126	11
Quality of voter registration	5%	14	76%	6	0.0113	12
Quality of water & sewer utilities	6%	13	80%	5	0.0112	13
Quality of landscaping parks, medians & other areas	4%	15	73%	8	0.0108	14
Quality of library services	3%	16	67%	10	0.0106	15
Quality of fire & rescue services	9%	10	90%	1	0.0087	16
Maintenance of City buildings & facilities	2%	17	76%	7	0.0058	17
Quality of Manassas Regional airport services	1%	19	63%	12	0.0052	18
Quality of electric utility services	2%	18	84%	3	0.0032	19