

STUDY SESSION

ETC Institute Presentation – Community Survey Report

CITY HALL, Fifth Floor
6801 Delmar Blvd., University City, Missouri 63130
Monday, February 26, 2024
5:30 p.m.

AGENDA

1. **MEETING CALLED TO ORDER**

At the Study Session of the City Council of University City held on Monday, February 26, 2024, in the absence of Mayor Terry Crow, Mayor Pro Tem Bwayne Smotherson called the meeting to order at 5:30 p.m.

In addition to the Mayor Pro Tem, the following members of Council were present:

Councilmember Stacy Clay
Councilmember Aleta Klein
Councilmember Steven McMahon
Councilmember Jeffrey Hales
Councilmember Dennis Fuller

Also in attendance were City Manager, Gregory Rose; City Attorney, John F. Mulligan, Jr., and Assistant Director of Community Research at the ETC Institute, Ryan Murray.

2. **CHANGES TO THE REGULAR AGENDA**

None

3. **ETC INSTITUTE PRESENTATION – COMMUNITY SURVEY REPORT**

Mr. Rose stated for the past 6 years Council has authorized a biannual Community Survey to understand residents' thoughts on the services provided by the City. Input was provided by residents throughout each Ward and the results are statistically valid with a 95% confidence rating. Tonight, the findings from this survey will be presented by Ryan Murray.


Mr. Murray apologized for not being able to attend the previously scheduled Study Session and thanked everyone for accommodating him this evening.

Background

ETC Institute is located in Olathe, Kansas, and is a National Leader in Market Research for Local Governmental Organizations. Its mission for over 40 years has been to help municipal governments gather and use survey data to enhance organizational performance. Since 2006, ETC has worked in more than 1,000 cities in 49 states and surveyed more than 3 million people.


Purpose

- To gather objective feedback from residents on city services to better serve residents
- To compare the City's performance to U.S. and Regional Averages
- To help determine priorities for the City using Importance-Satisfaction Analysis

 ***Importance-Satisfaction Analysis is a roadmap based on the survey results. It is meant to develop priorities for improvements or investments. So even if 100% of residents were satisfied with all of the ratings ETC would still develop some priorities for improvement based on the inherent design of the survey.***

Methodology

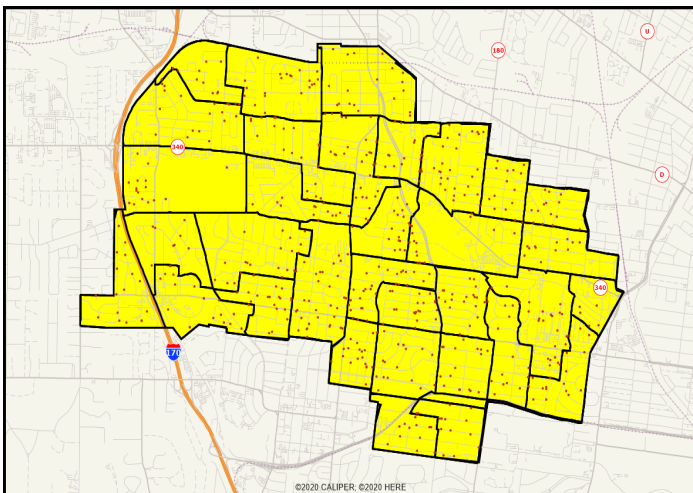
Survey Description	Method of Administration	Sample Size	Margin of Error
3rd Resident Survey Conducted by ETC	By mail & online to a random sample of households Surveys took approximately 16-18 minutes to complete	Goal: 600 surveys Completed: 608	+/- 4.0% at the 95% level of confidence

 **ETC follows up with residents until they have reached the geographic and demographic representation within the results.**

Location of Survey Respondents

- Good representation of responses throughout the City
- Home addresses of all respondents are geocoded to the block level to ensure anonymity
- In addition to geographic representation, ETC Institute also achieved a good demographic representation in the results

Responses were mapped on a map of the City based on the mean rating within each zone. Some census block groups may have fewer respondents, which means that the mean ratings should be taken with a grain of salt, i.e. large areas where there are no residential addresses.



Mr. Murray stated one of the most important things ETC can do for its clients is provide context to their results using national and regional benchmarking. The U.S. and Plains Averages were used in this survey, which gives you an apples-to-apples comparison of other communities and the United States.

Bottom Line Up Front

Residents continue to have a very positive perception of the City

- 77% of respondents gave “**excellent**” or “**good**” ratings when asked to rate the quality of life in the City
- 71% of respondents gave “**excellent**” or “**good**” ratings when asked to rate the overall quality of services provided by the City which was over 20 percentage points above both the regional and national averages

Satisfaction with City services is higher in University City than in other communities

- The City rated above the U.S. and Plains Regional average in 32 of the 41 areas assessed or (78%)

 **The overall quality of customer service and services provided by the City were among the top performers compared to the U.S. and Plains Regional average.**

Perceptions

Q3. Community Perception Ratings

*By the percentage of respondents, using a 5-point scale where 5 means **Excellent** and 1 means **Poor**. (Don't know responses are excluded)*

	Excellent	Good	Neutral	Below-Average	Poor
Quality of life	24%	53%	18%	396	1%
Quality of services Provided	19%	52%	22%	596	2%
Quality of new commercial developments	22%	42%	22%	12%	4%
Quality of special/cultural events	21%	42%	26%	8%	3%
Image of the City	16%	45%	24%	13%	3%
Recreational opportunities	19%	41%	24%	14%	3%
Feeling of safety	16%	43%	25%	11%	4%
Appearance	15%	44%	26%	13%	2%
Quantity of special/cultural events	19%	39%	28%	11%	4%
Planning/managing redevelopment	16%	38%	29%	13%	4%
Value received for tax dollars/fees	12%	37%	27%	18%	6%
Quality of new residential developments	13%	31%	36%	16%	5%
Quality/efficiency of plan review/permits	11%	31%	39%	13%	5%

 **Neutral is really a passing grade; not a positive or negative sentiment**

Q21. How Likely Would You Be to Recommend U City to a Friend or Colleague?

*By the percentage of respondents, using a 5-point scale where 5 means **Likely** and 1 means **Not Likely At All**. (Don't know responses are excluded)*

	Very Likely	Likely	Neutral	Not Likely	Not Likely At All
As a place to live	44%	40%	12%	4%	
As a place to visit	44%	40%	13%	3%	1%
Overall quality of life	36%	47%	15%	3%	
As a place to work	29%	40%	22%	9%	1%
As a place to retire	33%	36%	19%	10%	2%
As a place to raise children	34%	32%	20%	12%	3%
As a place to build a business	26%	35%	28%	10%	1%

Q22. Agreement with How Fairly & Impartially Each City Department Treats All Members of the Public.

*By the percentage of respondents, using a 5-point scale where 5 means **Strongly Agree** and 1 means **Strongly Disagree**. (Don't know responses are excluded)*

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Fire and EMS	40%	40%	17%	13%	1%
Police	34%	40%	14%	8%	5%
Trash, Recycling & Yard Waste	31%	43%	18%	7%	2%
Parks and Recreation	27%	45%	21%	6%	1%
Public Works and Street Maintenance	22%	35%	25%	12%	6%
Building Permits	20%	32%	27%	16%	5%
Code Enforcement	19%	26%	30%	21%	5%

 **Building Permits and Code Enforcement typically deal with a lot of personal issues.**

Q1. Satisfaction with Major Categories of Services

By the percentage of respondents, using a 5-point scale where 5 means **Very Satisfied** and 1 means **Very Dissatisfied**. (Don't know responses are excluded)

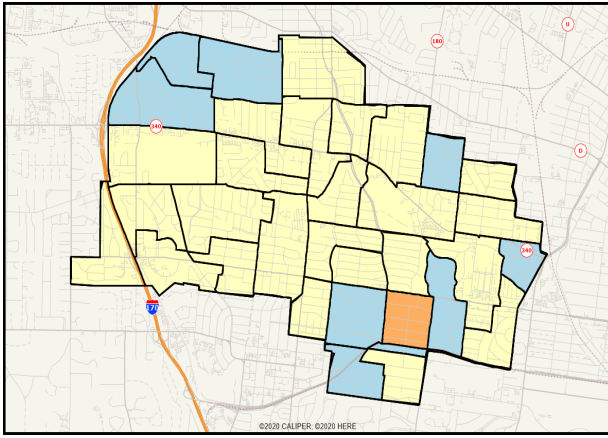
	Very Satisfied	Satisfied	Neutral	Dissatisfied	Strongly Dissatisfied
Public Safety	36%	45%	16%	3%	1%
Parks & Recreation Programs/Facilities	26%	45%	21%	7%	2%
Traffic and congestion management	20%	47%	26%	6%	1%
Customer service from City employees	24%	38%	27%	9%	3%
Effectiveness of City/resident communications	19%	40%	26%	13%	2%
Maintenance of City buildings/facilities	15%	43%	33%	7%	2%
• Enforcement of Codes & Ordinances	16%	34%	31%	15%	5%
• Maintenance of streets	10%	34%	28%	20%	8%

 *Bulleted categories represent areas with the highest opportunity for improvement.*

Top Priorities Based on the Importance-Satisfaction Analysis

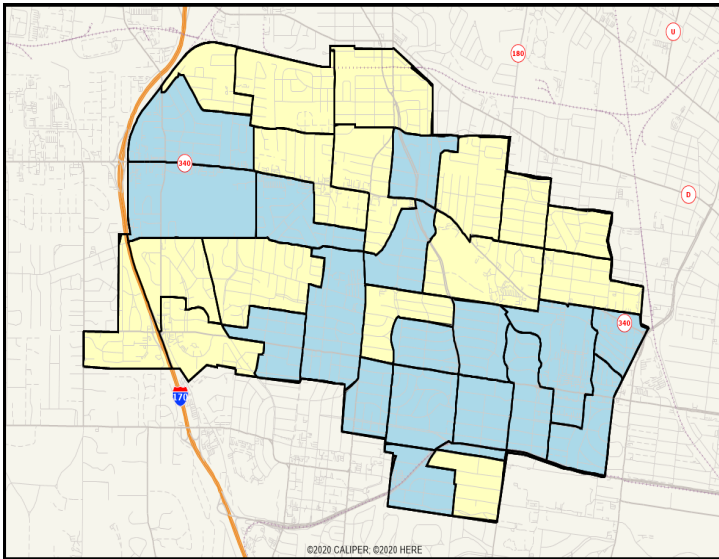
Maintenance of Streets

- This area was determined to be the top priority for improvement
 - Areas in blue show general levels of satisfaction.
 - Areas displayed in yellow show general levels of neutral ratings.
 - Any areas displayed in orange or red show general levels of dissatisfaction



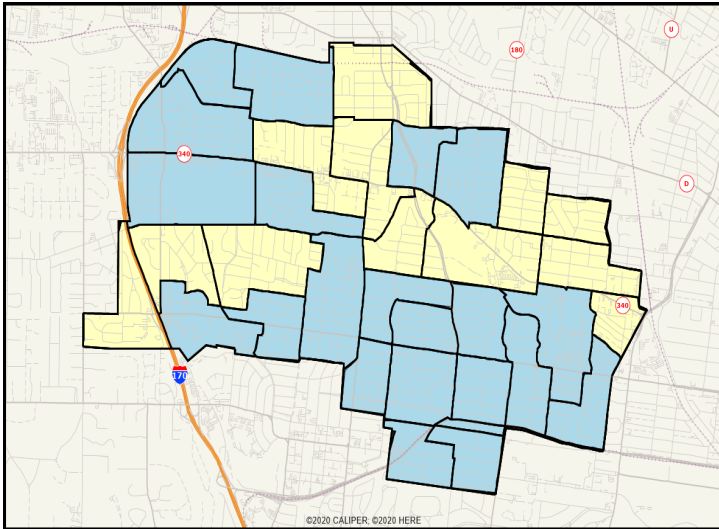
Enforcement of City Codes and Ordinances

- This area was determined to be the second highest priority for improvement based on the Importance-Satisfaction Analysis
 - Areas in blue show general levels of satisfaction.
 - Areas displayed in yellow show general levels of neutral ratings.
 - Any areas displayed in orange or red show general levels of dissatisfaction



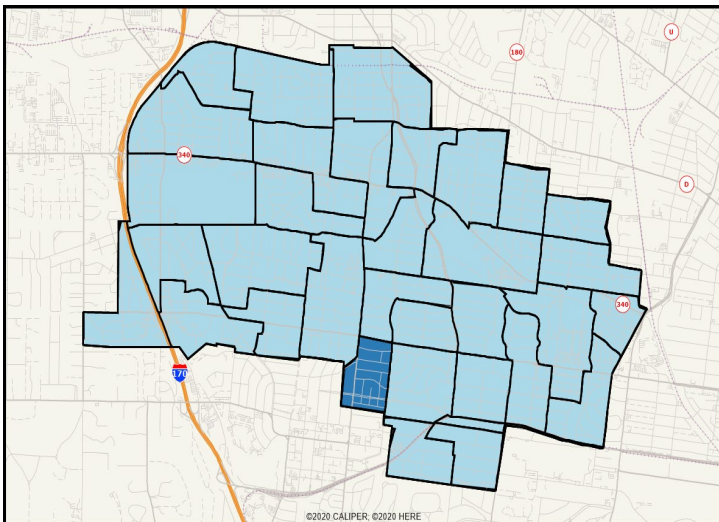
Effectiveness of Communication

- This area was determined to be the third highest priority for improvement based on the Importance-Satisfaction Analysis
 - Areas in blue show general levels of satisfaction.
 - Areas displayed in yellow show general levels of neutral ratings.
 - Any areas displayed in orange or red show general levels of dissatisfaction – there are none.



Parks and Recreation Programs and Facilities

- This area was determined to be the fourth highest priority for improvement based on the Importance-Satisfaction Analysis. While satisfaction is very high for this item, the importance ratings are elevated.
 - Areas in blue show general levels of satisfaction.
 - Areas displayed in yellow show general levels of neutral ratings.
 - Any areas displayed in orange or red show general levels of dissatisfaction – there are none.



Benchmarks

The City Rates MUCH Higher Than Other Communities

- The City’s survey contained 41 questions that were directly comparable to ETC Institute’s benchmarking databases
- The U.S. Average is based on a national survey administered during the summer of 2023 to a random sample of more than 10,000 U.S. residents
- The Plains Average is based on a national survey administered during the summer of 2023 to a random sample of more than 2,000 residents living in Missouri, Kansas, Iowa, Minnesota, Nebraska, North Dakota, South Dakota, Oklahoma, and Wisconsin
- University City rated above the U.S. and Plains Average in 32 of the 41 areas assessed
- Significant differences are considered those of 4 percentage points or more

- The City rated significantly higher than the U.S. Average in 26 of the 41 areas assessed (63.4%)
- The City rated significantly higher than the Plains Average in 29 of the 41 areas assessed (70.7%)

✚ The major City services that were compared rated significantly above in every area

✚ Community perception is rated above in many of the key areas, and right along the line with the U.S. and Plains Averages in the areas of feeling safe in the City; appearance of the City, and effectiveness of City communications. So, when looking at the comparisons, the City is performing exceptionally well.

Priorities for Improvement

Q2. City Services That Should Receive the Most Emphasis Over the Next Two Years; (by the sum percentage of respondents' top three choices)

Maintenance of City Streets	64.1%
Public safety services	44.0%
Parks and recreation programs/facilities	39.3%
Enforcement of codes/ordinances	34.2%
Effectiveness of City/resident communications	29.1%

Customer service by City employees	19.3%
Maintenance of City buildings/facilities	16.9%
Traffic and congestion management	15.1%

Overall Satisfaction with Major City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	I-S Rating	I-S Rank
Maintenance of City Streets	64%	1	44%	8	0.3583	1
Enforcement of Codes/ordinances	34%	4	50%	7	0.1727	2
Effectiveness of City & resident Communications	29%	5	59%	5	0.1199	3
Parks and recreation Programs/Facilities	39%	3	71%	2	0.1151	4
Public safety services	44%	2	81%	1	0.0832	5
Customer service From City employees	19%	6	62%	4	0.0737	6
Maintenance of City Buildings/facilities	17%	7	58%	6	0.0715	7
Traffic and congestion Management	15%	8	67%	3	0.0504	8

I-S Ratings .1000 or Greater are considered a High Priority for investment for the next two years.

- The green item is an area that the City could invest heavily in, but it is unlikely to have a dramatic impact.
- The orange items are areas where if there was a slight reduction in the quality of service or a slight increase in the most important ranking, you could potentially see them break the .1000 threshold, making them high opportunities for improvement.
- The items in blue and pink are most likely to give you the biggest bang for your buck in terms of investments. If the City is able to increase satisfaction in these areas the perceptions will continue to increase.

Communication

Communication is a key area to ensure that the City continues to achieve great results.

When putting new improvements into action make sure that you are engaging your residents; and that they understand what improvements are being made, or the steps you're taking to improve some of these survey results.

Satisfaction with City Communication

This has a major impact on the overall quality of the City's delivery of services.

- As communication scores rise, so does generalized satisfaction
- As communication scores wane, so does generalized satisfaction

The categories included:

- Availability of information about City programs and services
- City's efforts to inform about local issues
- How open the City is to public involvement and input from residents
- Quality of the City's website

 ***U City performed exceptionally well in these areas when compared to the Plains and national averages***

Q15. Frequency Respondent Uses the Following City Communication Methods

One reason U City is receiving such high communication scores is because of these primary sources of information.

ROARS newsletter	37%
NextDoor	17%
City website	13%
Parks & Recreation Guide	12%
Facebook	9%
Instagram	5%
Civic Plus Notify Me	3%
Twitter	1%

Q15. Effectiveness of Communication Methods to Inform Residents about City Services, Programs, and Projects.

ROARS newsletter	49%
City website	34%
NextDoor	33%
Parks & Recreation Guide	31%
Instagram	29%
Facebook	27%
Civic Plus Notify Me	27%
Twitter	15%

 ***Overall, the City is in a really advantageous position with ROARS and the City website being the primary sources of information for residents.***

Summary

- Residents continue to have a very positive perception of the City
- Satisfaction is Much Higher in University City than in other communities
- Overall, the City performed exceptionally well – especially when comparing the City's performance to ETC Institute's Benchmarks
- Many of the areas rated on this survey are directly related to the performance of key staff members and they deserve a lot of credit for maintaining these high ratings

The City should focus on the additional analysis of the survey results to pull out priorities for improvement that will help serve the future and evolving needs of residents in the City to ensure the high ratings received continue.

Councilmember Clay posed the following questions to Mr. Murray:

Q. Do you work with any other municipalities in the St. Louis metropolitan area?

A. *We have worked with Clayton, St. Louis County, Wentzville, and Maryland Heights. If you're interested, I can provide you with information on a localized average.*

Q. Yes, that would be great. Did you say how many responses there were from each Ward in your geographic distribution?

A. *No. But if the City has GIS shape files showing the Wards we can distribute the responses across that and run a frequency table to show the distribution.*

Councilmember Clay posed the following questions to Mr. Rose:

Q. It seems like the City's print modes of communication are the most effective. Were things like Explore U City and some of the other emailed communications subsumed under Civic Plus Notify Me?

A. *We did not survey those new communication platforms because we wanted to allow the community an opportunity to become more familiar with them. So, they will be included in the next survey.*

Q. What conclusions is your team drawing from this survey?

A. *I think the results confirmed what we have known all along; especially as it relates to street, sidewalk maintenance, and code enforcement. Although there may be a need to drill down in some respects, to determine what the survey results on code enforcement means because it can be different for each community. But at this point, the belief is that residents are referring to their desire to ensure that high quality is maintained throughout the City's housing stock. So, it will be important for Council to continue investing resources into streets, sidewalks, and code enforcement, and staff will be recommending modifications in these areas during the budget process.*

Councilmember Hales posed the following questions to Mr. Murray:

Q. Are print communications in other cities equally as strong as these results?

A. *Across the country in parks and recreation organizations we are combating this perception that there is a need to go to digital, but fewer municipal organizations have shifted completely away from print communications. And what we've seen in our parks surveys is that there has been a dip in satisfaction with the level of communication as soon as they go to a digital guide. So, our assumption is that people are more accustomed to or trained to know that printed communication is coming to them on a regular basis versus the deluge of junk emails. I think there is some sense; at least for the near future, that print is going to be very vital to making sure folks are informed. The receipt of something printed from your city seems to be more meaningful; although ETC has not studied this issue in depth.*

Q. Have your studies in other cities identified any other forms of printed communications that U City is not doing?

A. *The most fruitful one is from the City of Olathe. We've got a good home office client, and something they tested was print communications on code enforcement. Twice a year they send out postcard notifications to different neighborhoods where they have experienced a lot of calls about the same issues. What they found was a reduction in the number of calls because folks seemed to be self-enforcing these regulations. So, rather than a newsletter, they send out postcards in their utility bills.*

Q. We send our trash bill out to every household, so perhaps that would be an ideal place to try looking at some of our low-hanging fruit and increasing the frequency of our printed communications.

From where we were eight or nine budget years ago, I think there has been an extraordinary emphasis on properly funding street maintenance. And since we have a huge project coming up in the next twelve to twenty-four months on Pershing, do you have any suggestions on how we could effectively communicate the progress we've made, as well as our future projects?

A. I think U City has always been handicapped by large thoroughfares that are under the County's control. And even though we created a very long list of county-maintained roads in this survey, I have a strong suspicion that folks still can't separate them. So, there were certain aspects of your drive-through town that we couldn't separate when it came to rating this report. However, one suggestion would be road signs, i.e. "Completed as Promised," which can go a long way to highlight your accomplishments. ETC does a customer service survey for MoDOT in Kansas, and that's something they've started doing because it brings closure to that particular situation.

Another thing we've noticed in smaller communities is that when streets are repaired on one block there is more dissatisfaction expressed from the surrounding blocks whose streets have not been repaired. And I'm guessing that if your Public Works Department was here they would tell me that they've got a maintenance schedule. So truthfully, setting expectations versus simply saying we're working on it is going to be important through your communications. I wonder how many of your residents know that you're spending significantly more dollars on an issue than you ever have in the past? For the average resident hearing that type of messaging could be pretty impactful.

Councilmember Hales stated from his own experience, he thinks the challenge is finding the balance in their numbers because they are making progress, but it simply takes time to see it. He stated that he is very proud of what they've been able to do and appreciates these surveys which are incredibly valuable for the City, its administration, staff, and Council.

Mr. Murray stated on one hand there is some sense that this survey is important, but on the other hand, there is a sense that the City has hired subject-matter experts in key positions throughout the City. And he's sure the Public Works Director could give Council the true nature of where the City's streets are at in terms of a grading system; even though oftentimes that system is in conflict with the messages or calls many of you receive. Here, we're talking about how we can shift the perceptions of your performance versus how you can perform better. So, it's important to understand these two relationships and how they can sometimes be in contrast with each other.

Councilmember Fuller asked Mr. Murray how they controlled the random selection of the 600 surveys that were received? Mr. Murray stated with 600 completed surveys for a community this size, ETC will probably select about 2,000 households to be randomly sent a copy. And based on the address verification question on the survey they can manage who was and who was not included in that random sample.

What they know, is that as soon as people got the surveys in the mail or the URL, they saw a lot of hits. But if respondents don't put in an address or they put in an address that does not match the random sample, those surveys are put into a separate bucket. And oftentimes anything less than 100 responses are deemed to be unworthy of processing. Because if someone is that adamant about completing a survey that they were not selected to receive, typically they will contain some of the strongest opinions within a community; either pro or con. He stated ETC's job is to ensure that the statistical validity of the results is maintained, and that is done based on the address verification or the address-based sampling.

Councilmember Klein asked if the City's private neighborhoods that collect fees to maintain streets were factored into the survey? Mr. Murray stated he would tend to believe that they were because Question 6 is more of a drill down on maintenance, service, and repairs of the City's streets and sidewalks, and this was one of the areas that have continued to decrease.

This has created frequent misunderstandings among residents who live in gated communities across the country and believe that their HOA is going to do it. And in many cities residents are now being asked to maintain their sidewalks. So, there is a definite problem in terms of communication, and it's a tricky subject to navigate because of the vast differences between each community. Nevertheless, he would imagine that if an HOA has not been maintaining their streets and sidewalks, he's almost certain they are not going to tell those homeowners that they are the ones responsible for doing it.

Councilmember Klein stated it looked like one of the areas that were so dissatisfied was within one of the City's private neighborhoods.

Councilmember McMahon asked Mr. Murray if ETC could comprise a summary of the three surveys they've conducted to see what changes have occurred over the last six years; whether the additional funding kicked into the bucket for some of these things thought to be priorities has had an impact, and if that impact was based on funding, communications or perceptions? Mr. Murray stated he would have the research staff put together the satisfaction and dissatisfaction trends from the 2019, 2021, and 2023 surveys.

He stated the reason he did not spend a lot of time on trends is because the 2021 survey sticks out like a sore thumb. There were kind of artificially high ratings that year that ETC believed were based more on a national decline in perception rather than performance-related issues.

Mr. Rose stated he thinks it's important to note that while the results of the survey reflect that U City is doing really well, staff asked ETC to identify areas of improvement where the City could get the most bangs for its investments. And as Councilmember Klein pointed out, some responses were regarding things that the City has no control over. So, it was helpful to be able to identify those responses on the map.

Mayor Pro Tem Smotherson thanked Mr. Murray for his presentation and stated that he is looking forward to seeing some of the local results that Councilmember Clay talked about.

4. ADJOURNMENT

Mayor Pro Tem Smotherson thanked everyone for their attendance and adjourned the Study Session at 6:15 p.m.

LaRette Reese
City Clerk, MRCC

