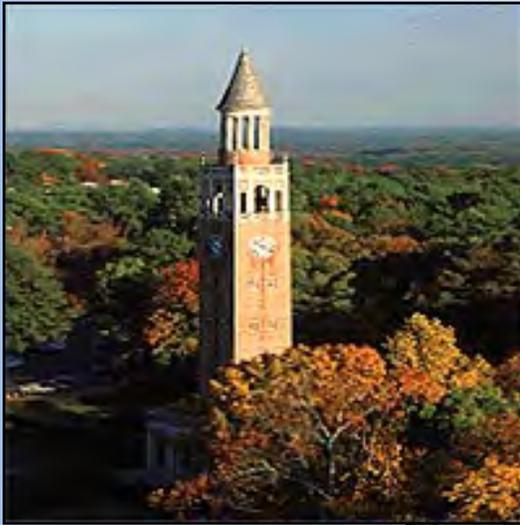


2011 DirectionFinder® Community Survey FINAL Results



ETC Institute
725 West Frontier Circle
Olathe, Kansas
66061

Prepared for
Town of Chapel Hill

February, 2012

Contents

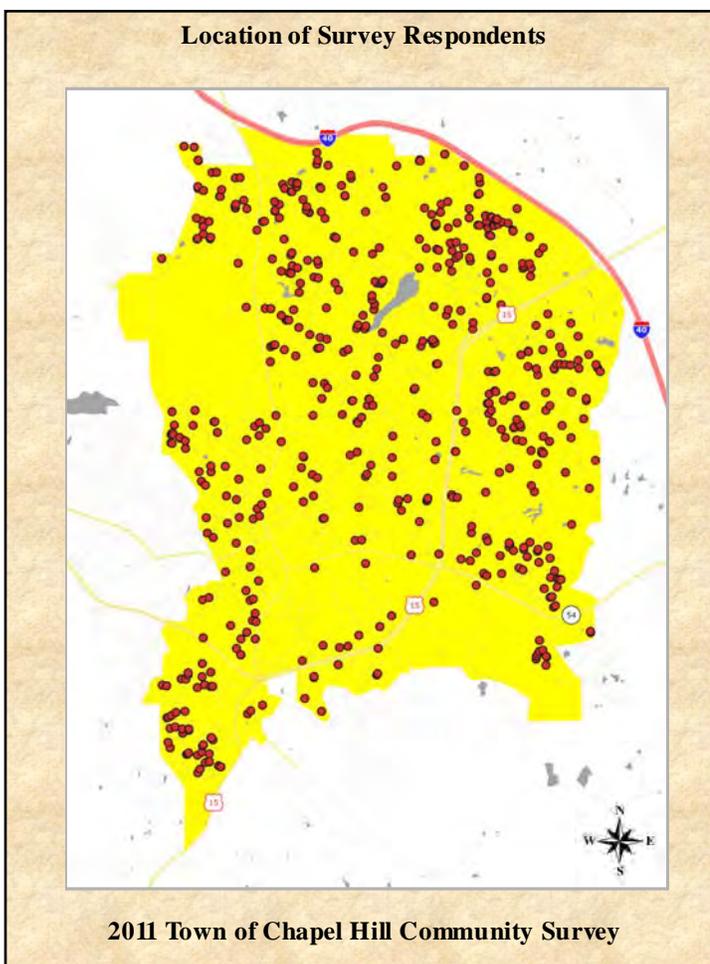
Executive Summary	i
Charts and Graphs	Section 1
Benchmarking Data	Section 2
Importance-Satisfaction Analysis	Section 3
GIS Maps	Section 4
Tabular Data and Survey Instrument	Section 5



Purpose and Methodology

ETC Institute administered the DirectionFinder® survey for the Town of Chapel Hill during November and December of 2011. This is the second time that the survey was administered for the Town. The first time was during the same time period in 2009, providing valuable TREND information for the Town. The surveys were administered as part of the Town’s effort to assess citizen satisfaction with the quality of services. The information gathered from the surveys will help the Town establish budget priorities and refine policy decisions.

Resident Survey. A seven-page survey was mailed to a random sample of 2,000 households in the Town of Chapel Hill. Approximately seven days after the surveys were mailed, residents who received the survey were contacted by phone. Those who indicated that they had not returned the survey were given the option of completing it by phone. Of the households that received a survey, 255 completed the survey by phone and 352 returned it by mail for a total of 607 completed surveys (31% response rate). The results for the random sample of 607 households have a 95% level of confidence with a precision of at least +/- 4%. There were no statistically significant differences in the results of the survey based on the method of administration (phone vs. mail). In order to better understand how well services are being delivered by the Town, ETC Institute geocoded the home address of respondents to the survey. The map to the right shows the physical distribution of survey respondents based on the location of their home.



The percentage of “don’t know” responses has been excluded from many of the graphs shown in this report to facilitate valid comparisons of the results from the Town of Chapel Hill with the results from other communities in the *DirectionFinder®* database. 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 provided in the tabular data section 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
- GIS maps that show the results of selected questions as maps of the Town
- benchmarking data that shows how the results for the Town of Chapel Hill compare to other cities
- importance-satisfaction analysis
- tables that show the results for each question on the survey
- a copy of the survey instrument.

Major Findings

- **Most of the residents surveyed were satisfied with Town services.** Eighty-five percent (85%) of the residents surveyed who had an opinion were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of the Town’s public safety services, 84% were satisfied with the overall quality of services provided, 82% were satisfied with the quality of the Town’s library services, and 81% were satisfied with the maintenance of Town parks and recreation programs. **TRENDS: Change that is referred to as “significant” is above or below the +/-4% margin of error. For the Town Services category, there were several areas that improved significantly. The most significant increases were with the maintenance of public housing, the value received for Town tax dollars and fees, and how well the Town is managing growth.**
- **Services that residents thought should receive the most increase in emphasis over the next two years.** The areas that residents thought should receive the most increase in emphasis from the Town of Chapel Hill over the next two years were: (1) overall flow of traffic and congestion, and (2) how well the Town is prepared for the future.
- **Perceptions of the Town.** Most (90%) of the residents surveyed *who had an opinion* indicated that they were satisfied with the quality of life in the Town of Chapel Hill, 88% were satisfied with the image of the Town, and 80% were satisfied with the overall feeling of safety in the Town. **TRENDS: The most significant increase in this category, was the acceptance of diverse populations.**
- **Public Safety.** This year, Fire and Emergency Management Services and Police Services were addressed in separate questions.
 - **Fire and Emergency Management Services** Ninety-three percent (93%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of local fire protection, and 90% were satisfied with how quickly fire units respond to emergencies.

- **Police Services** Eighty-four percent (84%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the overall quality of police protection, and 83% were satisfied with how quickly police respond to emergencies.

TRENDS: A significant increase for Fire and Emergency Management was with the overall quality of local fire protection. Significant increases for the Police Department were with the visibility of police in neighborhoods, and the Town’s effort to prevent crime.

- **Town Regulations.** Sixty-three percent (63%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with enforcing sign regulations, and 61% were satisfied with enforcing maintenance of business property. **TRENDS: There was a significant increase with enforcing of sign regulations.**
- **Parks and Recreation.** Eighty-four percent (84%) of the residents *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the maintenance of town parks, 73% were satisfied with the number of town parks, and 73% were satisfied with the landscaping and appearance of public areas along streets. **TRENDS: The most significant increases were realized in the number of walking and biking trails, public art and cultural arts programs, and therapeutic recreation programs.**
- **Library Services.** Ninety-one percent (91%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of assistance provided by the library staff, 86% were satisfied with the overall quality of library services, and 85% were satisfied with the access to library facilities and services. **TRENDS: The most significant increases were with the number of recorded books available and the quality of children’s programs.**
- **Town Maintenance/Public Works.** The areas of maintenance that were rated best by residents included: maintenance of street signs and pavement markings (74%), maintenance of streets in your neighborhood (73%), and the maintenance of main Town street thoroughfares (73%). Residents were generally least satisfied with the adequacy of street lighting. **TRENDS: The maintenance and preservation of downtown increased significantly from 2009.**
- **Town Communications.** More than half (65%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of the Town’s website, Chapel Hill eNews updates (64%), and with access to information on local issues and events (62%). **TRENDS: There was a significant increase in nearly every area of communication.**
- **Transportation.** Seventy-four percent (74%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of Chapel Hill Transit, 64% of those surveyed were satisfied with the availability of greenways, and 52% were

satisfied with the availability of sidewalks in the Town. **TRENDS: A significant increase was realized with the availability of greenways and walking trails.**

- The most congested East/West Road is US 15-501 South
 - The most congested North/South Road is Fordham Boulevard
 - Seventy percent (46%) of respondents have at least one member of their household who has used public transit in Chapel Hill
 - Fifty-one percent (51%) of those surveyed ride a bicycle
 - Sixty-four percent (64%) felt that riding a bicycle in Chapel Hill was safe.
- **Trash Service.** Ninety-three percent (90%) of the residents surveyed *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with residential trash collection service, 85% of those surveyed were satisfied with residential recycling service, and 80% were satisfied with yard waste removal.

Other Findings.

- 62% of the 51% that ride a bike in Chapel Hill chose separate bike paths as their most preferred bicycle amenity.
- 59% of residents surveyed indicated that they use recycling services located in Chapel Hill or Eubanks Road.
- 42% of residents indicated that a re-developed downtown was the most important of 12 possible capital improvement issues.
- 71% of residents felt a re-developed downtown was essential (39%) or important (32%) as a part of the Town's economic development strategy. Comparing the positives (71%) to the negatives (15%), the ratio is nearly 5 to 1.
- 62% of those surveyed were dissatisfied with the availability of parking in downtown Chapel Hill.
- 94% of the residents surveyed indicated that the quality of safety and security played an important role when deciding to live in the Town of Chapel Hill.