



COUNTYSTAT OFFICE

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To: County Executive Marc Elrich, CAO Andrew Kleine, Deputy CAO Fariba Kassiri, PIO Director Barry Hudson, Assistant CAOs, and Special Assistants

From: Dave Gottesman, CountyStat Manager

Re: Montgomery County 2019 Resident Survey – Executive Summary

Background – National Research Center, Inc. (NRC) administered the survey in two phases:

1. A random sample of 5,000 Montgomery County households were mailed the survey in late May and early June 2019. About 3% of the mailed surveys were undeliverable. Of the remaining 4,838 households that received the survey, 954 completed it, providing an overall response rate of 20% (slightly lower than the 22% completion rate in 2017). This is a strong response rate to a mailed survey in our smartphone-driven age.
2. The County also offered all residents the opportunity to take the survey, providing a supplemental non-random, non-scientific self-selected sample. This “opt-in” web-only survey was open from June 28 – July 19, 2019 and publicized through a variety of channels, yielding 3,211 responses – significantly fewer than the 12,698 opt-in responses received in 2017. This is generally not a concern as the random-sample survey results offer a more valid assessment of public opinion, while the opt-in survey results are supplemental data.

Deliverables:

NRC created a series of reports that can be reviewed internally and also made public on the County website (as has been past practice), including: “Trends over Time” (comparing 2019 responses to our prior three surveys in 2007, 2009 and 2019); a “Community Livability Report” that examines responses across eight high-level facets (Safety, Mobility, Economy, etc.); a high-level “Dashboard Summary of Findings”; Comparison reports breaking out responses by demographic subgroups (years of residence, household income, race, ethnicity, and age) and geographic subgroups (RSCs and Council Districts); the “Supplemental Online [opt-in] Survey Results”; and a set of Technical Appendices (complete response data, benchmark comparisons, detailed survey methods, and the survey materials used by NRC).

These reports will be sent to you under separate cover.

NOTES: *The summary information below*

1. Pertains ONLY to the scientific random-sample survey
2. Includes a margin of error for any reported percentage of +/- 3% for all respondents
3. Is only a sample of the data collected and presented in the various reports prepared by NRC

2019 Survey Results: The overall assessment looks very **positive** compared to our 2017 ratings. For 2019 there are 134 items for which direct comparisons are available and of those:

- 83 items were rated similarly (within +/- 4 percentage points)
 - Of these 83 items, 64 of them edged up in the positive direction
- 48 items showed an **increase** in ratings
- Only 3 items showed a **decrease** in ratings
 - Availability of affordable quality mental health care (57% to 53% rating positively)
 - Availability of affordable quality child care/preschool (49% to 44% rating positively)
 - Positive sentiments reacting to the statement “What impact, if any, do you think the economy will have on your family income in the next six months?” (32% to 27% rating positively)

Noteworthy high-level data points (all percentages listed exclude responses of “don’t know”):

Below is a selection of trends over time for a variety of questions of general importance and/or of likely interest to this administration; these represent *only a portion of the complete survey*. N/A means that the question was not asked, or was asked in a different way, in 2007 and 2009, making the responses not comparable.

	% Rating Positively (excellent/good)			
	2007	2009	2017	2019
The overall quality of life in Montgomery County	79%	82%	82%	85%
Overall image or reputation of Montgomery County	84%	83%	80%	84%
Montgomery County as a place to live	86%	88%	88%	90%
Your neighborhood as a place to live	82%	81%	82%	87%
Montgomery County as a place to raise children	81%	86%	84%	86%
Sense of Community	59%	62%	55%	60%
Recommend living in Montgomery County to someone who asks	N/A	89%	87%	88%
Montgomery County as a place to retire	41%	48%	42%	43%
Overall appearance of Montgomery County	74%	74%	79%	81%
Overall feeling of safety in Montgomery County	N/A	N/A	81%	84%
Overall ease of getting to the places you usually have to visit	N/A	N/A	60%	67%
Ease of travel by public transportation	60%	59%	45%	51%
Traffic flow on major streets	N/A	N/A	26%	32%
Cleanliness of Montgomery County	N/A	N/A	76%	78%
Availability of affordable quality housing	15%	23%	27%	25%
Overall economic health of Montgomery County	N/A	N/A	78%	78%
K-12 Education	81%	82%	82%	82%
Availability of affordable quality child care/preschool	21%	24%	49%	44%
Overall quality of services provided	77%	77%	81%	84%
Overall customer service by MCG employees	71%	76%	70%	77%
The value of services for the taxes paid	54%	50%	49%	57%
The overall direction that Montgomery County is taking	52%	53%	58%	57%
Overall confidence in Montgomery County government	N/A	N/A	57%	62%

- For responses that impact the work of *Turn the Curve Teams* (Indicators):
 - Resident satisfaction with Code Enforcement increased from 53% to 58%
 - Resident satisfaction with value of services for tax dollars increased from 49% to 57%
- The survey covers a wide range of specific MCG services, both in terms of satisfaction and participation, including but not limited to:
 - Public safety continues to rate very highly, including Police Services (84% positive), Fire Services (96% positive), and Ambulance/EMS Services (94% positive)
 - After seeing declines from 2009 to 2017, the percent of respondents reporting having used a County Recreation Center and the percent reporting having used a County Library both increased from 2017 to 2019 (59% to 62% for recreation centers, and 71% to 74% for libraries), although those increase still fell short of 2009 usage numbers (65% and 79%, respectively)

Following the standard survey questions that NRC uses for all customer jurisdictions, our instrument included a variety of “custom questions” added with CE/CAO input:

- Respondents were asked to indicate if the following have gotten better, worse, or stayed the same over the past two years:

	Much better	Somewhat better	Stayed about the same	Somewhat worse	Much worse
Affordable Housing	5%	9%	38%	28%	20%
Crime	6%	18%	53%	17%	6%
The environment	8%	24%	55%	11%	2%
The pace of growth	9%	25%	38%	18%	9%
Public schools (K-12)	12%	25%	42%	15%	5%
Social services for those in need	10%	23%	51%	12%	4%
Traffic	3%	9%	26%	34%	28%
Job growth	6%	25%	47%	17%	5%
Business growth	7%	32%	43%	12%	5%
Quality of life opportunities (recreation, libraries, arts and culture)	11%	34%	53%	2%	0%

- Satisfaction with taxes vs. services:

I am satisfied with the current level of taxes and services	43%
I am willing to pay more taxes to get more services	12%
I feel that I pay too much for the services I receive	33%
I am willing to accept service reductions if it means lower taxes	8%
My opinion is different from the ones listed here	4%

- The need for MCG assistance and issue/problem resolution:

	Yes	No
Have you needed the County Government to resolve an issue or problem in the past two years?	16%	84%

- The 16% who responded “Yes” were asked how easy or hard it was to:

	Very easy	Somewhat Easy	Somewhat hard	Very hard
Communicate the issue/problem	38%	37%	16%	9%
Resolve the issue/problem	17%	39%	23%	21%

- Executive leadership requested a specific set of questions relating to MCPD conduct and public perceptions:

How many times, if any, have you interacted with an MCPD employee within the last two years?	0 times	1-2 times	3-5 times	6-8 times	9 or more times
In-person	56%	36%	4%	1%	2%
On the phone	71%	23%	3%	1%	2%
Online	93%	6%	0%	0%	1%

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly Disagree
To what extent do you agree or disagree that the MCPD employee(s) you interacted with treated you fairly?	53%	33%	5%	10%

Please rate each of the following aspects of the MCPD employee(s) with whom you personally had contact:	Excellent	Good	Fair	Poor
Professionalism	45%	32%	19%	5%
Approachability	40%	34%	10%	17%
Responsiveness	41%	25%	20%	14%

- In addition to a set of questions asking respondents to rate a variety of aspects of MCPS (class size, teacher/student ration, student safety, etc.), executive leadership requested a specific question related to adjusting school boundaries:

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
To what extent do you agree or disagree that Montgomery Public Schools (MCPS) should consider adjusting school boundaries in order to increase student diversity and better utilize capacity in its schools?	33%	36%	13%	17%

Recommended Next steps:

1. Share the survey results with Department/Office Directors, County Council, etc.
2. Develop any pressing questions that the survey data can address for you (e.g. what parts of the County report lower satisfaction with _____?)
3. Issue a Press Release/publicize as appropriate and post the full NRC reports on County website; 2017 public post available here: <https://www.montgomerycountymd.gov/OPI/survey2017.html>
4. CountyStat is working on the interactive survey reporting tool, building on the dashboard created to report the 2017 survey results; 2017 dashboard available here: <https://stat.montgomerycountymd.gov/stories/s/n4pe-e99n> (Note: this tool will help to answer the questions developed in step #2)