

FY 2024-25 EARLY BUDGET FORECAST

COMMITTEE OF THE WHOLE

BUDGET AND PERFORMANCE MANAGEMENT DEPARTMENT
MARCH 2024



ORDER OF AGENDA

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CITY
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OVERVIEW

02

RESIDENT
SURVEY
DATA

03

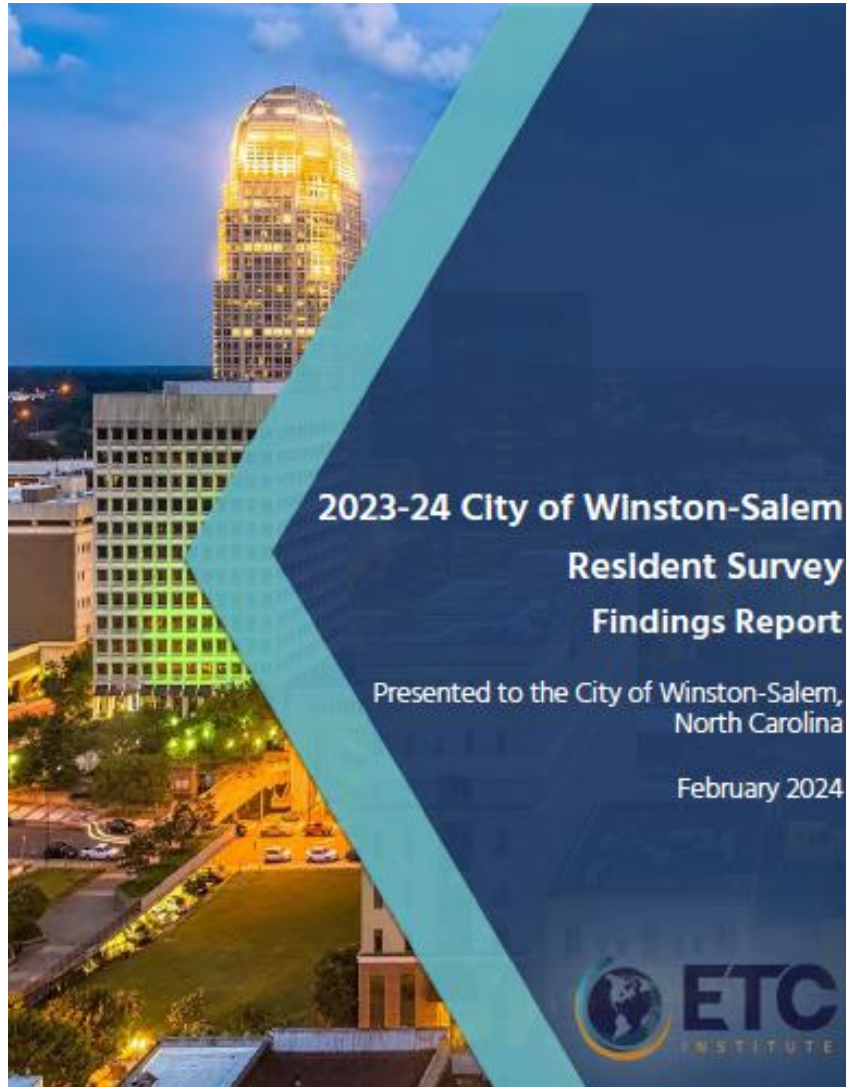
BUDGET
FORECAST

04

CAPITAL
PROJECTS
UPDATE

05

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METRICS
UPDATE



RESIDENT SURVEY DATA AND REPORT

WHY LOCAL GOVERNMENTS DO RESIDENT SURVEYS?

- **Allows for statistically significant generalizations to be made from representative sample**
- **Provides objective information on satisfaction with City services, overall importance of respective services, and overall perceptions of city livability**
- **Provides context for direction and planning for:**
 - Focused improvements to service delivery
 - Identifying clear priorities for strategic planning
 - Decisions related to resource allocation
- **Benchmarking performance regionally and nationally**

VENDOR SELECTION

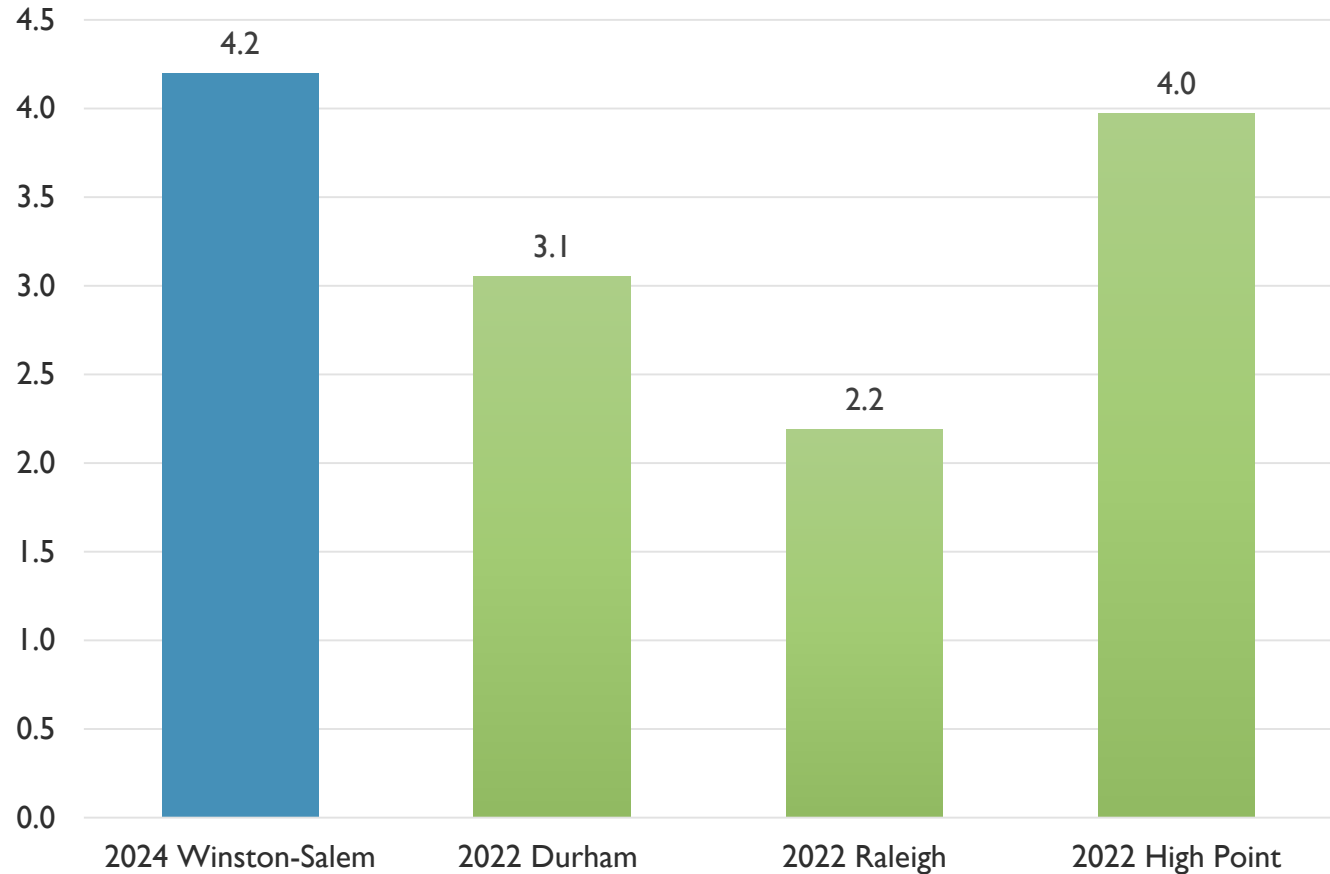
- **Final year of a three-year agreement with ETC to administer statistically significant satisfaction survey to city residents.**
- **ETC has a strong history of working with Cities to customize survey instruments.**
 - Provides national and regional benchmarks
 - Provides Importance-Satisfaction Analysis
 - Peer Jurisdictions that use ETC
 - Raleigh
 - Durham
 - High Point

**ETC has administered resident surveys for over 900 cities and counties since 1999.*

SURVEY REACH

- Minimum of 1,000 responses
- Minimum of 100/ward
- Make sure respondent demographics reflect overall city demographics
- Ability for everyone to take non-random version survey online

Responses per 1,000 Residents

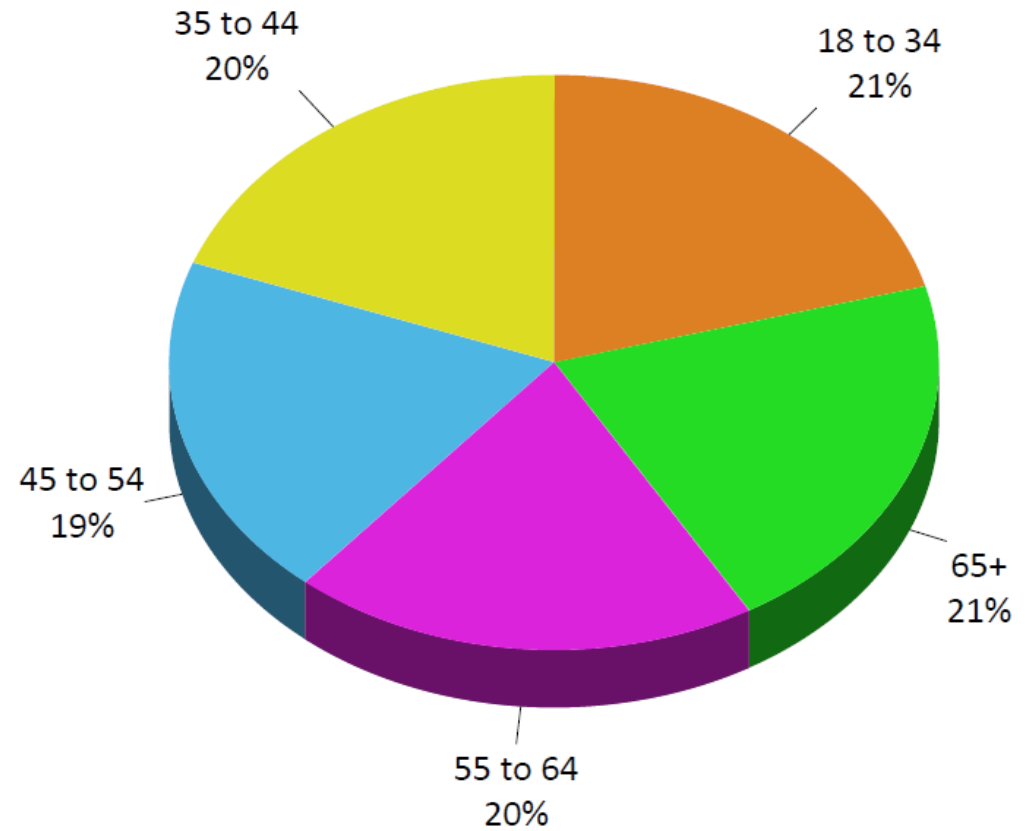


METHODOLOGY

- **Method of Administration**
 - By mail and online to randomly selected sample of households throughout the City
- **Sample size:**
 - Number of completed surveys: 1,059
 - A minimum of 100 surveys collected from each of the City's eight council wards
 - Demographics of survey respondents very reflective of City population
- **Confidence level: 95%**
- **Margin of error: +/- 3.0% overall**

RESPONDENT AGE BY PERCENTAGE

■ **Good Representation by Age**

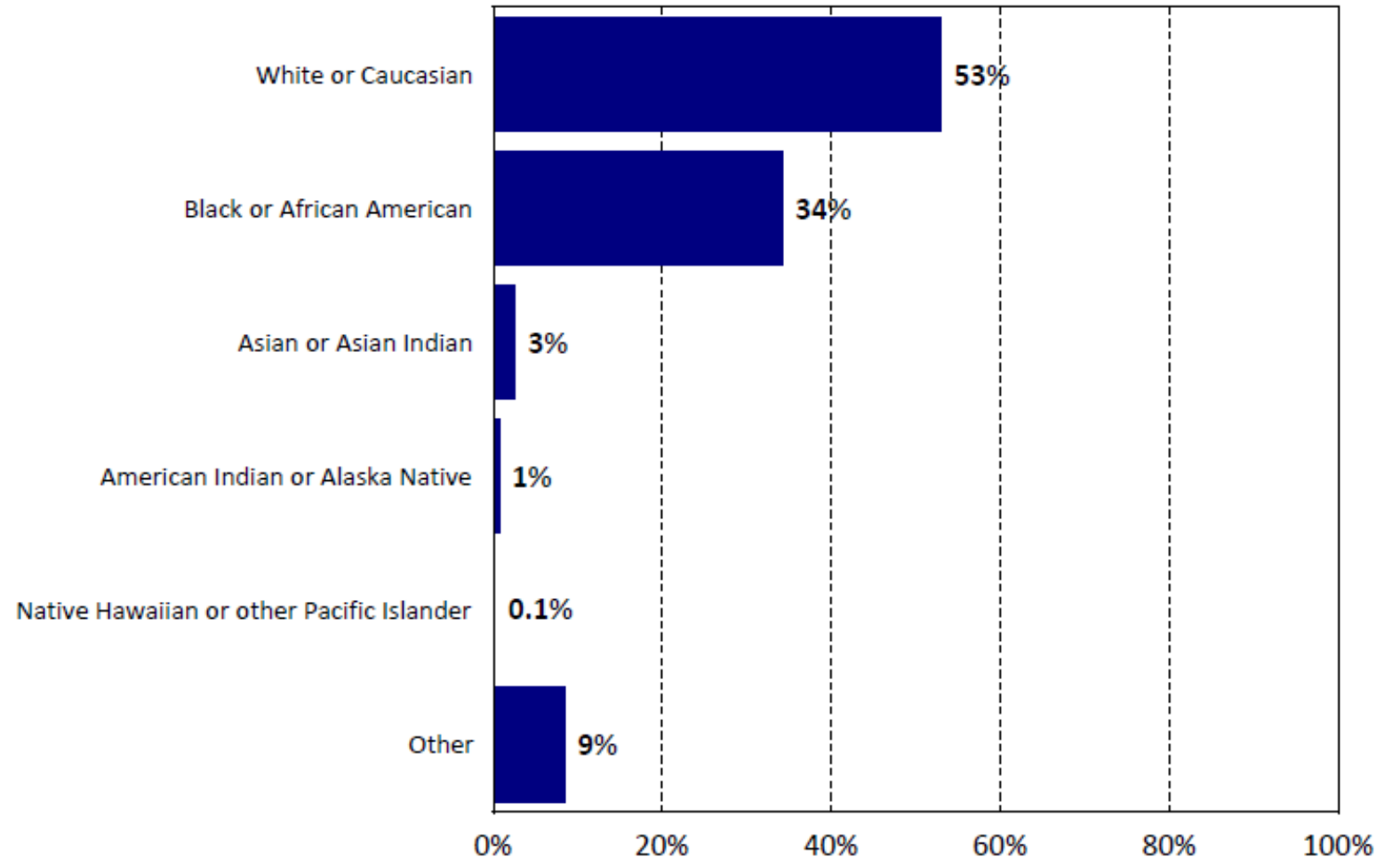


Source: ETC Institute (2024)

RESPONDENT RACE/ETHNICITY BY PERCENTAGE

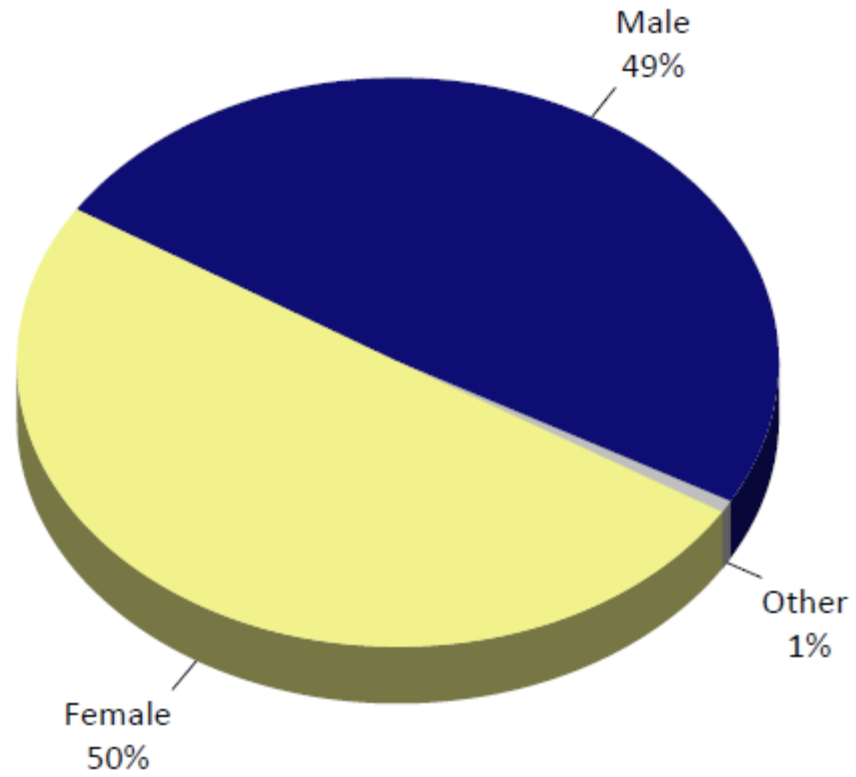
OVERALL RACE/ETHNICITY DEMOGRAPHICS FROM U.S. CENSUS BUREAU

- 51% White
- 33% Black or African American
- 3% Asian or Asian Indian
- 17% Hispanic or Latino
 - 16% of survey respondents identified as Hispanic or Latino

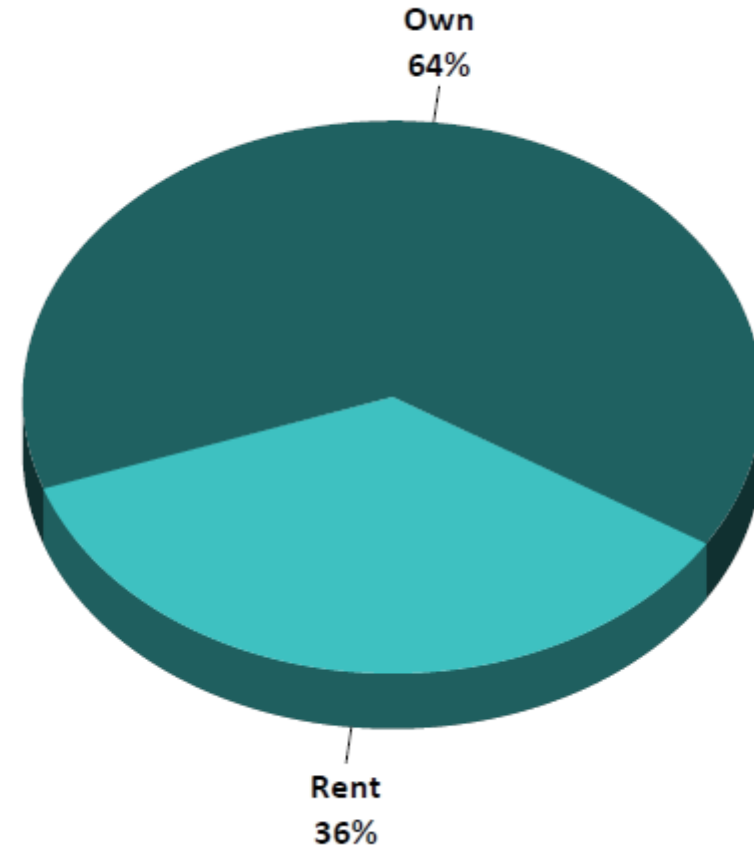


Source: ETC Institute (2024)

Gender Identity

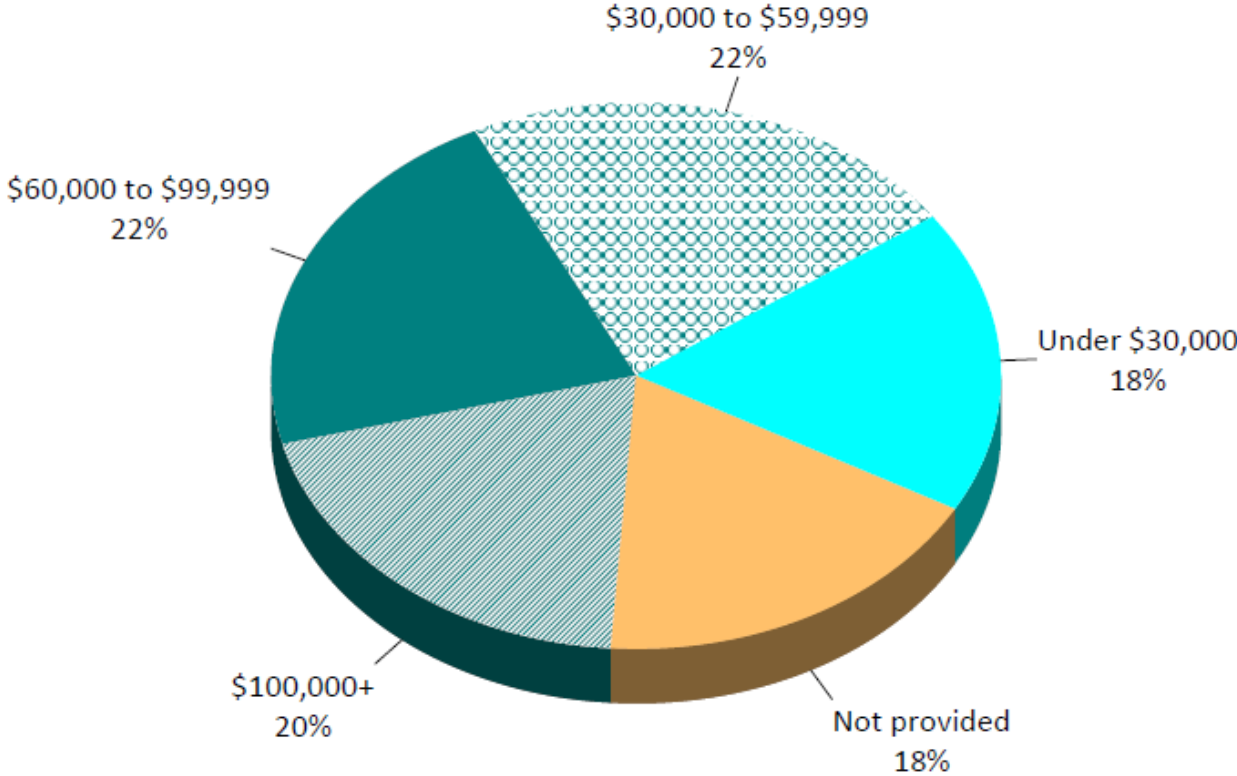


Rent versus Own



Source: ETC Institute (2024)

Average Household Income



Source: ETC Institute (2024)

BOTTOM LINE UP FRONT: SATISFACTION WITH CITY SERVICES IS MUCH HIGHER IN WINSTON-SALEM THAN OTHER COMMUNITIES



As a place to live, the City rated:

Benchmarks - 41% above the U.S.Average and **32%** above the Regional Average

Trend - City perception increased 5% from 2022 survey



Overall value received for City tax dollars / fees rated:

Benchmarks - 10% above the U.S.Average and **12%** above the Regional Average

Trend – Stable (No significant change from 2022 survey)



Quality of services provided by the City rated:

Benchmark - 13% above the U.S.Average and **10%** above the Regional Average

Trend - Stable (No significant change from 2022 survey)

AREAS OF FOCUS FOR THE NEXT TWO YEARS:

Street Maintenance

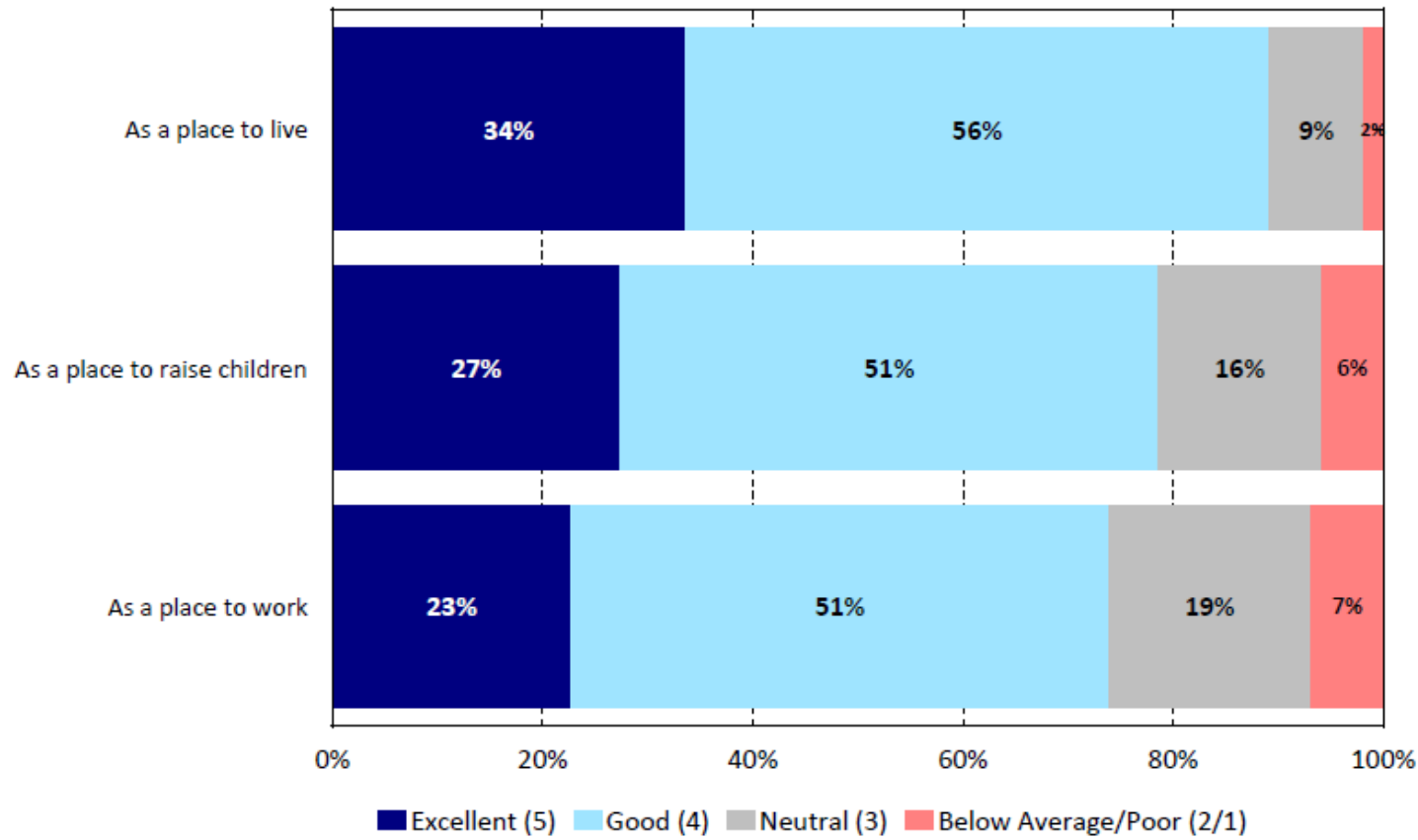
Crime Prevention

Neighborhood Services
(Aesthetics and Code Violations)

MAJOR FINDING #1

**Residents Continue to Have a Very
Positive Perception of the City**

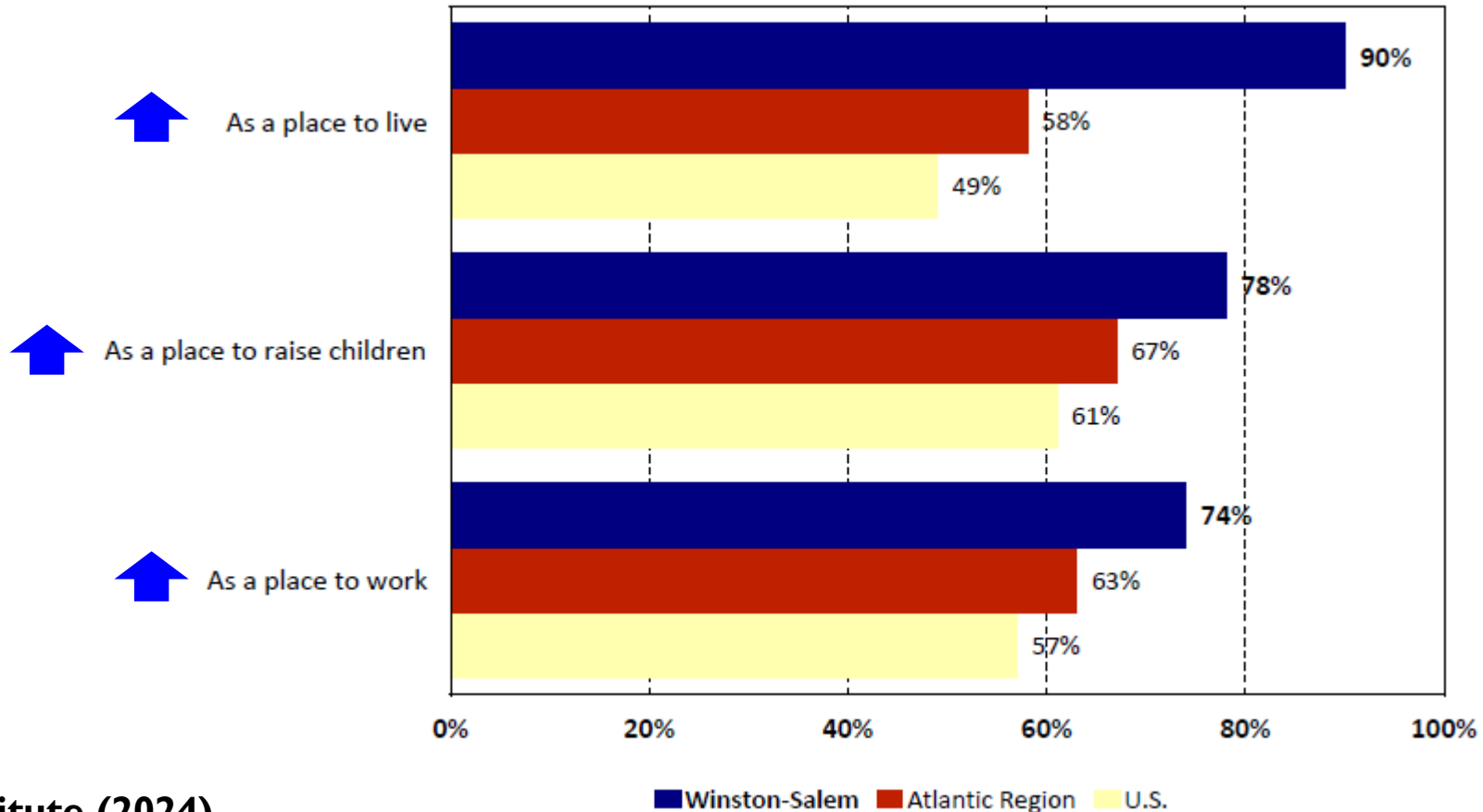
OVERALL RATINGS FOR THE CITY OF WINSTON-SALEM



Source: ETC Institute (2024)

Most Residents Feel that Winston-Salem Is an Excellent or Good Place to Live, Raise Children, and Work

BENCHMARK RATINGS FOR THE CITY OF WINSTON-SALEM



Source: ETC Institute (2024)

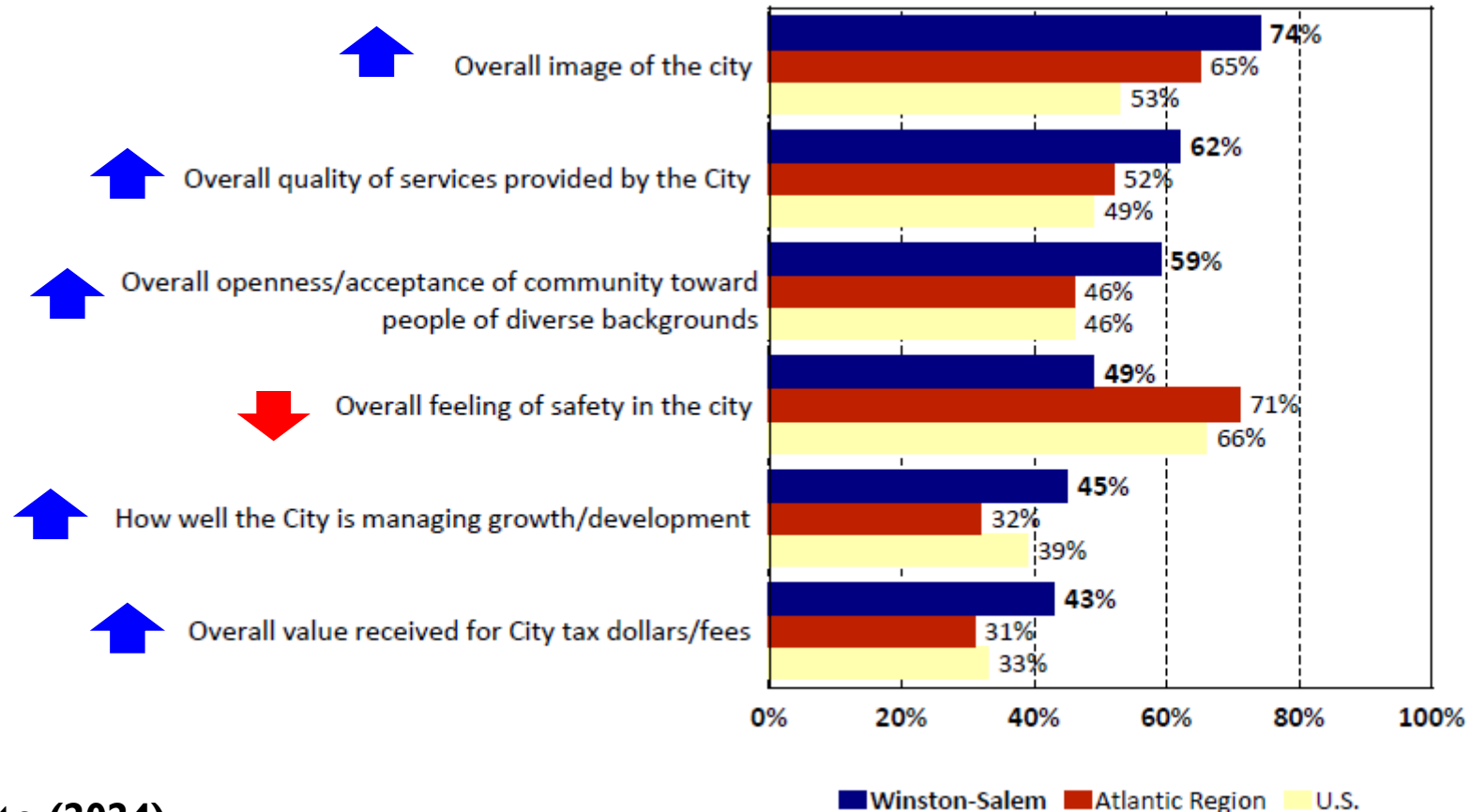


Significantly Higher:

Significantly Lower:



BENCHMARK RATINGS: SATISFACTION WITH ISSUES THAT INFLUENCE PERCEPTIONS OF THE COMMUNITY



Source: ETC Institute (2024)

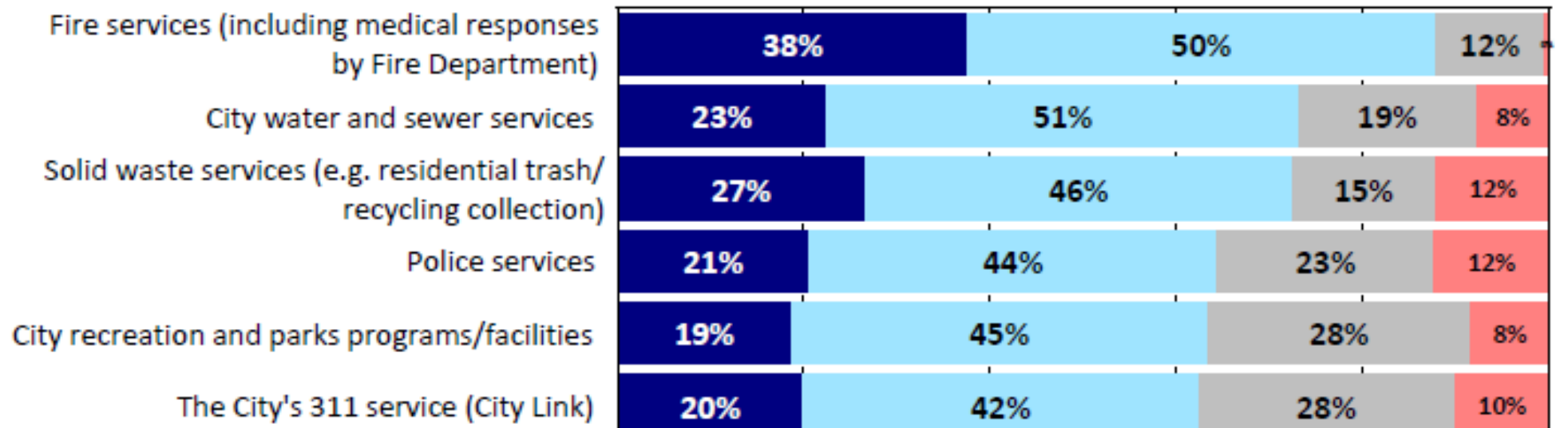


Significantly Higher:

Significantly Lower:

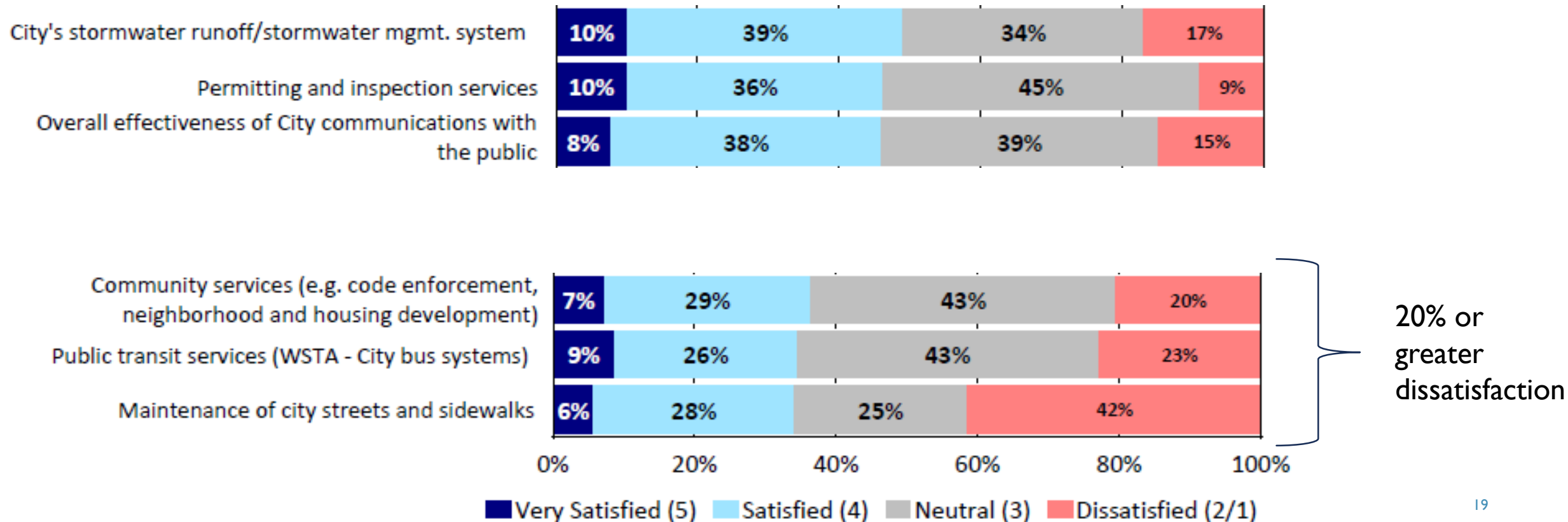


POSITIVE TRENDS: RESIDENT SATISFACTION > 60%



■ Very Satisfied (5) ■ Satisfied (4) ■ Neutral (3) ■ Dissatisfied (2/1)

LESS POSITIVE TRENDS: RESIDENT SATISFACTION < 50%

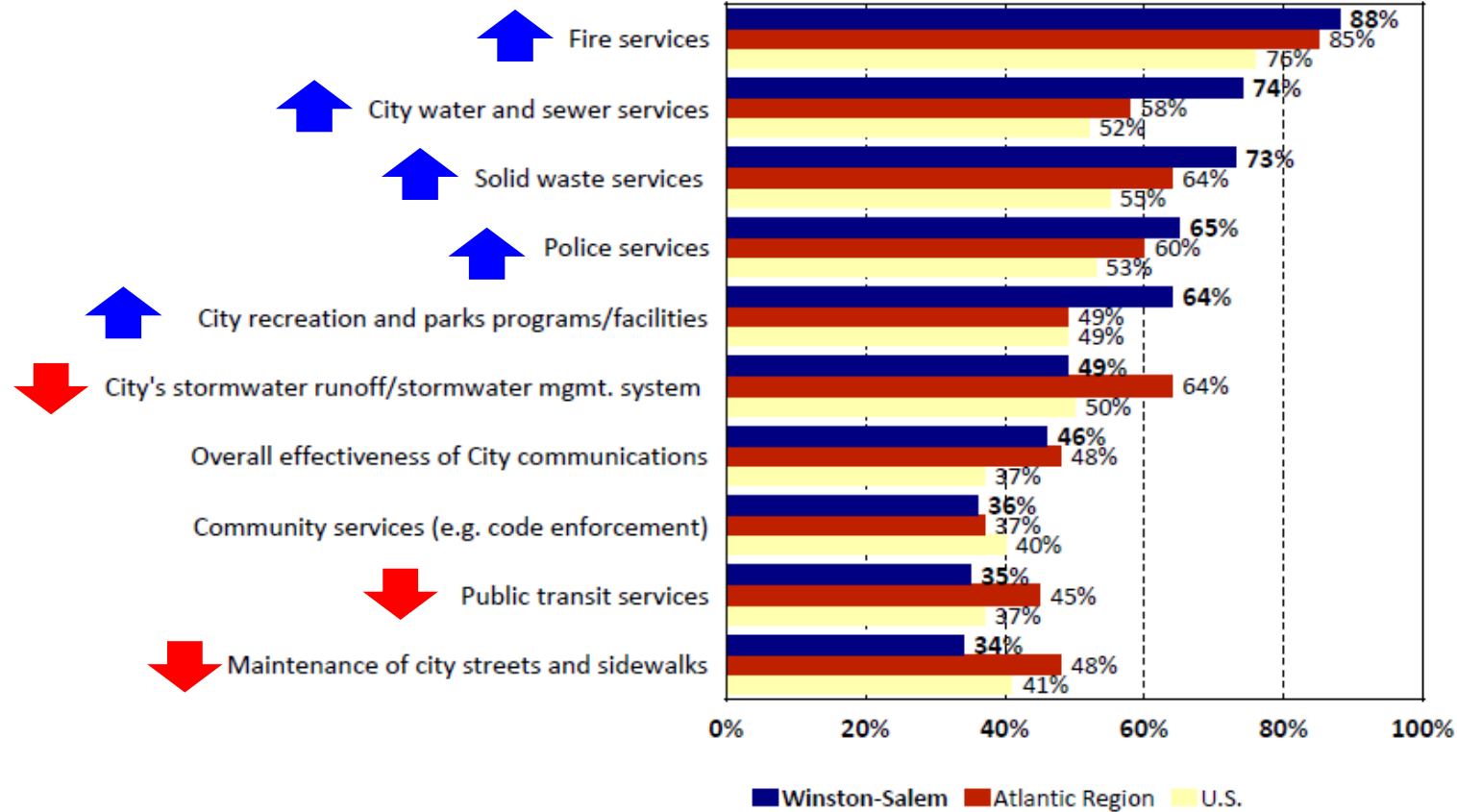


Source: ETC Institute (2024)

MAJOR FINDING #2

Satisfaction with City Services Ranks Higher in Several Areas for Winston-Salem than Other Communities

BENCHMARKS: SATISFACTION WITH MAJOR CATEGORIES OF SERVICE



Source: ETC Institute (2024)



Significantly Higher:

Significantly Lower:



MAJOR FINDING #3

Top Community Priorities

IMPORTANCE-SATISFACTION RATINGS BY DEPARTMENT

Police and Fire and Public Safety Communications Center

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS > .20)</u>						
The City's overall efforts to prevent crime	43%	1	38%	14	0.2691	1
<u>High Priority (IS = .10-.20)</u>						
Visibility of police in neighborhoods	32%	2	68%	4	0.1037	2



Public Transit

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS > .20)</u>						
Overall satisfaction with WSTA fixed route bus services	38%	2	20%	5	0.3064	1
Timeliness of WSTA fixed route bus services	41%	1	36%	1	0.2630	2
<u>High Priority (IS = .10-.20)</u>						
Overall satisfaction with WSTA Trans-AID bus services	25%	3	33%	3	0.1655	3
Timeliness of WSTA Trans-AID bus services	21%	4	31%	4	0.1435	4
Cleanliness of WSTA buses	17%	5	35%	2	0.1073	5

Streets and Transportation

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS > .20)</u>						
Maintenance of city streets throughout the City	52%	1	37%	12	0.3257	1
<u>High Priority (IS = .10-.20)</u>						
Availability of sidewalks throughout the city	24%	3	32%	17	0.1618	2
Maintenance of streets in your neighborhood	25%	2	44%	10	0.1383	3
The amount of traffic congestion on city streets	22%	4	38%	11	0.1333	4
Litter pick-up along city streets	19%	5	33%	16	0.1260	5
Ease/availability of on-street public parking downtown	15%	6	30%	18	0.1078	6

Community Development

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS > .20)</u>						
City housing rehabilitation programs	35%	2	23%	6	0.2703	1
Enforcing clean-up of trash/debris on private property	41%	1	34%	4	0.2693	2
Demolishing vacant structures	33%	3	22%	7	0.2535	3
<u>High Priority (IS = .10-.20)</u>						
Enforcing exterior maintenance of residential property	18%	6	31%	5	0.1214	4
Enforcing mowing/cutting of weeds on private property	19%	4	36%	3	0.1197	5

Recreation and Parks

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS = .10-.20)						
The City's youth programs and activities	23%	4	46%	10	0.1226	1
Walking and biking trails in the city	27%	2	62%	4	0.1007	2
Maintenance of city parks	39%	1	74%	1	0.1004	3

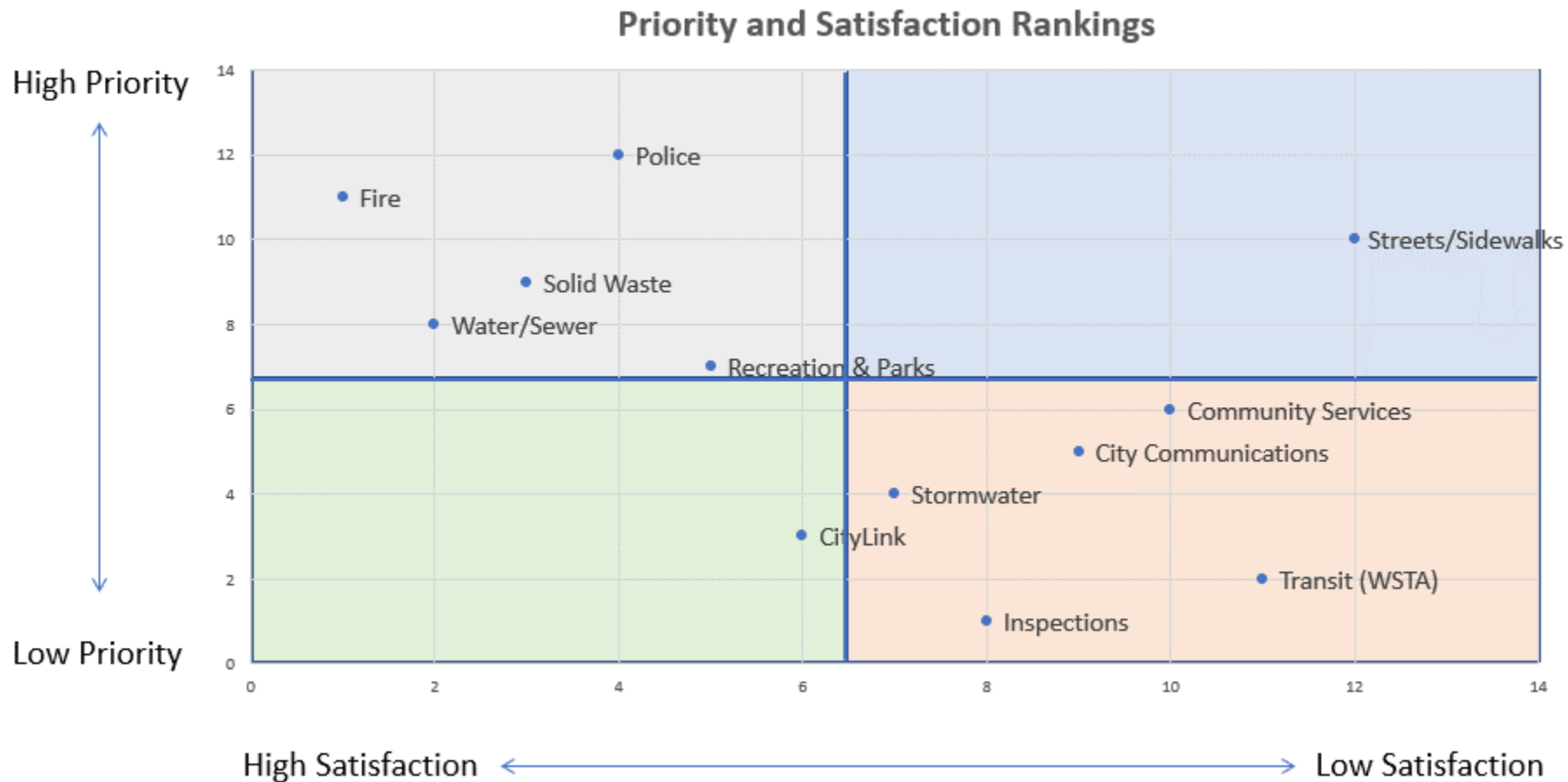
Solid Waste

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS > .20)						
Quality of leaf collection services	44%	1	40%	6	0.2616	1
Quality of brush pick-up services	36%	2	42%	4	0.2111	2

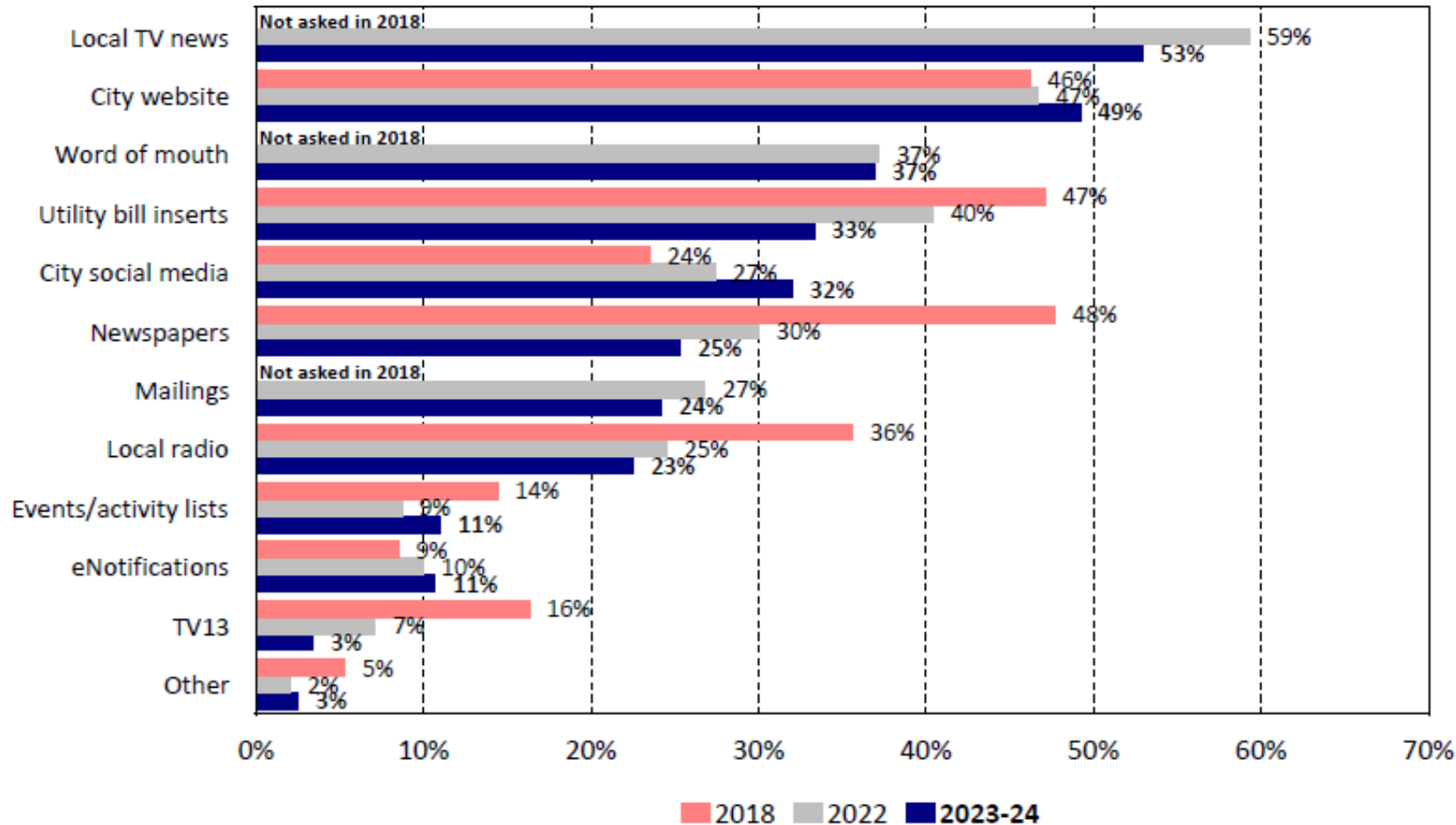
Water, Sewer, and Stormwater

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS > .20)						
Affordability of water/sewer & stormwater bills	51%	2	43%	5	0.2913	1
High Priority (IS= .10-.20)						
Overall quality of household drinking water	58%	1	72%	1	0.1624	2
Condition & cleanliness of catch basins in your neighborhood	23%	3	49%	3	0.1178	3
Overall management of public stormwater run-off	22%	4	48%	4	0.1123	4

PRIORITY AND SATISFACTION ACROSS DEPARTMENTS

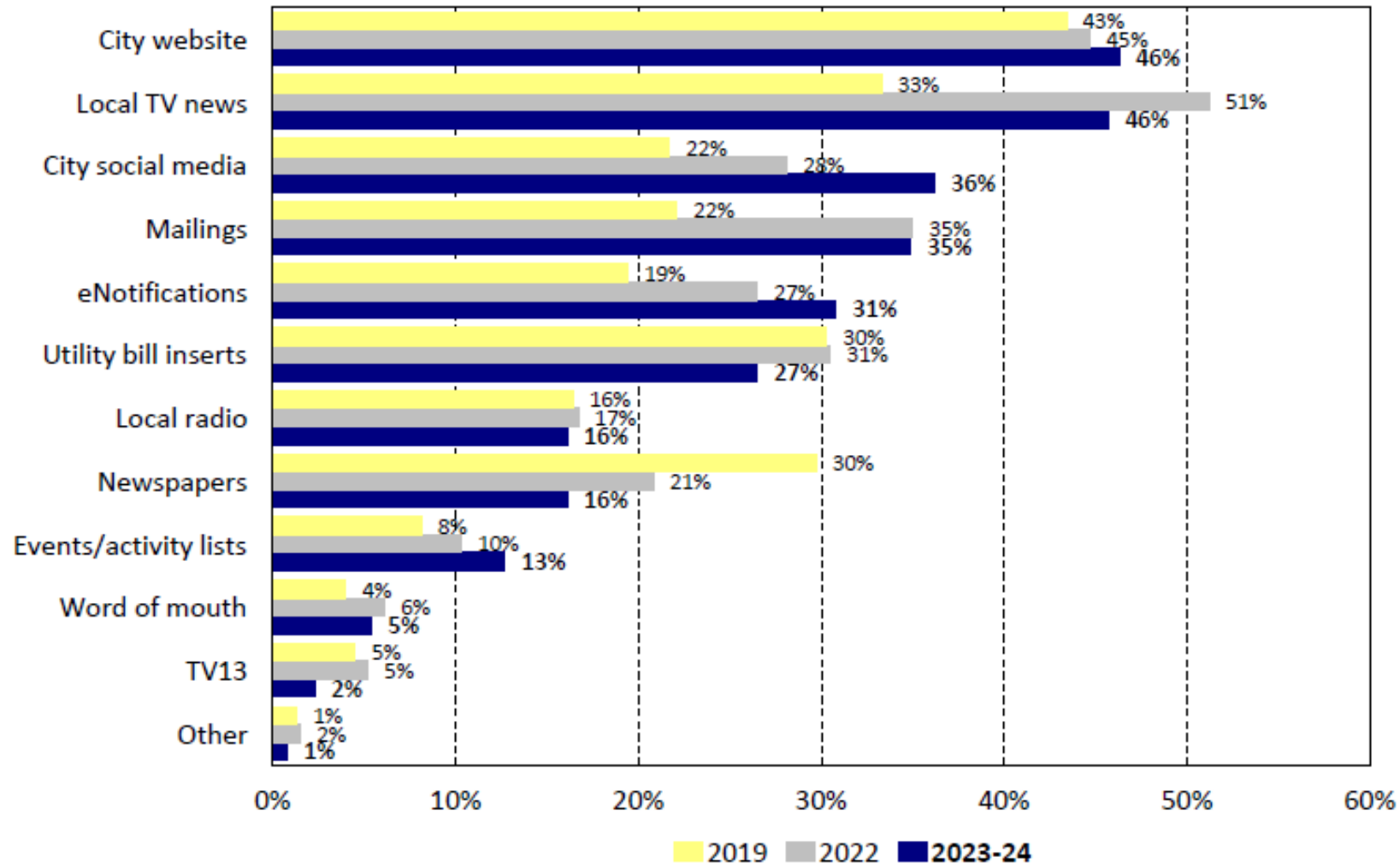


HOW RESIDENTS GET INFORMATION ABOUT PROGRAMS AND SERVICES OFFERED BY THE CITY



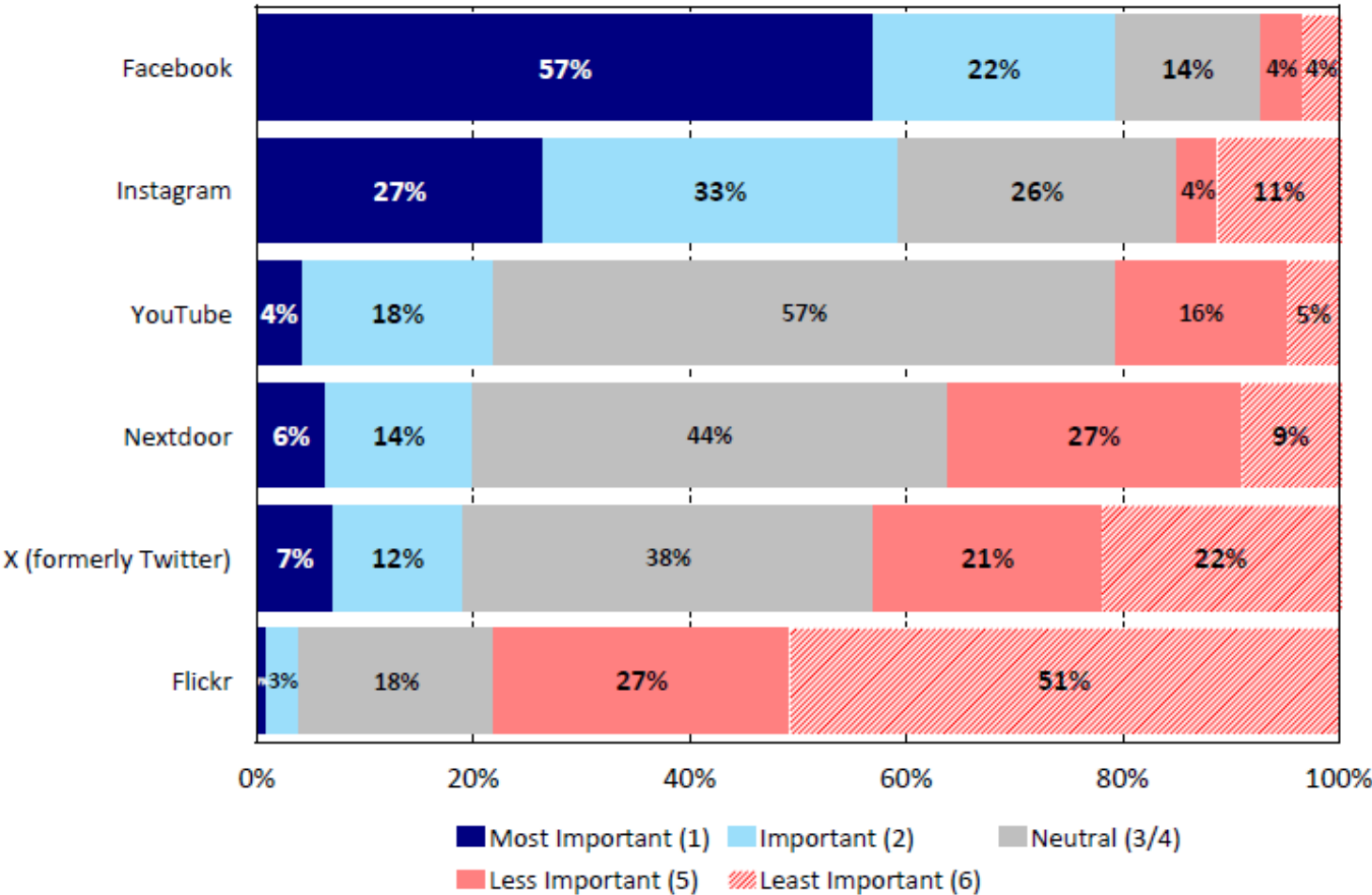
Though most of our residents obtain city information from Local TV news, our city website and social media continue to gain traction.

HOW RESIDENTS PREFER TO GET INFORMATION ABOUT PROGRAMS AND SERVICES OFFERED BY THE CITY



The city website is our #1 choice for information for city program and services.

SOCIAL MEDIA PLATFORM PRIORITIZATION



Facebook is respondents' preferred social media platform.

CONCLUSION

- Residents Have a Very Positive Perception of the City:
 - 90% rated the City as an excellent or good place to live; only 2% gave a rating of below average / poor
 - > 70% rated the City as an excellent or good place to work or to raise children.
- Satisfaction with City Services Ranks Higher in Several Areas Than Other Communities:
 - Winston-Salem rated at or above the U.S.Average in 30 of the 52 areas that were compared
- Top Priorities for the City:
 - Overall efforts to prevent crime and the visibility of Police in neighborhoods
 - Maintenance of city streets and availability of sidewalks throughout the City
 - Housing rehab programs, enforcing clean-up of trash on private property, and demolishing vacant structures / nuisance properties
 - City's youth programs, walking and biking trails in the City, and the maintenance of City parks