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Marin County Board of Supervisors
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SUBJECT: 2018 Marin County Resident Survey

Dear Board Members:

RECOMMENDATION: Accept report.

BACKGROUND

In the fall of 2018, Marin County worked with [National Research Center](#) (NRC) to conduct its first resident survey since 2009. The [National Citizen Survey](#) (NCS) is designed to capture a snapshot of a community's opinions and perspectives using industry-standard survey methods and best practices. The survey covers resident opinions across three "pillars" of every community (Community Characteristics, Governance, and Participation) and eight central "facets" of community (Safety, Mobility, Natural Environment, Built Environment, Economy, Recreation and Wellness, Education and Enrichment, and Community Engagement).

Assessing whether the Marin County Board of Supervisors' budget priorities are consistent with those of the community it serves was a central aim of the survey effort, as was benchmarking Marin's results among other counties and communities nationwide. Custom questions specific to Marin were added to gauge these priorities. Most survey questions were otherwise the same as those asked of all other communities to facilitate benchmarking.

NRC randomly sampled 3,200 residents with 695 responding for a 22 percent response rate and a 4 percent margin of error. The response rate was reportedly on the higher end for our population size. Responses were available via postage-paid envelope as well as online in English and Spanish. Of the 695 completed surveys, 54 were completed online; approximately 92% were written responses.

Marin also utilized an online "opt-in" survey for all other residents to participate, marketed with a "Your Voice Matters" campaign with outreach to local community-based organization partners including North Marin Community Services, Canal Alliance, Marin Community Clinic, Point Reyes Library, KWMR radio, and the Marin City Community Development Corporation. A County team worked to ensure under-represented communities had a voice. Staff distributed 500 English, 500 Spanish and 100 Vietnamese hard copy surveys among our community partners, leveraging their relationships with their clients and residents to help assure any who may have feared participating in the completely anonymous survey. Of the 3,068 opt-in surveys received, 34 were completed by mail and 3,034 were completed online. These results will be helpful to inform the random sample survey results.

The demographic characteristics of the survey respondents were compared to those found in the 2010 Census and American Community Survey estimates for adults in Marin County. The primary objective of weighting survey data is to make the survey respondents reflective of the larger population of the community. The characteristics used for weighting were housing tenure (rent or own), housing unit type (attached or detached), sex and age.

At a high level, most survey respondents have lived in Marin County more than 10 years, own their own home, make over \$100,000 annually per household, and are Caucasian. Some 14 percent classify themselves as Spanish, Hispanic, or Latino.

OVERVIEW OF RESULTS

Community Priorities

The Board of Supervisors FY 2018-20 Budget included five broad priorities over the next two years. Surveyed residents prioritized these as “essential” or “very important” in the following order:

- 91 percent - Investing in County infrastructure (roads, fire stations, libraries)
- 87 percent - Improving disaster preparedness
- 77 percent - Preserving affordable housing (workforce, senior or low-income)
- 76 percent - Addressing climate change
- 74 percent - Eliminating inequities in County policies and programs

Response to an open-ended question regarding the “single biggest priority Marin County Government should focus on in the next two years” were summarized into the following categories:

- 27 percent - Affordability/cost of living/housing
- 25 percent - Traffic/transportation/infrastructure improvements
- 22 percent - Environment/climate change/alternative energy/disaster preparedness

Key Findings

Broadly, most ratings for Marin County tended to be positive and were similar to ratings observed in comparison jurisdictions. Within the pillar of Community Characteristics, for example, scores within the facet of Safety tended to be higher than those in other communities and items within the Built Environment facet tended to be lower, where affordable quality housing was a concern. Within Governance, aspects of the Natural Environment facet were more positively viewed than in other communities across the nation.

- Key Finding 1: Marin residents enjoy a positive and healthy quality of life
- Key Finding 2: Marin’s economy is strong, but affordability is a challenge
- Key Finding 3: Marin’s natural environment is highly regarded
- Key Finding 4: While automobile traffic is a challenge in Marin, pedestrian and bicycle travel shine

National Benchmark Comparisons

The Resident Survey provided benchmark comparisons to similar communities nationwide, including over 500 cities, towns and counties. Some types of government services tend to consistently receive higher ratings than others across all

communities. For example, library services and public safety tend to get more positive ratings compared to code compliance or road conditions. Comparing the ratings to other similar communities through benchmark comparisons more accurately shows stand-out areas that Marin County is excelling in, or areas with room for improvement. Of 126 questions overall, relative to national benchmarks:

- 19 Marin responses received higher ratings
- 94 Marin responses received similar ratings
- 13 Marin responses received lower ratings

County Benchmark Comparisons

Overall, survey results were somewhat more favorable among incorporated areas, which is not unusual. Counties provide more mandated services on behalf of the state or federal government than do cities or towns – for example, social services, mental health or public health services. Approximately 40 percent of Marin County's budget is comprised of state and federal revenues, funding which is restricted for dedicated purposes. In addition, counties tend to provide services to more rural and less urbanized communities.

Relatively speaking, Marin compares more favorably to the more than 50 county-only benchmarks nationwide. Of 126 questions overall, relative to county-only benchmarks:

- 33 Marin responses received higher ratings
- 90 Marin responses received similar ratings
- 3 Marin responses received lower ratings

Conclusions

Overall, our residents enjoy a positive and healthy quality of life. Our economy is strong, but affordability is a challenge. Not surprisingly, our Natural Environment is highly regarded. While automobile traffic is a challenge, pedestrian and bicycle travel shine in comparison to others. Safety and Natural Environment were the highest rated facets in Marin, exceeding benchmarks. Marin was similar to other communities in most other areas. As might be expected in an attractive and affluent community, quality affordable housing, cost of living, and automobile congestion were the largest areas of overall concern – scoring generally lower than many benchmark communities.

We also have breakout data regarding various socio-economic filters, which we are studying. Generally speaking, wealthier Caucasians were most satisfied. Those 55 or older were the least positive regarding trust in their government. Housing affordability was more important for Hispanic or other races or ethnicities, and those earning less than \$100,000 experienced more housing-cost stress.

These survey results give us a starting point to compare ourselves to other local governments over time, and to help us understand what we're doing well and where we may need more focus. Follow-up efforts will include a "deeper dive" to understand resident priorities that require more focus and provide opportunities for improvements.

We invite the community to review the results. All information is posted on our website at www.marincounty.org/residentsurvey.

FISCAL IMPACT: Final costs were \$38,610 for the survey effort. Funds were included in the FY 2019-20 budget.

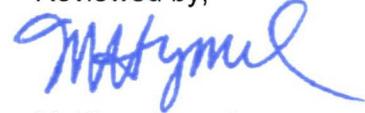
Please let me know if you have any questions or concerns.

Respectfully submitted,



Daniel Eilerman
Assistant County Administrator

Reviewed by,



Matthew Hymel
County Administrator

Attachments: NCS Dashboard Summary of Findings
NCS Community Livability Report
NCS Comparisons by Demographic Subgroups
NCS Comparisons by Incorporation Status
NCS Comparisons by Supervisorial Districts
NCS Open-ended Responses
NCS Technical Appendices
NCS Supplemental Opt-in Survey Results