City of Austin
2015 Community Survey Findings

Presented by
ETC Institute

February 2016
Agenda

• Purpose and Methodology
• Bottom Line Upfront
• Major Findings
• Conclusions
• Questions
Purpose

• To objectively assess resident satisfaction with the delivery of City services

• To measure trends from 2009 to 2015

• To gather input from residents to help set budget priorities

• To compare Austin’s performance with other large cities
Methodology

• Survey Description
  – included most of the questions that were asked on surveys administered between 2009 and 2014

• Method of Administration
  – by mail, phone and Internet to a randomly selected sample of households (in both English and Spanish)
  – sample included households with traditional land lines and cell phones
  – each survey took approximately 15 minutes to complete

• Sample size:
  – 2,060 completed surveys
  – a minimum of 200 surveys completed in each of the City’s 10 Council Districts

• Confidence level: 95%
• Margin of error: +/- 2.1% overall
Q24. Demographics: Total Annual Household Income

by percentage of respondents

- Under $20,000: 9%
- $20,000-$39,999: 13%
- $40,000-$59,999: 14%
- $60,000-$79,999: 15%
- $80,000-$149,999: 24%
- $150,000 or more: 16%
- Not provided: 10%

Source: ETC Institute DirectionFinder (2015 - Austin, TX)
Q23. Demographics: Are you Hispanic, Latino, or of other Spanish ancestry?

by percentage of respondents

- Not provided: 4%
- Yes: 35%
- No: 61%

Source: ETC Institute DirectionFinder (2015 - Austin, TX)

Good Representation By HISPANIC ANCESTRY
Q20. Demographics: Age of Respondents

by percentage of respondents

- 35-44 years: 21%
- 45-54 years: 21%
- 55-64 years: 20%
- 65+ years: 18%
- 18-34 years: 19%
- Not provided: 1%

Source: ETC Institute DirectionFinder (2015 - Austin, TX)

Good Representation By AGE
Q25. Demographics: Gender
by percentage of respondents

Female 52%
Male 48%

Good Representation By GENDER

Source: ETC Institute DirectionFinder (2015 - Austin, TX)
2015 City of Austin Community Survey

Location of Respondents

“Excellent” Representation By LOCATION
Residents generally have a positive perception of the City.

Satisfaction is the same in most areas of the City.

Austin is setting the standard for customer service among other large U.S. cities with a population of more than 250,000.

- Overall satisfaction with City services rated 11% above the large national average.
- Customer service rated 25% above the large national average.

Opportunities for Improvement that will have the most positive impact on overall satisfaction over the next year:

- Traffic Flow is clearly the top priority for residents!
- Other priorities include:
  - Planning, development review, permitting and inspection services
  - Public safety services
  - Maintenance of major city streets
  - Health and human services
Major Finding #1
Residents Generally Have a Positive Perception of the City
Most Residents Feel Good About Living in Austin, but There Are Concerns About Growth
With the Exception of Planning/Development Review/Permitting/Inspection Services and Street/Sidewalk Maintenance, no more than 15% of the Residents Surveyed Were Dissatisfied With Any of the Overall City Services Assessed.
Q18. Level of Agreement with the statement: “Employees of the City of Austin are ethical in the way they conduct City business” by percentage of respondents:

- Agree: 35%
- Strongly Agree: 13%
- Neutral: 22%
- Disagree: 6%
- Strongly Disagree: 5%
- Don't know: 19%

Only 11% of the Residents Surveyed Disagreed.
Major Finding #2
Overall Satisfaction with City Services Is Generally the Same Throughout the City
While There Are Some Differences for Specific Services, Overall Satisfaction With City Services Is the Same in Most Parts of the City.

**Q1h Satisfaction with the overall quality of services provided by the City**

**LEGEND**
Mean rating on a 5-point scale, where:
- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)
Major Finding #3
Satisfaction Levels in the City of Austin Are Higher than the National Average
<table>
<thead>
<tr>
<th>Benchmarking Communities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Arlington County, VA</td>
</tr>
<tr>
<td>• Arlington, TX</td>
</tr>
<tr>
<td>• Austin, TX</td>
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<tr>
<td>• Dallas, TX</td>
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<td>• Denver, CO</td>
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<tr>
<td>• Des Moines, IA</td>
</tr>
<tr>
<td>• Durham, NC</td>
</tr>
<tr>
<td>• Fort Lauderdale, FL</td>
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<tr>
<td>• Fort Worth, TX</td>
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<tr>
<td>• Houston, TX</td>
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<tr>
<td>• Indianapolis, IN</td>
</tr>
<tr>
<td>• Johnson County, KS</td>
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<tr>
<td>• Kansas City, MO</td>
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<tr>
<td>• Las Vegas, NV</td>
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<tr>
<td>• Mecklenburg County, NC</td>
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<tr>
<td>• Miami-Dade County, FL</td>
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<tr>
<td>• Minneapolis, MN</td>
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<tr>
<td>• Oklahoma City, OK</td>
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<tr>
<td>• Plano, TX</td>
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<tr>
<td>• Providence, RI</td>
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<tr>
<td>• San Antonio, TX</td>
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<tr>
<td>• San Diego, CA</td>
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<tr>
<td>• San Francisco, CA</td>
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<td>• Seattle, WA</td>
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<tr>
<td>• St. Louis, MO</td>
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<tr>
<td>• Tempe, AZ</td>
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<tr>
<td>• Tulsa, OK</td>
</tr>
<tr>
<td>• Tucson, AZ</td>
</tr>
<tr>
<td>• Wichita, KS</td>
</tr>
<tr>
<td>• Yuma County, AZ</td>
</tr>
</tbody>
</table>
Perceptions of the City
Austin vs. Large U.S. Cities
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons

- The City as a place to live
  - National avg: 75%
  - Austin: 82%
- The City as a place to work
  - National avg: 72%
  - Austin: 79%
- The City as a place to raise children
  - National avg: 68%
  - Austin: 75%
- Overall quality of life in the city
  - National avg: 70%
  - Austin: 74%
- Overall quality of services provided by the City
  - National avg: 49%
  - Austin: 60%
- The City's efforts to support diversity
  - National avg: 51%
  - Austin: 58%
- The City as a place to retire
  - National avg: 51%
  - Austin: 49%
- Overall value that you receive for your city taxes
  - National avg: 35%
  - Austin: 41%
- How well the City is planning growth
  - National avg: 23%
  - Austin: 39%

Significantly Higher:  
Significantly Lower:
Satisfaction with Major Categories of City Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons

- Overall quality of drinking water: 78% in Austin, 78% nationally
- Overall quality of parks/recreation: 67% in Austin, 74% nationally
- Overall quality of city libraries: 73% in Austin, 76% nationally
- Overall quality of public safety services: 75% in Austin, 76% nationally
- Overall quality of wastewater services: 67% in Austin, 72% nationally
- Overall quality of customer service: 41% in Austin, 66% nationally (25% above national average)
- Overall management of stormwater runoff: 52% in Austin, 49% nationally
- Overall quality of municipal court services: 50% in Austin, 51% nationally
- Overall effectiveness of communication by the City: 41% in Austin, 47% nationally
- Overall maintenance of city streets and sidewalks: 40% in Austin, 39% nationally

Significantly Higher: [Arrow] Significantly Lower: [Arrow]
Satisfaction with Public Safety Services
Austin vs. Large U.S. Cities
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons

- Overall quality of fire services: 88% vs. 87%
- Timeliness of Fire response to emergencies: 90% vs. 85%
- Medical assistance provided by EMS: 82% vs. 84%
- Speed of emergency police response: 63% vs. 68%
- Overall quality of police services: 67% vs. 73%
- Enforcement of local traffic laws: 54% vs. 53%

National avg for cities with pop. >250,000
Blue bar represents Austin

Significantly Higher: 
Significantly Lower: 

Feeling of Safety in the City
Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale
where 5 was "strongly agree"

National Comparisons

I feel safe in my neighborhood during the day
- 87% national average
- 91% in Austin

I feel safe in my neighborhood at night
- 50% national average
- 75% in Austin (25% above national average)

I feel safe in city parks
- 47% national average
- 65% in Austin (18% above national average)
Satisfaction with Neighborhood Services
Austin vs. Large U.S. Cities
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons

- Quality of residential curbside recycling services: 11% above national average
- Quality of residential garbage collection: 10% above national average
- Quality of residential yard waste collection
- Bulky item pick-up/removal services: 10% above national average
- Cleanliness of city streets and public areas
- Household hazardous waste disposal service

Significantly Higher: ➡️
Significantly Lower: ➡️
Significantly Higher: Significantly Lower:
Satisfaction with Parks and Recreation Services
Austin vs. Large U.S. Cities
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale
where 5 was "very satisfied"

National Comparisons

- Number of city parks: 71% national average, 73% Austin
- Appearance of park grounds: 64% national average, 71% Austin
- Number of walking/biking trails: 58% national average, 70% Austin (12% above national average)
- Quality of outdoor athletic fields: 59% national average, 57% Austin
- Quality of park facilities: 63% national average, 55% Austin
- Overall satisfaction with city swimming pools: 54% national average, 55% Austin
- Quality of youth athletic programs offered by City: 60% national average, 50% Austin (10% below national average)
- Quality of adult athletic programs offered by City: 47% national average, 47% Austin

Significantly Higher: ↑
Significantly Lower: ↓
Major Finding #4
Satisfaction with City Services Stayed About the Same From 2009 to 2015
The Most Significant Change from 2009 to 2015 Involved How Well Austin is Planning Growth
The Most Significant Changes in Major Services from 2009 to 2015 Included Management of Stormwater Runoff and Maintenance of City Streets and Sidewalks
There Were NO Significant Changes from 2009 to 2015, But Residents Generally Feel Safer in Neighborhoods and Parks.
Major Finding #5

Opportunities for Improvement
**Importance-Satisfaction Rating**

**Austin, TX**

**Maintenance and Appearance**

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Very High Priority (IS &gt;.20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Traffic flow on major city streets</td>
<td>63%</td>
<td>1</td>
<td>17%</td>
<td>8</td>
<td>0.5216</td>
<td>1</td>
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<tr>
<td>Condition of major city streets</td>
<td>58%</td>
<td>2</td>
<td>47%</td>
<td>3</td>
<td>0.3078</td>
<td>2</td>
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<tr>
<td><strong>High Priority (IS .10-.20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timing of traffic signals on city streets</td>
<td>32%</td>
<td>3</td>
<td>41%</td>
<td>5</td>
<td>0.1928</td>
<td>3</td>
</tr>
<tr>
<td>Pedestrian accessibility</td>
<td>24%</td>
<td>5</td>
<td>41%</td>
<td>4</td>
<td>0.1428</td>
<td>4</td>
</tr>
<tr>
<td>Enforcement of local codes and ordinances</td>
<td>21%</td>
<td>6</td>
<td>35%</td>
<td>7</td>
<td>0.1346</td>
<td>5</td>
</tr>
<tr>
<td>Condition of streets in your neighborhood</td>
<td>29%</td>
<td>4</td>
<td>58%</td>
<td>1</td>
<td>0.1213</td>
<td>6</td>
</tr>
<tr>
<td><strong>Medium Priority (IS &lt;.10)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bicycle accessibility</td>
<td>17%</td>
<td>8</td>
<td>40%</td>
<td>6</td>
<td>0.0998</td>
<td>7</td>
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<tr>
<td>Condition of sidewalks in your neighborhood</td>
<td>18%</td>
<td>7</td>
<td>49%</td>
<td>2</td>
<td>0.0899</td>
<td>8</td>
</tr>
</tbody>
</table>

**TRAFFIC FLOW IS THE TOP PRIORITY FOR RESIDENTS**
**2nd Tier Priorities:**

STEET MAINTENANCE, PLANNING, PUBLIC SAFETY, AND HEALTH/HUMAN SERVICES ARE NEXT TIER OF PRIORITIES
## Importance-Satisfaction Rating

**Austin, TX**

### Public Safety Services

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satsisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High Priority (IS .10-.20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall quality of police services</td>
<td>44%</td>
<td>1</td>
<td>72%</td>
<td>5</td>
<td>0.1224</td>
<td>1</td>
</tr>
<tr>
<td>Speed of emergency police response</td>
<td>33%</td>
<td>2</td>
<td>67%</td>
<td>6</td>
<td>0.1086</td>
<td>2</td>
</tr>
<tr>
<td><strong>Medium Priority (IS &lt; .10)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enforcement of local traffic laws</td>
<td>10%</td>
<td>7</td>
<td>52%</td>
<td>7</td>
<td>0.0483</td>
<td>3</td>
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<tr>
<td>Timeliness of EMS response to emergency location</td>
<td>22%</td>
<td>5</td>
<td>84%</td>
<td>4</td>
<td>0.0357</td>
<td>4</td>
</tr>
<tr>
<td>Timeliness of Fire response to emergency location</td>
<td>23%</td>
<td>3</td>
<td>84%</td>
<td>3</td>
<td>0.0354</td>
<td>5</td>
</tr>
<tr>
<td>Overall quality of fire services</td>
<td>23%</td>
<td>4</td>
<td>86%</td>
<td>1</td>
<td>0.0312</td>
<td>6</td>
</tr>
<tr>
<td>Medical assistance provided by EMS</td>
<td>18%</td>
<td>6</td>
<td>85%</td>
<td>2</td>
<td>0.0282</td>
<td>7</td>
</tr>
</tbody>
</table>

**Public Safety Priorities:**

- Overall quality of police services
- Speed of emergency police response
- Enforcement of local traffic laws
- Timeliness of EMS response to emergency location
- Timeliness of Fire response to emergency location
- Overall quality of fire services
- Medical assistance provided by EMS
## Importance-Satisfaction Rating

**Austin, TX**  
**Environmental Services**

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High Priority (IS 10-20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flood control efforts</td>
<td>34%</td>
<td>2</td>
<td>48%</td>
<td>5</td>
<td>0.1771</td>
<td>1</td>
</tr>
<tr>
<td>Water Conservation programs within Austin</td>
<td>40%</td>
<td>1</td>
<td>59%</td>
<td>1</td>
<td>0.1652</td>
<td>2</td>
</tr>
<tr>
<td>The water quality of lakes and streams</td>
<td>33%</td>
<td>3</td>
<td>57%</td>
<td>4</td>
<td>0.1418</td>
<td>3</td>
</tr>
<tr>
<td>Water/wastewater utility emergency response time</td>
<td>31%</td>
<td>4</td>
<td>57%</td>
<td>3</td>
<td>0.1329</td>
<td>4</td>
</tr>
<tr>
<td>Energy Conservation program</td>
<td>30%</td>
<td>5</td>
<td>58%</td>
<td>2</td>
<td>0.1262</td>
<td>5</td>
</tr>
</tbody>
</table>
## Importance-Satisfaction Rating

**Austin, TX**

### Recreational and Cultural Services

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important</th>
<th>Most Important Rank</th>
<th>Satisfaction</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High Priority (IS .10-.20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safety in City parks and park facilities</td>
<td>41%</td>
<td>1</td>
<td>58%</td>
<td>9</td>
<td>0.1728</td>
<td>1</td>
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<tr>
<td><strong>Medium Priority (IS &lt;.10)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of youth athletic programs</td>
<td>17%</td>
<td>7</td>
<td>50%</td>
<td>13</td>
<td>0.0857</td>
<td>2</td>
</tr>
<tr>
<td>Quality of parks and recreation programs</td>
<td>28%</td>
<td>2</td>
<td>70%</td>
<td>5</td>
<td>0.0831</td>
<td>3</td>
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<tr>
<td>Quality of facilities (picnic shelters, etc.)</td>
<td>17%</td>
<td>8</td>
<td>55%</td>
<td>12</td>
<td>0.0755</td>
<td>4</td>
</tr>
<tr>
<td>Number of walking/biking trails</td>
<td>22%</td>
<td>4</td>
<td>69%</td>
<td>7</td>
<td>0.0674</td>
<td>5</td>
</tr>
<tr>
<td>Number of City parks</td>
<td>24%</td>
<td>3</td>
<td>73%</td>
<td>2</td>
<td>0.0661</td>
<td>6</td>
</tr>
<tr>
<td>Satisfaction with City swimming pools</td>
<td>14%</td>
<td>10</td>
<td>55%</td>
<td>11</td>
<td>0.0635</td>
<td>7</td>
</tr>
<tr>
<td>Appearance of park grounds in Austin</td>
<td>19%</td>
<td>5</td>
<td>71%</td>
<td>4</td>
<td>0.0542</td>
<td>8</td>
</tr>
<tr>
<td>Materials at libraries</td>
<td>17%</td>
<td>6</td>
<td>70%</td>
<td>6</td>
<td>0.0517</td>
<td>9</td>
</tr>
<tr>
<td>Library programs</td>
<td>16%</td>
<td>9</td>
<td>72%</td>
<td>3</td>
<td>0.0460</td>
<td>10</td>
</tr>
<tr>
<td>Library hours</td>
<td>9%</td>
<td>11</td>
<td>62%</td>
<td>8</td>
<td>0.0357</td>
<td>11</td>
</tr>
<tr>
<td>Quality of adult athletic programs</td>
<td>6%</td>
<td>12</td>
<td>46%</td>
<td>15</td>
<td>0.0329</td>
<td>12</td>
</tr>
<tr>
<td>Quality of outdoor athletic fields</td>
<td>5%</td>
<td>14</td>
<td>57%</td>
<td>10</td>
<td>0.0195</td>
<td>13</td>
</tr>
<tr>
<td>Satisfaction with aquatic programs</td>
<td>3%</td>
<td>15</td>
<td>49%</td>
<td>14</td>
<td>0.0138</td>
<td>14</td>
</tr>
<tr>
<td>Cleanliness of library facilities</td>
<td>5%</td>
<td>13</td>
<td>77%</td>
<td>1</td>
<td>0.0103</td>
<td>16</td>
</tr>
</tbody>
</table>

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**Recreation and Cultural Services Priorities:**
## Importance-Satisfaction Rating

### Austin, TX

### Residential and Neighborhood Services

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High Priority (IS .10-.20)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Code enforcement of weed lots, abandoned vehicles, graffiti and dilapidated buildings</td>
<td>27%</td>
<td>5</td>
<td>41%</td>
<td>10</td>
<td>0.1579</td>
<td>1</td>
</tr>
<tr>
<td>Safety of your drinking water</td>
<td>55%</td>
<td>1</td>
<td>80%</td>
<td>4</td>
<td>0.1112</td>
<td>2</td>
</tr>
<tr>
<td>Cleanliness of city streets and public areas</td>
<td>29%</td>
<td>4</td>
<td>64%</td>
<td>8</td>
<td>0.1060</td>
<td>3</td>
</tr>
<tr>
<td><strong>Medium Priority (IS &lt;.10)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reliability of your electric service</td>
<td>39%</td>
<td>3</td>
<td>84%</td>
<td>3</td>
<td>0.0635</td>
<td>4</td>
</tr>
<tr>
<td>Quality of residential garbage collection</td>
<td>39%</td>
<td>2</td>
<td>85%</td>
<td>1</td>
<td>0.0582</td>
<td>5</td>
</tr>
<tr>
<td>Household hazardous waste disposal service</td>
<td>11%</td>
<td>8</td>
<td>50%</td>
<td>9</td>
<td>0.0530</td>
<td>6</td>
</tr>
<tr>
<td>Cleanliness of your neighborhood</td>
<td>18%</td>
<td>6</td>
<td>71%</td>
<td>7</td>
<td>0.0521</td>
<td>7</td>
</tr>
<tr>
<td>Quality of residential curbside recycling services</td>
<td>17%</td>
<td>7</td>
<td>83%</td>
<td>2</td>
<td>0.0284</td>
<td>8</td>
</tr>
<tr>
<td>Bulky item pick-up/removal services</td>
<td>10%</td>
<td>9</td>
<td>74%</td>
<td>6</td>
<td>0.0260</td>
<td>9</td>
</tr>
<tr>
<td>Quality of residential yard waste collection</td>
<td>8%</td>
<td>10</td>
<td>75%</td>
<td>5</td>
<td>0.0187</td>
<td>10</td>
</tr>
</tbody>
</table>

### Residential and Neighborhood Services Priorities:
Summary and Conclusions

- Residents generally have a positive perception of the City
- Satisfaction is the same in most areas of the City
- Austin is setting the standard for customer service among other large U.S. cities with a population of more than 250,000
  - Overall satisfaction with City services rated 11% above the large national average
  - Customer service rated 25% above the large national average
- Opportunities for Improvement that will have the most positive impact on overall satisfaction over the next year:
  - **Traffic Flow** is clearly the top priority for residents!
  - Other priorities include:
    - Planning, development review, permitting and inspection services
    - Public safety services
    - Maintenance of major city streets
    - Health and human services
Questions?

THANK YOU!!