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SDDOT 2018 Statewide Customer Satisfaction Assessment

Study SD2018-01 Final Report

**Prepared by
ETC Institute
Olathe, KS**

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16. Abstract <p>This report summarizes perceptions of the South Dakota Department of Transportation's performance in delivering services to residents and key customer groups across South Dakota. It is the eighth in a series of surveys that tracks and monitors attitudes and needs among SDDOT customers, including the general public, farmers, emergency vehicle operators, and trucker/shippers. The study includes opinions of 1,318 residents, 240 truckers/shippers, 109 emergency vehicle operators, 191 farmers/ranchers, 252 senior citizens, 30 state legislators, and 119 contractors.</p> <p>Key objectives that guided this research were to: assess the opinions of the public and key customer groups regarding the composition, importance, and delivered quality of the SDDOT's key products and services; assess the opinions of key business partners regarding the effectiveness of SDDOT's business practices and relationships; assess progress in addressing customer concerns through SDDOT's ongoing efforts to develop and execute strategic plans; and identify specific actions SDDOT can take to improve its performance and the perception of customer groups and business partners regarding its performance.</p> <p>By objectively assessing the opinions of the general public and key customer groups, this research provides a framework to help senior SDDOT managers continually identify and to respond to the needs of its customers over time.</p>			
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1 EXECUTIVE SUMMARY

1.1 Problem Description

In 2018, the South Dakota Department of Transportation (SDDOT) conducted a Statewide Customer Satisfaction Survey of residents and key customer groups, including senior citizens, truckers, farmers/ranchers and emergency vehicle operators. The purpose of the assessment was to gather statistically valid data from residents and persons who impact transportation decisions in the State of South Dakota to help identify short-term and long-term transportation priorities for the Department. The survey findings presented in this report will be used as part of SDDOT's on-going strategic planning process. SDDOT previously completed statewide Customer Satisfaction Surveys in 1997, 1999, 2002, 2004, 2006, 2011, and 2015.

1.2 Objectives

The 2018 SDDOT Customer Satisfaction Assessment had four primary objectives.

1. To assess the opinions of the public and key customer groups regarding the composition, importance, and quality of the Department of Transportation's key products and services. This objective was addressed by asking customers to objectively assess the Department's performance in key areas of service delivery. Stakeholder interviews were used to identify the expectations and concerns of external customers. Internal interviews with SDDOT managers were implemented to identify the informational needs of SDDOT employees. The "Significant Findings" section of this report has been developed to address this objective.
2. To assess the opinions of key business partners regarding the effectiveness of SDDOT's business practices and relationships. This objective was accomplished through the administration of a statistically valid survey to contractors. The surveys gathered input on a wide range of issues related to SDDOT's business practices including: the effectiveness of communication with business partners, the electronic bid letting system, paper work requirements, the technical competence of SDDOT employees, and other issues. The "Significant Findings" section of this report has been developed to address this objective along with Appendix D, which contains the results of the Contractor survey, and Appendix F, which contains the results for each of the other key customer groups surveyed.
3. To assess progress in addressing customer concerns through SDDOT's ongoing efforts to develop and execute strategic plans. This objective was accomplished by linking each question on the survey to specific elements in the Department's Strategic Plan. By identifying the relationship between survey questions and the Strategic Plan prior to the administration of the survey, SDDOT was able to link the results of the survey to specific components of the Strategic Plan. The "Conclusions" Section of this report has been developed to address this objective.
4. To identify specific actions that the Department can take to improve its performance and the perception its customers have of the Department. This objective was addressed by using the results of the survey to identify the areas that should be priorities for the Department over the next two years. The "Recommendations" Section of this report has been developed to address this objective.

2 TASK DESCRIPTIONS

The 2018 SDDOT Customer Satisfaction Assessment consisted of ten major tasks. Each of these tasks is described below and on the following pages.

2.1 Task 1: Initial Meeting

Initial meeting with the project's technical panel to review the project's scope and work plan. In June 2018, ETC Institute conducted a virtual meeting with the members of the project's technical panel to ensure that all members of the project team had the same understanding of the goals and objectives for the project. At this meeting, the details of the research design strategy were discussed, and the research objectives were finalized. A list of transportation stakeholders and the SDDOT managers to be interviewed were also developed along with a list of questions that should be asked of these individuals. In addition, ETC Institute began reviewing prior surveys and research administered previously by the SDDOT to ensure that the research efforts for this project would build on previous studies.

2.2 Task 2: Prepare Scripts for Stakeholder Interviews and Focus Groups.

Based on the input from the initial meeting, ETC Institute developed three scripts: (1) internal stakeholder interviews, (2) external stakeholder interviews, and (3) the focus groups. The project's technical panel provided input on the scripts during the month of July. The scripts were all finalized in early August 2018.

2.3 Task 3: Stakeholder Interviews

Interviews were conducted with senior SDDOT managers along with interviews with key transportation stakeholders from across the State of South Dakota. Based on issues identified at the initial planning meeting, ETC Institute designed and administered a short open-ended interview that was administered to SDDOT managers (internal stakeholders) and stakeholders outside the department (external stakeholders). The purpose of the internal and external stakeholder interviews was to assess the perceptions that senior SDDOT managers and external stakeholders have about the delivery of services provided by the South Dakota Department of Transportation. The information from the internal and external interviews was used to develop questions for the statewide survey that was administered during the fall of 2018.

2.3.1 Internal Stakeholder Interviews

ETC Institute conducted one-on-one interviews with senior SDDOT managers during August 2018. The purpose of the internal interviews was to gather input about a wide range of issues related to the planning of SDDOT's statewide customer satisfaction survey. The full summary of the internal stakeholder interviews is provided in Appendix B. Selected findings are listed below:

- Every member of the Executive Team rated the overall quality of the State's transportation system as good or excellent.
- All members of the Executive Team thought the survey was valuable to the Department.
- Most (30 of 37) of the senior managers who were interviewed thought the State's transportation system has gotten better over the past five years.

- Winter maintenance, construction project management, and fiscal responsibility were the three items that were mentioned most frequently as strengths of SDDOT.
- Senior Managers were asked if there had been any significant internal or external changes since the last survey was conducted in 2015 that could have affected customer expectations for or satisfaction with SDDOT, two items were frequently mentioned by the managers who were interviewed: (1) funding (gas tax increase) and (2) social media and technology.

2.3.2 External Stakeholder Interviews

ETC Institute administered an external stakeholder survey online with 44 leaders of organizations outside the Department of Transportation who use transportation services or influence transportation decisions in the State of South Dakota. The surveys were also conducted during the month of August 2018. The purpose of the external interviews was to gather input about a wide range of issues related to SDDOT's upcoming statewide customer satisfaction survey. The full summary of the external stakeholder interviews is provided in Appendix A. Selected findings are listed below:

- Most (36 of 44 respondents) of the external stakeholders rated the quality of South Dakota highways as either "excellent" or "good"; only eight rated the quality as "average," and no respondents gave a "poor" rating.
- More than half (59%) of the external stakeholders indicated South Dakota's highways are either "much safer or "somewhat safer" compared to 5 years ago; 30% thought the safety was "about the same," and 7% indicated they were "somewhat less safe."
- All of the external stakeholders indicated the services provided by SDDOT are an "excellent" or "good" value for the State and Federal tax revenue the Department receives.
- Air, freight, and bicycle/pedestrian improvements were the top alternate transportation priorities based on the responses from external stakeholders who could think of unmet transportation needs.
- External stakeholders indicated that budget restrictions, funding, and implementing new technology would be some of the biggest challenges for SDDOT over the next five to 10 years.
- Half (22 of 44 respondents) indicated they think it is "very important" for SDDOT to continue to manage all 13 rest areas they currently manage; only 14 respondents indicated it was "somewhat important," three respondents indicated it is "not important," and five respondents indicated they were "not sure."

2.4 Task 4: Conduct Focus Groups

Conduct focus groups. During the week of August 27-29, 2018, ETC Institute facilitated a total of 12 focus groups with residents and key customer groups of the South Dakota Department of Transportation (SDDOT). These key customer groups included residents, farmers, emergency vehicle operators, truckers/shippers and senior citizens. The focus groups were conducted with transportation stakeholders at four sites across the State of South Dakota including Aberdeen, Pierre, Rapid City and Sioux Falls. Each city hosted three focus groups. Focus groups were designed and administered to accomplish the following objectives:

1. Identify the core expectations that residents and key customer groups had about the delivery of transportation services. This involved a discussion about which services are most important and why. Since expectations for transportation services change over time, the focus groups were used to validate the types of information that are being gathered on the survey and to measure satisfaction with services that had not been assessed in previous surveys.
2. Understand how residents and key customer groups evaluate the SDDOT's performance in different areas. This involved a discussion about what constitutes good (or bad) service delivery in order to identify performance measures that will assist SDDOT in better evaluating the delivery of specific services.
3. Identify ways that residents and core customer groups think the SDDOT could improve the delivery of specific services. This involved the solicitation of ideas regarding improvements to existing services as well as a discussion regarding the need for services that are not currently provided.

To ensure that the focus groups met their intended purposes, the following steps were carried out:

- A moderator's script was developed by ETC Institute based on input from SDDOT staff and others as appropriate; moderators met with SDDOT staff to ensure that the project's goals were understood and achieved.
- A time line was developed for the focus groups ensuring that each of the major topic areas was covered in the 90-minute period. The moderator(s) rehearsed the script with a test audience at ETC Institute's focus group facility before the focus groups were conducted.
- A notebook was developed to ensure that note taking efforts are uniform. The notebook contained an outline of the moderator's script and provided ample room to write comments. Different notebooks were used to record comments from each of the focus groups.
- Debriefings were conducted at the end of each focus group to ensure that all pertinent points were captured and recorded.
- Notes from the completed focus group sessions were compiled and reviewed by the senior staff at ETC Institute for content and accuracy. The notes were compared to audio recordings of each meeting to ensure that all the information was accurate.

A total of 97 persons attended the 12 focus groups. Four focus groups were conducted with residents. Of the 108 individuals who attended the focus groups, there were 9 emergency vehicle operators, 16 farmer/agriculture participants, 11 seniors/persons with disabilities, 13 truckers/shippers, 20 contractors, and 28 residents.

A wide range of topics were covered during the focus groups. Topics were grouped into nine major areas of discussion:

- | | |
|---------------------------------------------|---------------------------------------------|
| • Awareness of SDDOT | • Special Issues for Key Customer Groups |
| • Perceptions of the State's Highway System | • Economic Development Issues, Airport/Rail |
| • Construction/Detours | • Public Information/Communication |
| • Interaction with Local Communities | • Value Provided by SDDOT |

2.5 Task 5: Summarize Focus Group Findings

Following the completion of the focus groups, ETC Institute prepared a written summary of the findings and presented the findings to the technical panel during a webinar in September 2018. The full summary of the focus group findings is provided in Appendix C.

2.6 Task 6: Develop Survey Instruments

Based on the results of the interviews and feedback from the Executive Team, ETC Institute designed multiple survey instruments. One survey was designed to gather input from residents and key customer groups including truckers/shippers, emergency vehicle operators, farmers/ranchers, contractors, legislators, and senior citizens. A second survey was developed to gather input from contractors.

The resident survey/key customer group survey was approximately 20 minutes in length and was administered by a combination of mail, phone, and the Internet. The contractor survey was about 12 minutes in length and was administered by email and phone to contractors who had done work for SDDOT during the previous two years.

After several iterations/drafts of each survey, the surveys were approved by the Technical panel in October 2018.

2.7 Task 7: Conduct Surveys

ETC Institute conducted a statewide survey of residents during the fall of 2018. The purpose of the surveys was to gather statistically valid data from transportation stakeholders and residents to objectively assess the relative importance of a wide range of issues that were identified during survey design process. The methodology for each survey is briefly described below.

2.7.1 Contractor Survey

A separate contractor survey was administered to contractors who do business with the Department. The survey was designed to gather qualitative input from contractors regarding the perceptions of working with the Department. A total of 119 contractors completed the contractor survey online. The sample of 119 contractors has a 95% level of confidence with a precision of at least 9%.

2.7.2 Resident and Key Customer Group Survey

The resident survey was administered to a stratified sample of 1,318 South Dakota residents during the fall of 2018. The sample was stratified to ensure the completion of at least 300 surveys in each of the four SDDOT regions. The survey was administered by mail, phone, and the Internet and took approximately 20 minutes to complete. The statewide sample of 1,318 residents has a 95% level of confidence with a precision of at least $\pm 2.7\%$. The table below shows the goal and actual number of surveys that were completed in each of SDDOT's four regions.

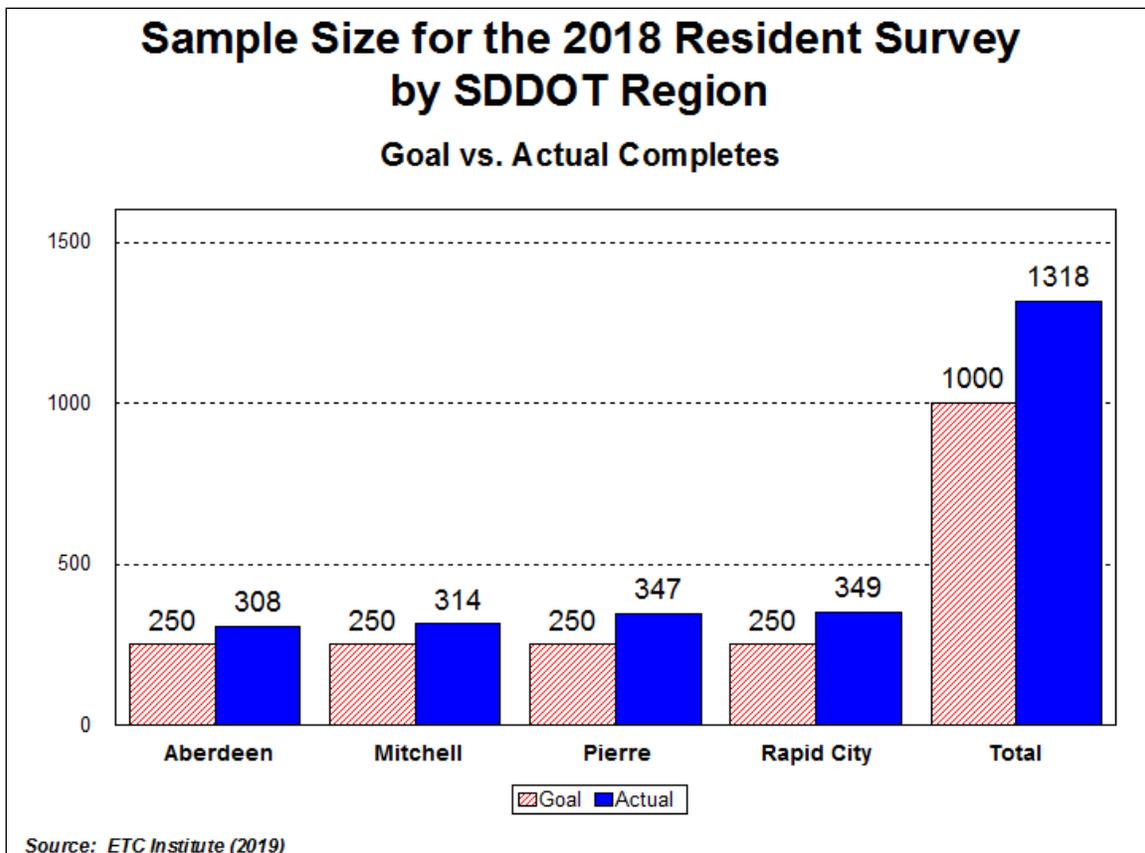


Figure 1: Resident Survey Sample Size by Region

In addition, to residents, the survey sampled representative from several key customer group. The number of surveys that were completed with each customer group is provided below:

- 240 truckers/shippers
- 109 emergency vehicle operators
- 191 farmers/ranchers
- 252 senior citizens/persons with disabilities
- 30 state legislators

2.8 Task 8: Present Findings to the Project’s Technical Panel

In January 2019, ETC Institute conducted a webinar during which the results and analysis of the all surveys were presented. The presentation included the following:

2.8.1 Comparisons of the Results Among Different Customer Groups

In addition to the survey conducted among South Dakota residents, surveys were also conducted with key customer groups who have a prominent stake in the delivery of SDDOT services. These key customer groups included farmers/ranchers, shippers/truckers, emergency vehicle operators, contractors, and senior citizens. To ensure that potential differences between key customer groups were identified, individual analysis was conducted for each of the customer groups that were surveyed.

2.8.2 GIS Mapping

GIS Mapping was used to identify potential areas of concern based on the geographic location of the respondent's home. Survey results were geocoded to the home address of respondents to the resident survey. This technique allowed the survey data to be integrated with geographic information systems (GIS), which allowed ETC Institute to prepare maps that show overall satisfaction with specific SDDOT services. The maps are provided in Appendix E of this report. Figure 2 shows the location of respondents to the survey.

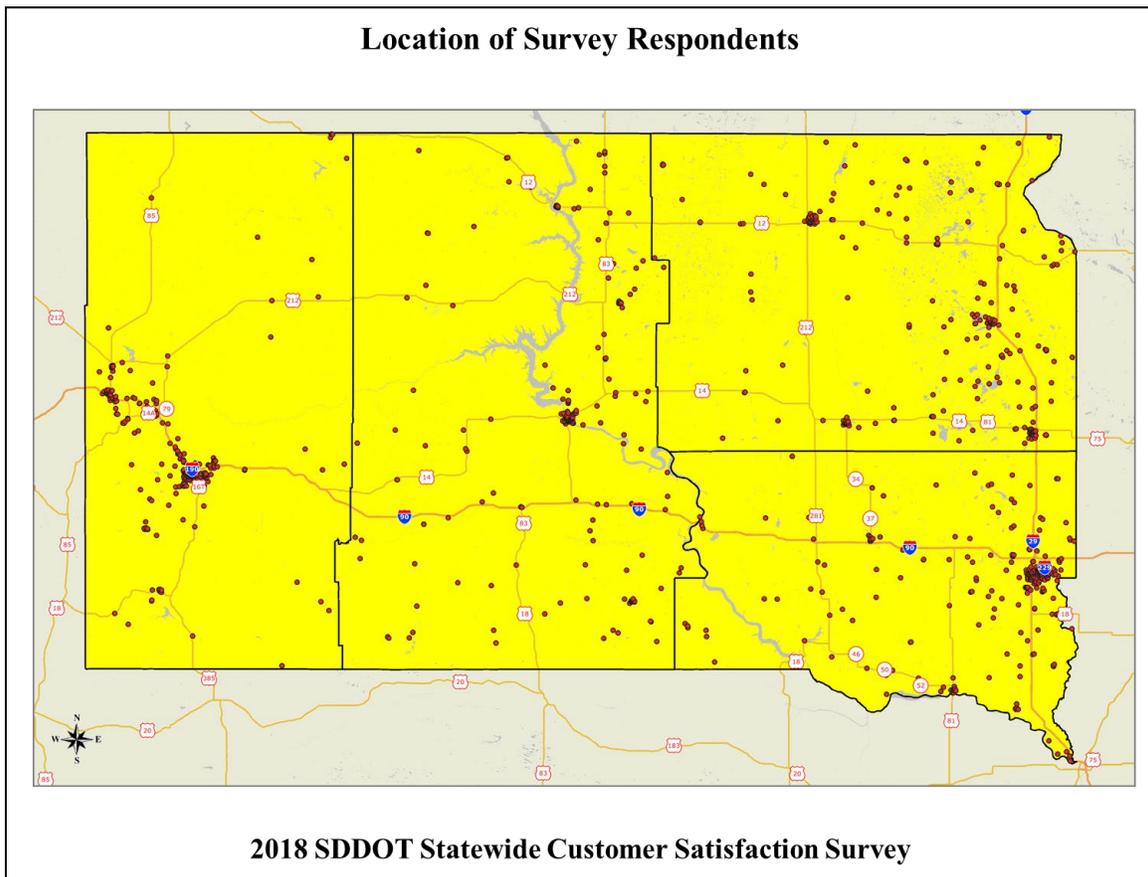


Figure 2: Location of Survey Respondents

2.8.3 Regional Analysis

Although the primary objective of the Statewide Customer Satisfaction Survey is to evaluate the delivery of services, overall findings may camouflage important differences that exist within regions of the state. To ensure potential differences are identified when they occur, individual analysis was conducted for each of the four regions (Aberdeen, Mitchell, Pierre and Aberdeen) that constitute the SDDOT. The results for each question on the survey were tabulated by region and significant differences are noted where applicable in subsequent sections of this report. The results for each region are provided in Appendix F.

2.9 Task 9: Final Report

ETC Institute prepared a final report summarizing research methodology, findings, conclusions and recommendations, as well as copies of the survey instrument that were used. This report included, but was not limited to, the following items:

- Summary report documenting the survey purpose, methodology, major findings, conclusions, and recommendations.
- Summary of External Stakeholder Interviews
- Summary of Internal Stakeholder interviews
- Summary of Focus Groups
- Contractor Survey Findings Report
- GIS Maps of Selected Survey Results
- Survey Results by Region
- Survey Results For Key Customer Groups
- Copies of the survey instruments

2.10 Task 10: Executive Presentation

On April 15, 2019, ETC Institute made a final presentation of the results to SDDOT's Research Review Board. The presentations focused on the results of the survey, and recommendations for action. A copy of the presentation is provided in Appendix I.

3 SIGNIFICANT FINDINGS—RESIDENT AND STAKEHOLDER SURVEYS

The 2018 Customer Satisfaction Assessment was designed to evaluate SDDOT's performance in 11 major areas:

- Interstate and Rural Divided Highways
- Two-Lane and Undivided Highways
- Construction and Detours
- Highway Safety
- Rest Areas
- Roundabouts, Intersections, and Interchanges
- Information and Communication
- Customer Service
- Attitudes Toward Transportation
- Environmental Issues

Significant findings for the Resident and Stakeholder surveys for each of these areas follow.

3.1 Interstate and Rural Divided Highways

Most residents across the state gave satisfied ratings when asked to rate 15 items related to the services and features of Interstates and divided highways. Some of the specific findings that were related to interstate and rural divided highways in South Dakota are listed below.

- Overall, 76% of residents indicated they were satisfied with Interstate and rural divided highways in South Dakota; 16% gave a neutral rating, and 8% indicated they were dissatisfied.
- The condition of guardrails (90%), overall flow of traffic (85%), and directional, regulatory, and informational signage (83%) received the highest levels of satisfaction among the 15 items that were rated.
- Residents indicated they were least satisfied with the visibility of pavement markings in wet weather (61%).
- The overall flow of traffic on highways saw a significant increase from 81% in 2015 to 85% in 2018.
- The smoothness of surface on highways (57%) and snow and ice removal during winter (57%) were the top two priorities for residents when asked to indicate which four items they think should receive the most emphasis from the Department of Transportation on Interstate and rural divided highways in South Dakota over the next two years.

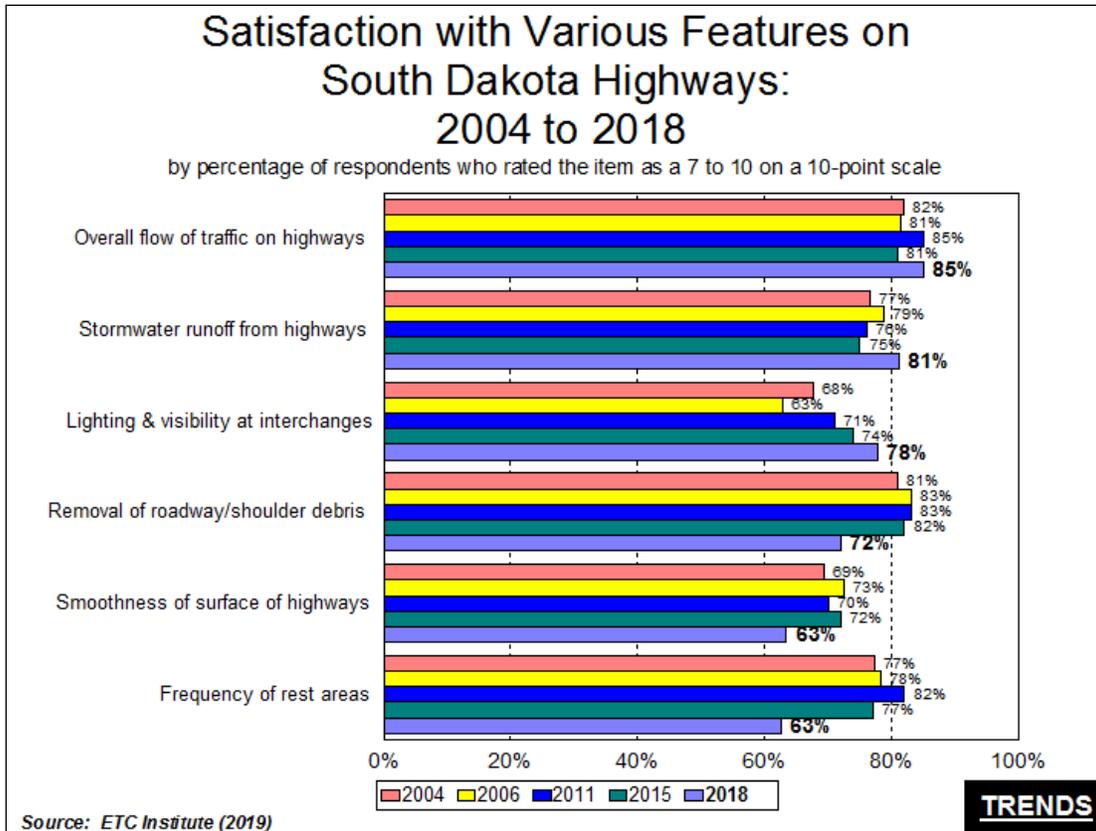


Figure 3: Interstate and Rural Divided Highway Ratings

Figure 4 shows the satisfaction levels among key customer groups in the top three areas of Interstate and rural divided highways. The totals are based on the percentage of respondents who rated the item as a 7 to 10 on a 10-point scale, where 10 means “extremely satisfied.”

Q1. Interstate and Divided Highway Services and Features			
Customer Group	Most Satisfied	2nd Most Satisfied	3rd Most Satisfied
Emergency Vehicle Operator	Condition of guardrails (89%)	Drainage from surface of highways (83%)	Overall flow of traffic (80%)
Rancher	Condition of guardrails (90%)	Visibility of signs at night (88%)	Overall flow of traffic (87%)
Senior	Condition of guardrails (92%)	Overall flow of traffic (87%)	Snow & ice removal during winter (86%)
Trucker	Condition of guardrails (86%)	Overall flow of traffic (85%)	Roadside care (e.g. mowing, removing overgrowth) (80%)
Other	Condition of guardrails (90%)	Overall flow of traffic (84%)	Directional, regulatory, & informational signage (83%)

Figure 4: Satisfaction with Interstate and Divided Highway

3.2 Two-Lane and Undivided Highways

Most residents across the state gave satisfied ratings when asked to rate 15 items related to the services and features of 2-lane and undivided highways. Some of the specific findings that were related to 2-lane and undivided highways in South Dakota are listed below.

- Overall, 60% of residents indicated they were satisfied with 2-lane and undivided highways in South Dakota; 27% gave a neutral rating, and 13% indicated they were dissatisfied.
- The condition of guardrails (80%), overall flow of traffic (77%), and directional, regulatory, and informational signage (73%) received the highest levels of satisfaction among the 15 items that were rated.
- Residents indicated they were least satisfied with the frequency of rest areas (46%).
- Snow and ice removal during winter (56%) and the smoothness of surface highways (57%) were the top two priorities for residents when asked to indicate which four items they think should receive the most emphasis from the Department of Transportation on 2-lane and undivided highways in South Dakota over the next two years.

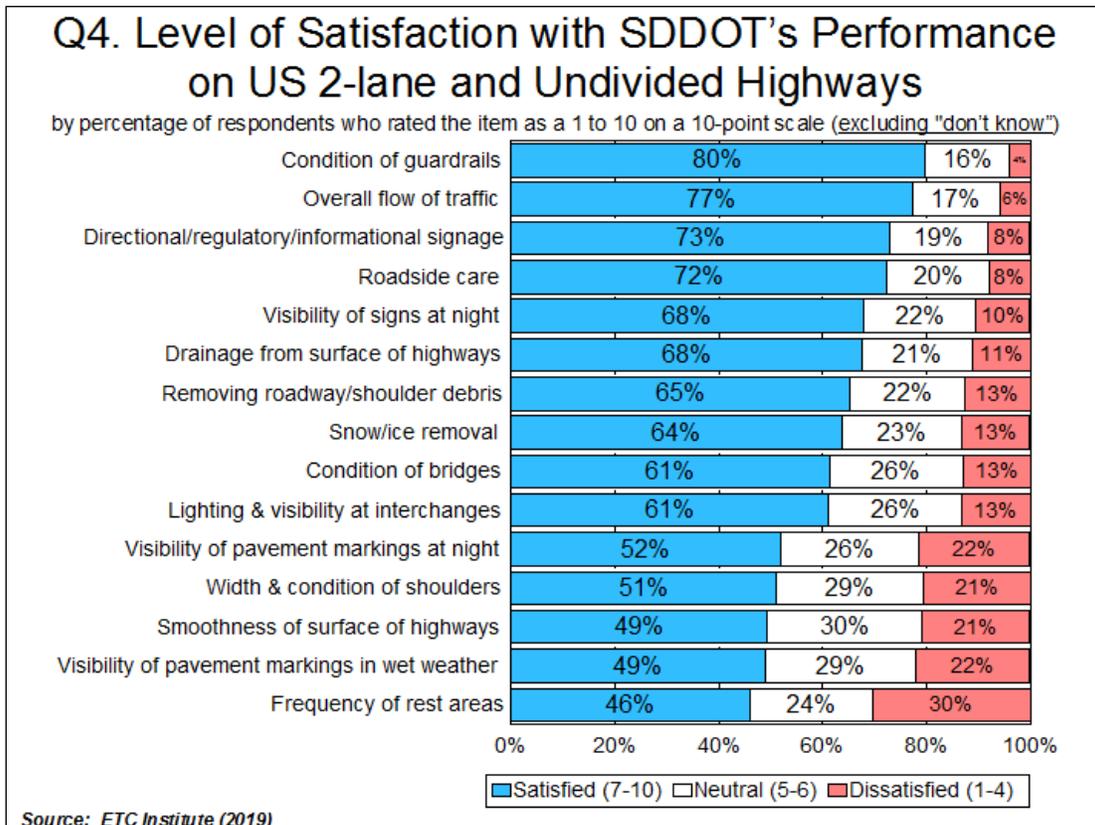


Figure 5: Two-Lane and Undivided Highway Ratings

The chart below shows the satisfaction levels among key customer groups in the top three areas of Interstate and rural divided highways. The totals are based on the percentage of respondents who rated the item as a 7 to 10 on a 10-point scale, where 10 means “extremely satisfied.”

Q4. 2-Lane and Undivided Highway Services and Features			
Customer Group	Most Satisfied	2nd Most Satisfied	3rd Most Satisfied
Emergency Vehicle Operator	Condition of guardrails (74%)	Roadside care (e.g. mowing, removing overgrowth) (72%)	Overall flow of traffic (71%)
Rancher	Condition of guardrails (84%)	Overall flow of traffic (76%)	Directional, regulatory, & informational signage (76%)
Senior	Condition of guardrails (82%)	Overall flow of traffic (76%)	Roadside care (e.g. mowing, removing overgrowth) (73%)
Trucker	Condition of guardrails (80%)	Roadside care (e.g. mowing, removing overgrowth) (76%)	Visibility of signs at night (69%)
Other	Overall flow of traffic (80%)	Condition of guardrails (78%)	Directional, regulatory, & informational signage (73%)

Figure 6: Satisfaction with 2-Lane and Undivided Highway

3.3 Construction and Detours

Nearly all respondents (95%) indicated they drove through a work zone on a highway in South Dakota During the past year. Most (57%) of respondents indicated that SDDOT completes highway construction projects in a reasonable amount of time. However, residents in Rapid City and Mitchell were significantly less likely than residents in Aberdeen and Pierre to indicate that construction projects were completed in a reasonable amount of time.

Q7c. Does SDDOT complete highway construction projects in a reasonable amount of time				
	Mitchell	Aberdeen	Pierre	Rapid City
Yes	66.40%	74.80%	78.00%	57.00%
No	33.60%	25.20%	22.00%	43.00%

Figure 7: SDDOT Completes Highway Construction Projects in a Reasonable Amount of Time by Region

- Twelve percent (12%) of residents surveyed indicated that the length (distance) of the highway work zones they experienced were “always” acceptable; 60% indicated they were “usually” acceptable, 25% indicated they were “sometimes” acceptable, and 3% indicated they were “never” acceptable. Residents gave similar ratings when asked to rate the length of time they were delayed by work zones.
- Over half (57%) of residents indicated that SDDOT completes highway construction projects in a reasonable amount of time, 26 indicated they are not completed in a reasonable amount of time, and 17% did not provide an opinion.

- Further analysis was completed by region to better understand how residents feel about the length of time it takes to complete a construction project. The table below shows how different regions felt about the length of time it takes SDDOT to complete a highway construction project. Residents in Rapid City and Mitchell were significantly less likely than residents in Aberdeen and Pierre to indicate that construction projects were completed in a reasonable amount of time.

3.4 Highway Safety

Residents and key customer groups across the state indicated they thought highway safety should be one of the top priorities for SDDOT. Some of the specific findings that were related to highway safety are listed below.

- Thirty-five percent (42%) of the residents surveyed indicated that South Dakota highways were “much safer” or “somewhat safer” than they were five years ago; 45% rated highways safety “about the same”; 6% thought highways were “somewhat more dangerous,” 2% thought they were “much more dangerous,” and 5% did not have an opinion.
- Sixty-eight percent (68%) of the residents surveyed thought that “distracted drivers” was the biggest safety concern on highways, 54% thought it was “winter conditions,” and 34% thought it was “rough roads.”
- Eighty-four percent (84%) of the residents surveyed thought that the SDDOT did a good job of providing signage in work zones on state highways.

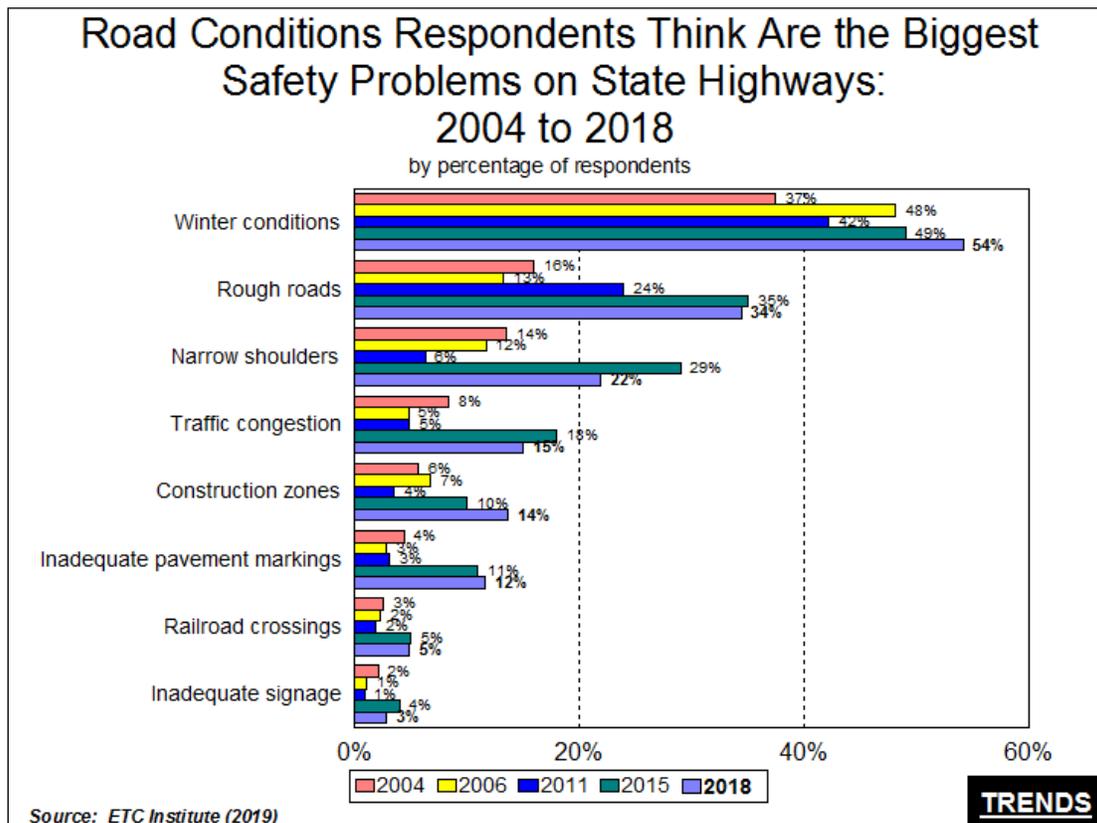


Figure 8: Biggest Safety Problems on State Highways

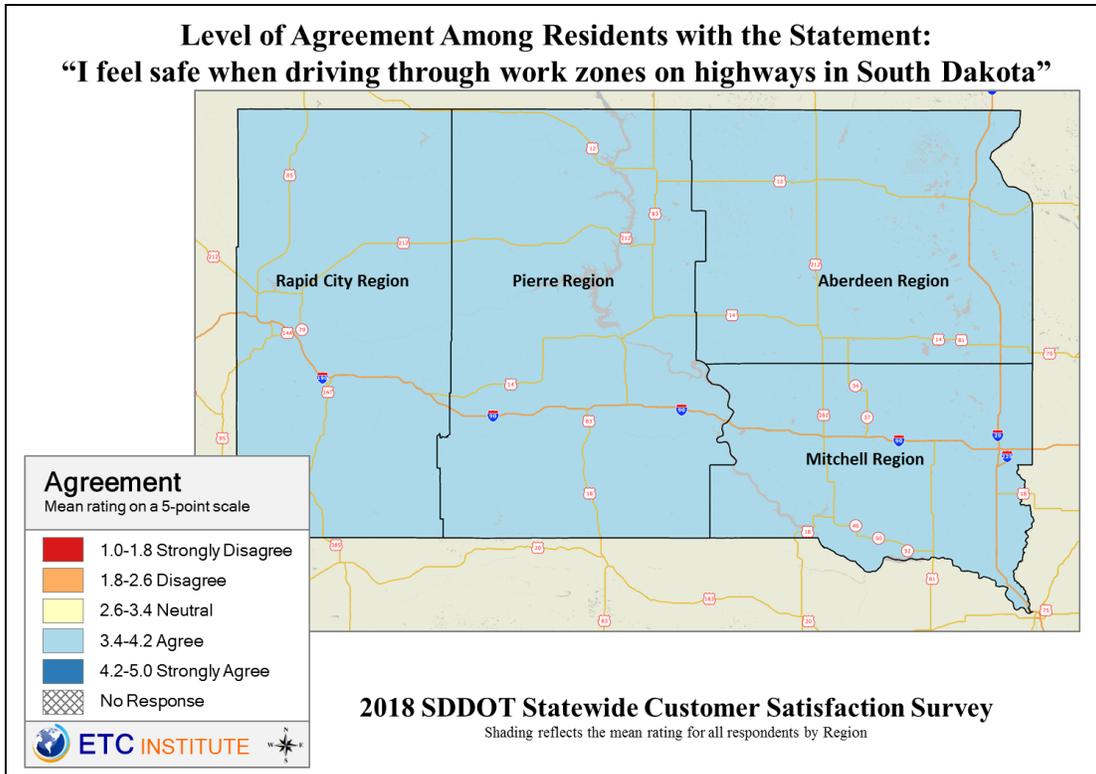


Figure 9: Regional Highway Safety Ratings

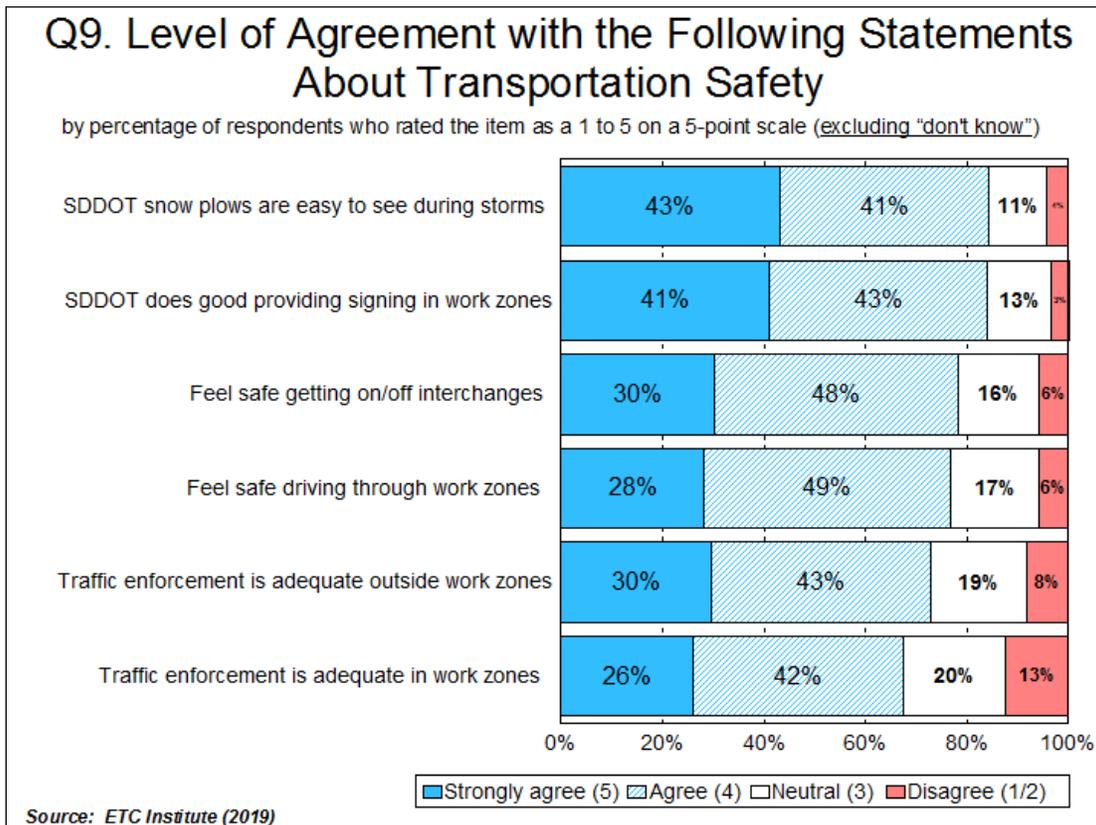


Figure 10: Transportation Safety Ratings

3.5 Rest Areas

Half of the external stakeholders (22 of 44) indicated it was “very important” for SDDOT to continue to manage all 13 rest areas that the state maintains; another 14 of the 44 respondents indicated it was “somewhat important.”

- Seventy-two percent (72%) of the residents surveyed indicated they have used Interstate rest areas in South Dakota during the past year.
- Eighty-one percent (81%) of the residents surveyed indicated they were satisfied with the rest areas they have visited in South Dakota; 11% gave a neutral rating, and 8% indicated they were dissatisfied.

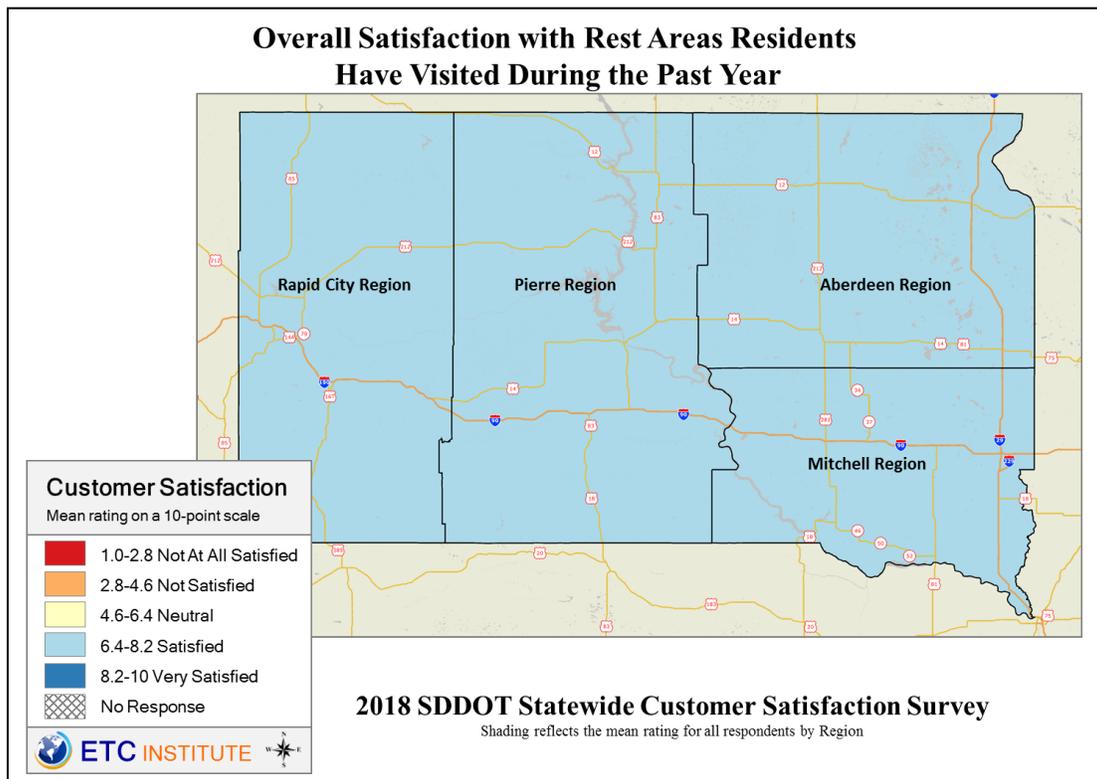


Figure 11: Regional Rest Area Ratings

3.6 Part 6: Roundabouts, Intersections, and Interchanges

Some of the specific findings related to roundabouts, intersections, and interchanges in South Dakota are listed below.

- Fifty-five percent (55%) of residents indicated they have driven through roundabouts on streets/highways in South Dakota during the past year.
- Fifty-seven percent (57%) of residents indicated they were satisfied with the roundabouts they have experienced; 18% gave a neutral rating, and 25% indicated they were dissatisfied.

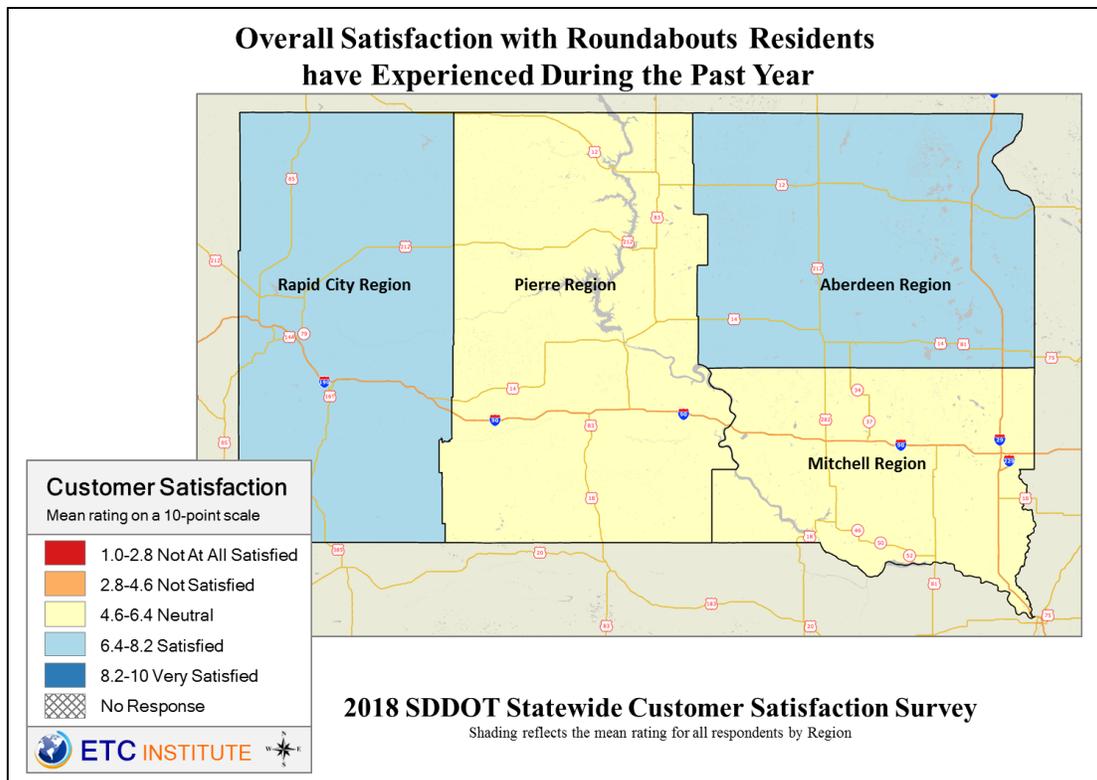


Figure 12: Reginal Roundabout Ratings

3.7 Part 7: Information and Communication

Members of the Executive Team who participated in the stakeholder interviews targeted communication as a potential area of improvement. In order to assess the effectiveness of communication programs that are currently in place, the research team included several questions about communication. Some of the major findings in this area are listed below.

- Over half (54%) of the residents surveyed who experienced construction on a State, US, or Interstate highway they regularly use indicated SDDOT provided adequate advance information to assist them in their travel plans during construction.
- Sixty-three percent (63%) of the residents surveyed indicated they have used SDDOT message boards along highways, 43% have used the SafeTravelUSA website, 31% have the SDDOT 511 app or mobile phones/tablets, and 29% have used the SDDOT website. Overall, respondents are satisfied with all the traveler information services rated on the survey.
- Road conditions during winter and other seasons (93%), road closures and re-openings (59%), and ongoing construction projects (54%) are the three types of transportation-related information residents indicated are most important.
- Seventy-two percent (72%) of residents indicated they were satisfied with SDDOT's overall efforts to keep residents informed; 19% gave a neutral rating, and 9% indicated they were dissatisfied
- Forty-nine percent (49%) of residents indicated they were satisfied with SDDOT's overall efforts to keep residents informed about road conditions; 24% gave a neutral rating, and 27% indicated they were dissatisfied

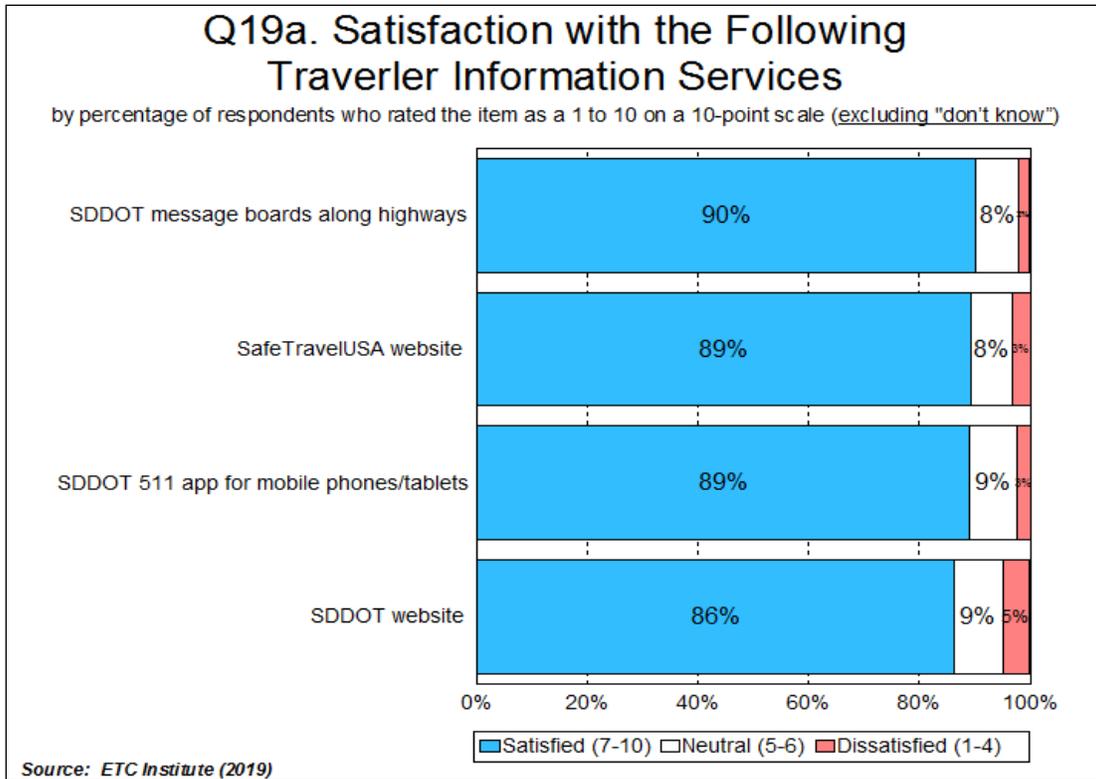


Figure 13: Satisfaction with Traveler Information Services

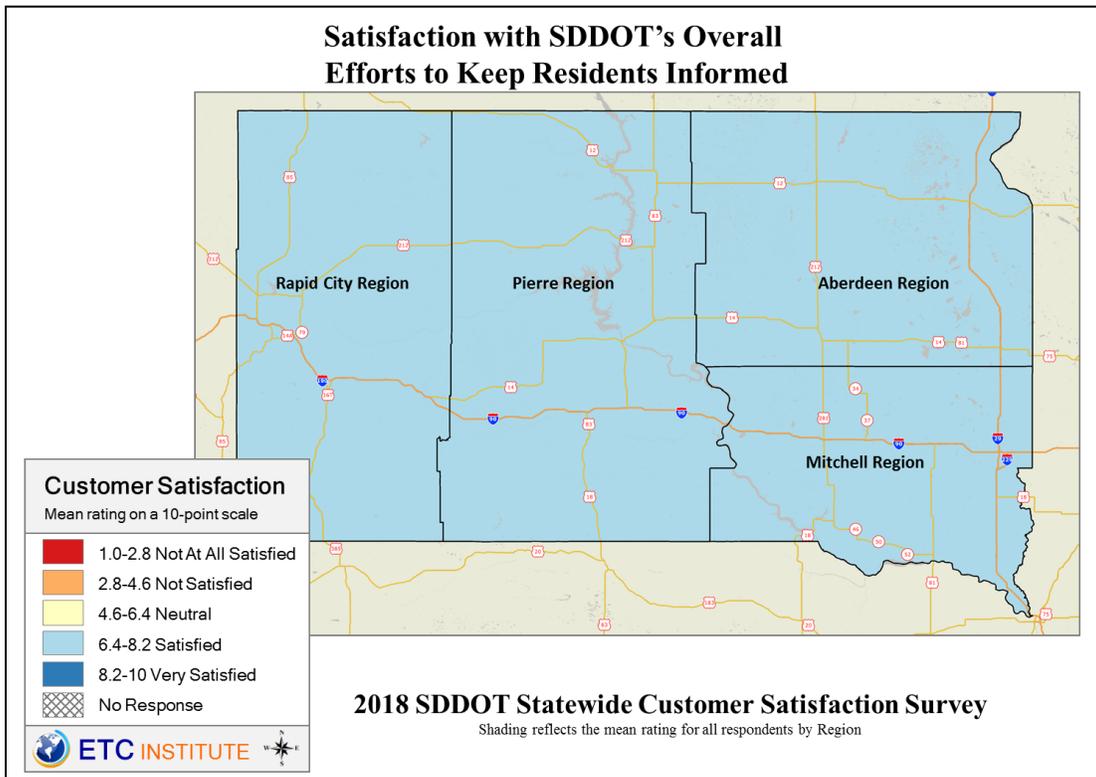


Figure 14: Reginal Roundabout Ratings

- Seventy-two percent (60%) of residents indicated they were satisfied with SDDOT’s overall efforts to keep residents informed about delays; 25% gave a neutral rating, and 15% indicated they were dissatisfied.
- Residents were asked to indicate their most preferred methods of receiving information on seven different types of transportation-related topics. Below are the top information methods for each of the seven topics:
 - Road conditions during winter and other seasons
 1. Radio (32%)
 2. Television (30%)
 3. SafeTravelUSA website (29%)
 4. 511 phone (25%)
 - Ongoing construction projects
 1. SDDOT website (23%)
 2. Television (23%)
 3. SDDOT message boards along highways (21%)
 4. SafeTravelUSA website (21%)
 - Plans for future transportation projects
 1. Television (31%)
 2. SDDOT website (26%)
 3. Newspapers (22%)
 4. Radio (20%)
 - Road closures and re-openings
 1. Television (29%)
 2. Radio (29%)
 3. SafeTravelUSA website (20%)
 4. SDDOT website (18%)
 - Crashes and other incidents that delay traffic
 1. Radio (37%)
 2. SDDOT message boards along highways (26%)
 3. Mobile phone/tablet app (22%)
 4. Television (19%)
 - Traffic conditions related to special events
 1. Radio (35%)
 2. Television (25%)
 3. SDDOT message boards along highways (22%)
 4. Mobile phone/tablet app (19%)
 - General news and information about SDDOT
 1. SDDOT website (35%)
 2. Television (25%)
 3. Radio (22%)
 4. Newspapers (19%)

3.8 Customer Service

Most (89%) of the residents surveyed indicated they have not had contact with a SDDOT employee during the past two years. Some of the specific findings related to SDDOT customer service are listed below.

- Seventy-three percent (73%) of residents who have contacted a SDDOT employee during the past two years indicated they were either “very satisfied” or “satisfied” with the level of customer service provided by SDDOT; 12% gave a “neutral” rating, 9% were “dissatisfied,” and 6% were “very dissatisfied.”

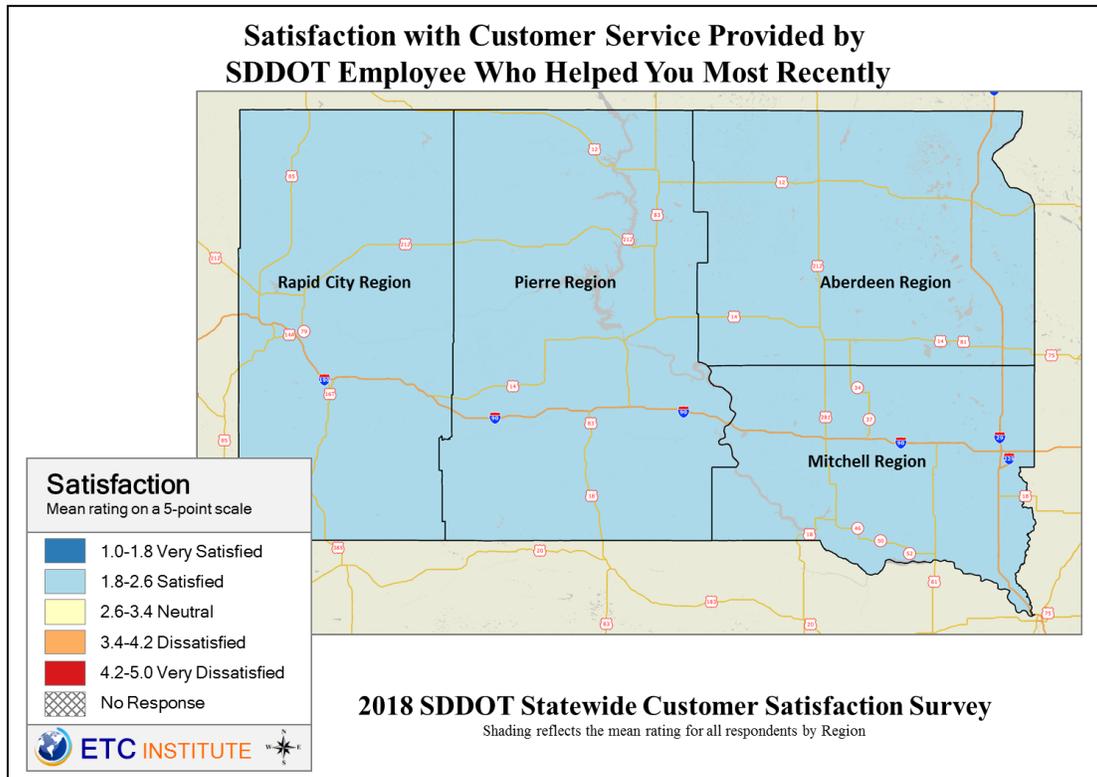


Figure 15: Regional Satisfaction Ratings with Customer Service

3.9 Attitudes Towards Transportation

Some of the specific findings related to attitudes towards transportation in South Dakota are listed below.

- Seventy-six percent (76%) of residents indicated that roads, bridges, and public transportation are “very important” to their safety and quality of life; 19% think that they are “important,” 6% they are “somewhat important,” and less than 1% indicated they are “not important.”
- Seventy-six percent (73%) of residents indicated that roads, bridges, and public transportation are “very important” to economic development and job growth; 22% think that they are “important,” 5% they are “somewhat important,” and less than 1% indicated they are “not important.”

3.10 Transportation Priorities

To help SDDOT leaders set priorities for improvement to the State’s transportation system, the survey included a series of questions that asked residents to rate the importance of various transportation priorities.

- Repairing and maintaining existing highways (95%), making safety improvements to highways (81%), and expanding transportation services for seniors and persons with disabilities (66%) are the three transportation priorities that received the highest level of “very important” and “somewhat important” ratings.

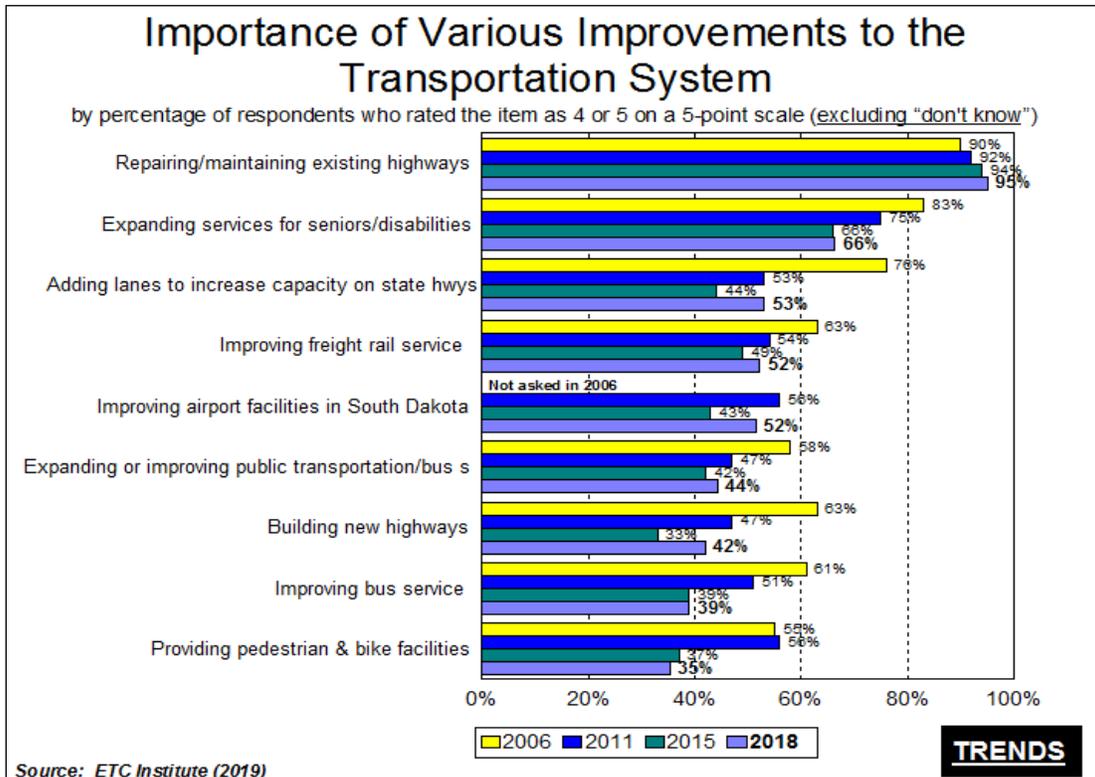


Figure 16: Transportation Priority Ratings

3.11 Environmental Issues

The 2018 SDDOT Statewide Customer Satisfaction Survey asked residents to indicate whether they think SDDOT is a good steward of the environment.

- Sixty-five percent (65%) of residents indicated that they think SDDOT is a good steward of the environment, 5% said “no,” and 30% did not have an opinion.

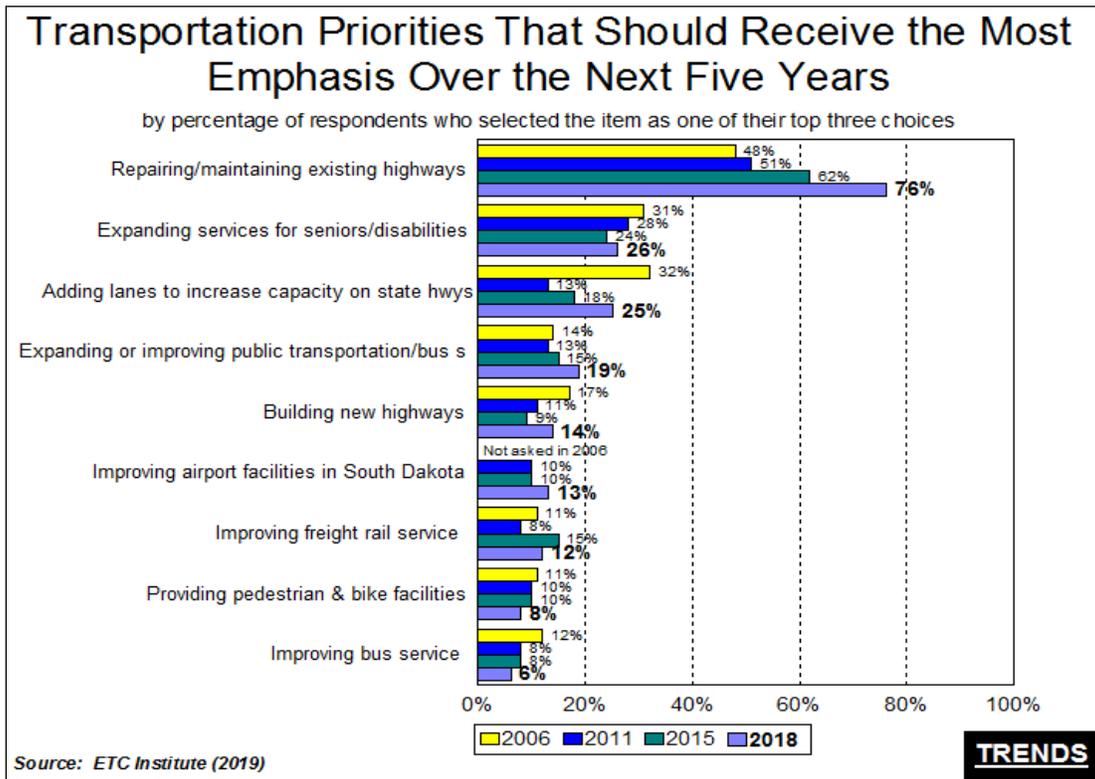


Figure 17: Transportation Priorities that Should Receive the Most Emphasis

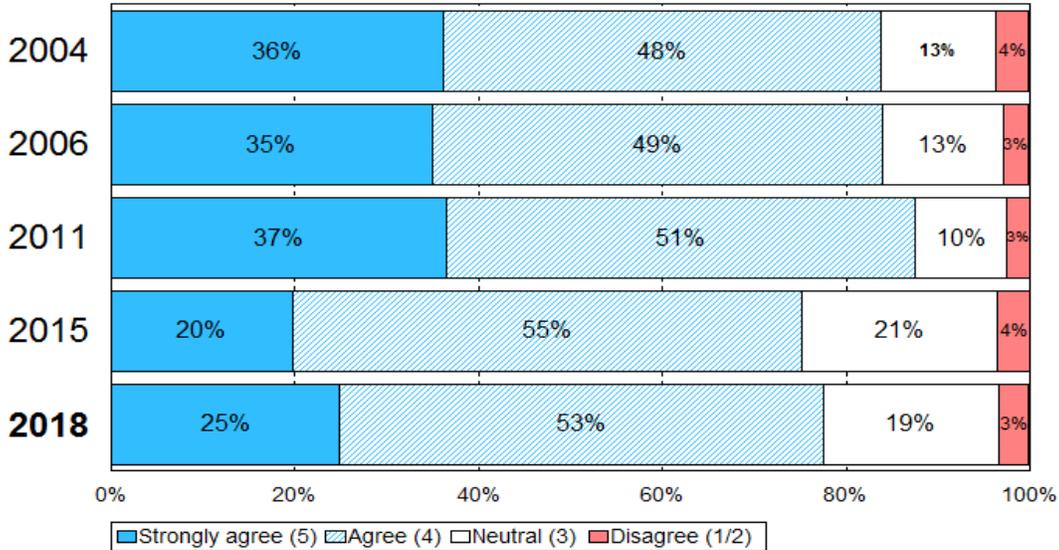
3.12 Overall Ratings of SDDOT

At the end of the survey, the research team included several questions to assess overall perceptions and satisfaction with SDDOT. The major findings are listed below.

- Thirty-four percent (34%) of residents indicated they think the current quality of SDDOT services are better compared to five years ago; 52% indicated they are “about the same,” 3% indicated they are “worse,” and 12% did not have an opinion.
- Thirty-five percent (35%) of residents rated the value of services provided by SDDOT as “good;” 46% indicated the value is “ok,” 8% indicated the value is “low,” and 12% did not have an opinion.
- Seventy-eight percent (78%) of residents think that SDDOT designs safe highways.
- Fifty-eight percent (58%) of residents think that SDDOT considers and values the opinions of the public.
- Most residents (73%) indicated they are satisfied with the overall delivery of all services that SDDOT provides.

Level of Agreement with the Statement: "The SDDOT Designs Safe Highways" 2004 to 2018

by percentage of respondents who rated the item 1 to 5 on a 5-point scale (excluding don't knows)



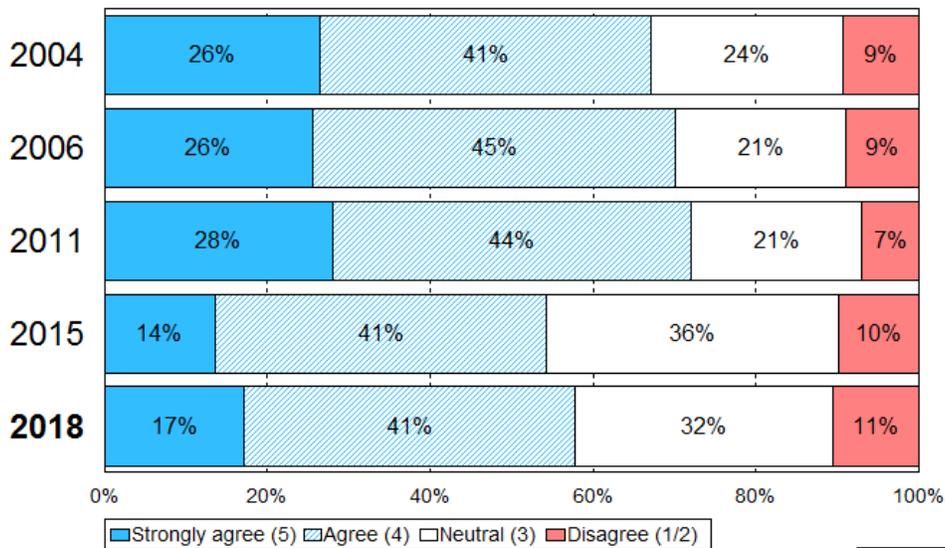
Source: ETC Institute (2019)

TRENDS

Figure 18: The SDDOT Designs Safe Highways

Level of Agreement with the Statement: "The SDDOT Considers and Values the Opinions of the Public" 2004 to 2018

by percentage of respondents who rated the item 1 to 5 on a 5-point scale (excluding don't knows)



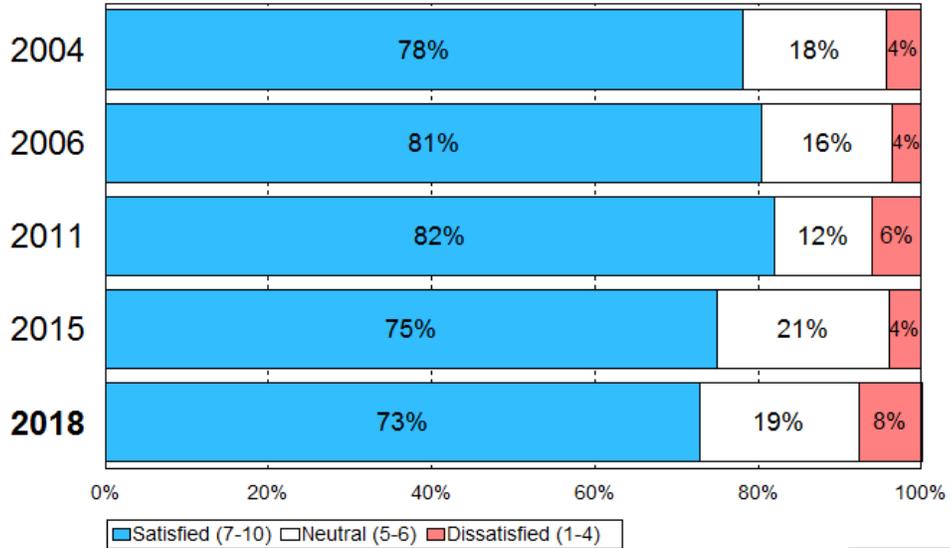
Source: ETC Institute (2019)

TRENDS

Figure 19: The SDDOT Considers and Values the Opinions of the Public

Satisfaction with the Overall Delivery of ALL Services the South Dakota DOT Provides 2004 to 2018

by percentage of respondents who rated the item as a 1 to 10 on a 10-point scale (excluding "don't know")



Source: ETC Institute (2019)

TRENDS

Figure 20: Overall Satisfaction with SDDOT Services

4 CONCLUSIONS

The following conclusions were made based upon the results of the 2018 Statewide Customer Satisfaction Survey. The supporting evidence accompanies each conclusion.

4.1 Overall Satisfaction with SDDOT Remains High

Supporting Evidence

- Seventy-three percent (73%) of the residents surveyed in 2018 indicated that they were satisfied with the overall performance of SDDOT. Only 8% of the residents surveyed were dissatisfied.

4.2 Residents Feel Safer Driving on State Highways Than They Did Five Years Ago

Supporting Evidence

- Thirty-two percent (32%) of the residents surveyed indicated that South Dakota highways were “much safer” (10%) or “somewhat safer” (32%) than they were five years ago. Only 8% of residents indicated that South Dakota highways were “somewhat more dangerous” (6%) or “much more dangerous” (2%) than they were five years ago.
- Seventy-nine percent (79%) of residents surveyed in 2018 indicated that they were satisfied with the overall feeling of safety when traveling on state, US, and Interstate highways in South Dakota.
- Winter conditions and rough roads continue to be the top safety priorities for residents.
- Fifty-seven percent (58%) of residents indicated the smoothness of surface highways and snow and ice removal during winter were the two maintenance services that should receive the most emphasis over the next two years.

4.3 SDDOT Is Providing High Levels of Customer Service

Supporting Evidence

- Seventy-three percent (73%) of the residents surveyed who had contacted SDDOT during the past year indicated they were either “very satisfied” (46%) or “satisfied” (27%) with the customer services provided by the SDDOT employee who helped them most recently. Only 15% of residents indicated they were “dissatisfied” or “very dissatisfied.”

4.4 SDDOT Is Keeping Residents Informed About Road Conditions and Delays

Supporting Evidence

- Over half (54%) of residents surveyed who have experienced construction or reconstruction on a State, US, or Interstate highway they regularly use indicated SDDOT provides adequate information to assist them in their travel plans during construction.
- Seventy-two percent (72%) of residents surveyed indicated they are satisfied with SDDOT’s overall efforts to keep them informed.
- Sixty percent (60%) of residents surveyed indicated they are satisfied with SDDOT’s efforts to keep them informed about delays and alternate routes before traveling through highway construction projects.

4.5 Contractors Are Generally Satisfied with SDDOT

Supporting Evidence

- Eighty-five percent (85%) of the contractors surveyed thought SDDOT designs safe highway; only 1% did not agree, and the remaining 14% had a neutral opinion.
- Eighty-four percent (84%) of the contractors surveyed think that the current quality of SDDOT services are “better” (46%) or “about the same” (39%) compared to five years ago.
- Seventy-seven percent (77%) of the contractors surveyed indicated SDDOT pays contractors promptly; only 1% did not agree; the remaining 22% had a neutral opinion on the issue.
- Seventy-one percent (71%) of the contractors surveyed thought SDDOT treats their organization fairly; only 11% did not; the remaining 18% had a neutral opinion on the issue.

5 RECOMMENDATIONS FOR ACTION

In addition to the findings presented previously in this report, the research team conducted a performance-needs assessment to identify priorities for the Department based on the results of the 2018 Statewide Customer Satisfaction Survey. The results of this analysis are provided below.

5.1 Interstate and Divided Highway Priorities

One method for using customer satisfaction data to help set organization priorities involves an assessment of both how well the organization is performing in an area and how important the activity is to the customers. Figure 21 shows the relative importance and satisfaction of each of the Interstate and divided highway features and services that were rated. Items on the right side of the chart were generally more important, while items on the left side were generally less important. Similarly, items listed on the top of the chart rated above average in satisfaction, which items listed on the bottom of the chart rated below average.

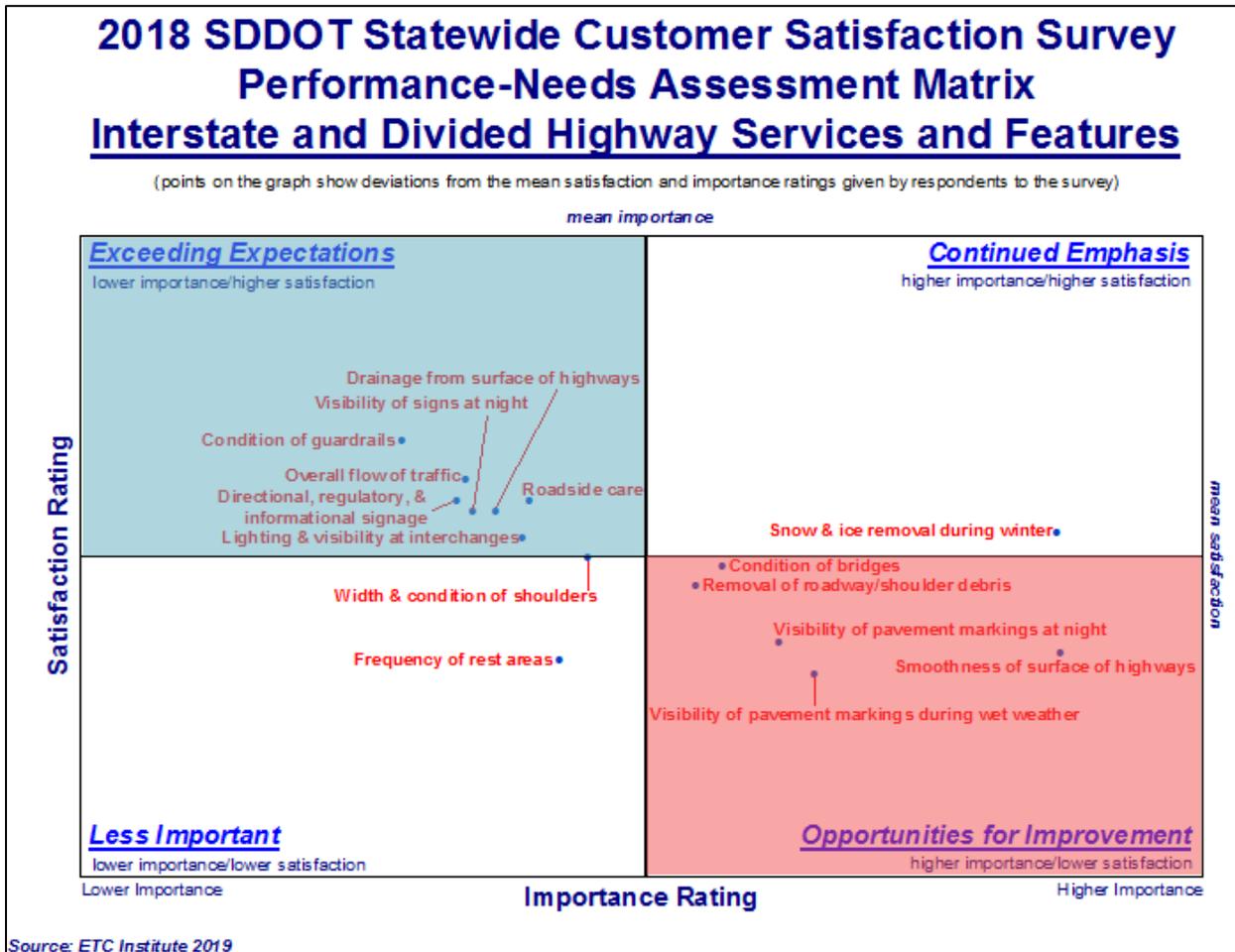


Figure 21: Interstate and Divided Highway Services and Features Performance-Needs Matrix

Based on the distribution in the chart, the areas that should receive the highest priority from the South Dakota Department of Transportation are those in the lower right quadrant labeled “opportunities for

improvement.” The items in this quadrant are generally more important to residents, but the agency is underperforming relative to customer expectations. Based on the results of this analysis, SDDOT should consider increasing its emphasis on:

- Smoothness of surface of highways
- Visibility of pavement markings during wet weather
- Visibility of pavement markings at night
- Removal of roadway and shoulder debris
- Condition of bridges

In addition to the performance-needs matrix analysis, ETC Institute performed the Importance-Satisfaction (I-S) analysis to develop ratings to help prioritize the services and features that are of the highest importance to residents and to target resources toward those features and services where residents are least satisfied. The I-S rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low, and the perceived importance of the service is relatively high. The top priorities based on the I-S analysis should closely resemble those from the matrix above.

Figure 22 shows the I-S ratings for all 15 of the services and features of Interstates and divided highways that were rated on the 2018 Statewide Customer Satisfaction Survey.

2018 Importance-Satisfaction Rating South Dakota Department of Transportation Interstates and Divided Highway Services and Features						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS >.20)						
Smoothness of surface of highways	57%	1	63%	13	0.2090	1
High Priority (IS .10-.20)						
Visibility of pavement markings during wet weather	37%	3	61%	15	0.1466	2
Snow & ice removal during winter	57%	2	78%	7	0.1227	3
Visibility of pavement markings at night	35%	4	65%	12	0.1218	4
Medium Priority (IS <.10)						
Removal of roadway/shoulder debris	28%	6	72%	11	0.0781	5
Condition of bridges	30%	5	74%	10	0.0774	6
Frequency of rest areas	17%	8	63%	14	0.0634	7
Width & condition of shoulders	19%	7	75%	9	0.0474	8
Lighting & visibility at interchanges	14%	10	78%	8	0.0309	9
Roadside care	14%	9	82%	4	0.0253	10
Drainage from surface of highways	12%	11	81%	5	0.0223	11
Visibility of signs at night	10%	12	81%	6	0.0188	12
Directional, regulatory, & informational signage	9%	14	83%	3	0.0151	13
Overall flow of traffic	9%	13	85%	2	0.0140	14
Condition of guardrails	4%	15	90%	1	0.0042	15

Figure 22: Interstate and Divided Highway Services and Features I-S Ratings

5.2 2-Lane and Undivided Highway Priorities

Using the same method that was just described, the research team analyzed the results of the survey to identify highway design issues that should be addressed. Figure 23 shows the relative importance and satisfaction of each of the 2-lane and undivided highway features and services that were rated.

Based on the distribution in the chart, the areas that should receive the highest priority from the South Dakota Department of Transportation are those in the lower right quadrant labeled “opportunities for improvement.” The items in this quadrant are generally more important to residents, but the agency is underperforming relative to customer expectations.

Based on the results of this analysis, SDDOT should consider increasing its emphasis in the following areas:

- Smoothness of surface of highways
- Visibility of pavement markings during wet weather
- Visibility of pavement markings at night
- Width and condition of shoulders
- Condition of bridges

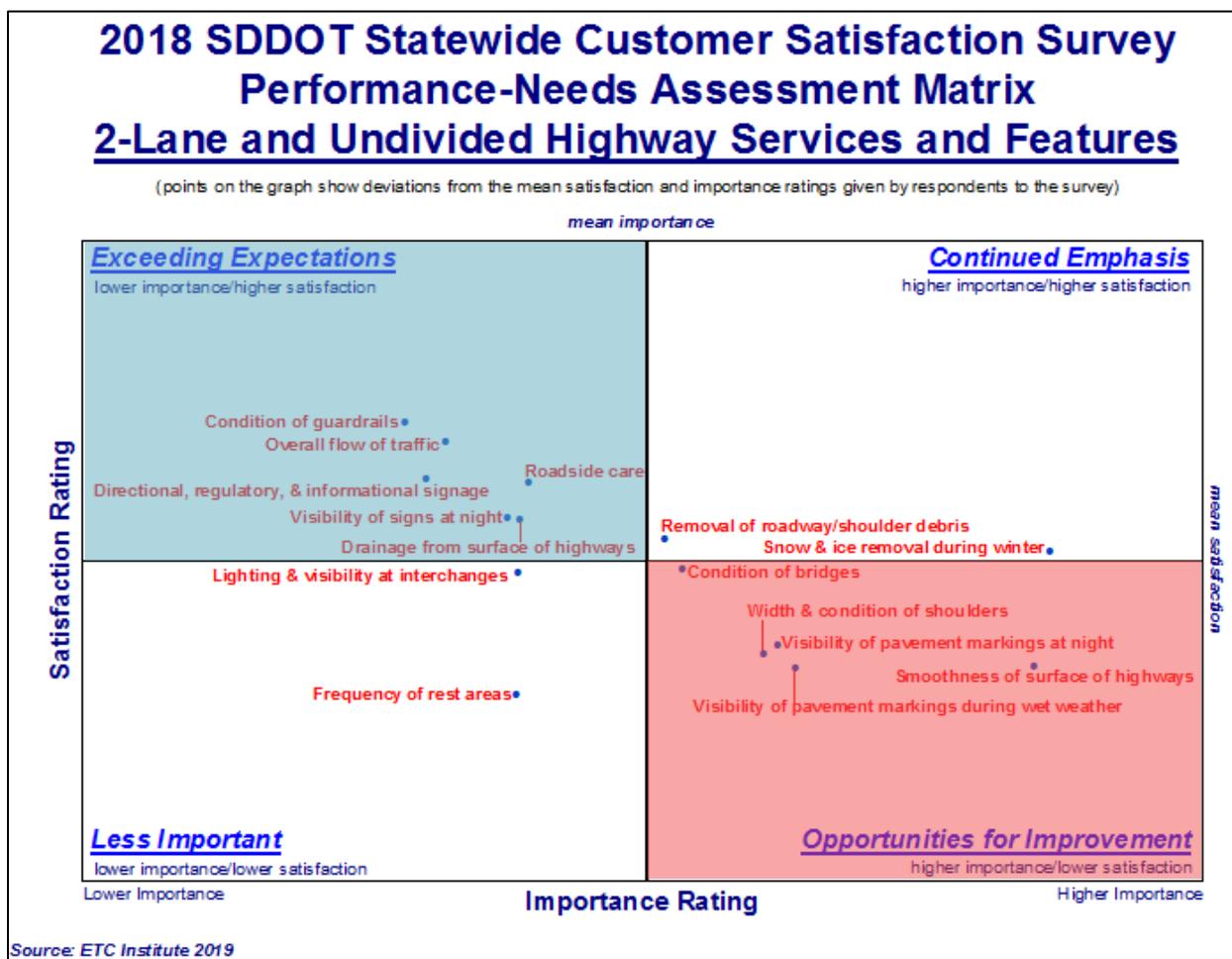


Figure 23: 2-Lane and Undivided Highway Services and Features Performance-Needs Matrix

Figure 24 shows the I-S ratings for all 15 of the services and features of 2-lane and undivided highways that were rated on the 2018 Statewide Customer Satisfaction Survey.

2018 Importance-Satisfaction Rating						
South Dakota Department of Transportation						
2-Lane and Undivided Highway Services and Features						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS >.20)						
Smoothness of surface of highways	55%	2	49%	13	0.2758	1
Snow & ice removal during winter	56%	1	64%	8	0.2022	2
High Priority (IS .10-.20)						
Visibility of pavement markings during wet weather	35%	3	49%	14	0.1792	3
Visibility of pavement markings at night	34%	4	52%	11	0.1627	4
Width & condition of shoulders	33%	5	51%	12	0.1606	5
Condition of bridges	26%	6	61%	9	0.1007	6
Medium Priority (IS <.10)						
Removal of roadway/shoulder debris	25%	7	65%	7	0.0857	7
Frequency of rest areas	13%	11	46%	15	0.0692	8
Lighting & visibility at interchanges	13%	10	61%	10	0.0507	9
Drainage from surface of highways	13%	9	68%	6	0.0423	10
Visibility of signs at night	12%	12	68%	5	0.0387	11
Roadside care	14%	8	72%	4	0.0381	12
Overall flow of traffic	7%	13	77%	2	0.0160	13
Directional, regulatory, & informational signage	6%	14	73%	3	0.0150	14
Condition of guardrails	4%	15	80%	1	0.0079	15

Figure 24: 2-Lane and Undivided Highway Services and Features I-S Ratings

5.3 Other Recommendations for Action

The results of the surveys and stakeholder interviews provide SDDOT with a comprehensive set of information to identify and manage customer-oriented improvements over the next few years. Although there are many applications for the data from the 2018 Customer Satisfaction Assessment, the research team recommends that following actions based on the results of the survey.

5.4 Emphasize Maintenance and Preservation

SDDOT should emphasize the maintenance and preservation of the existing highway system because “repairing and maintaining highways” was clearly the top priority for residents on the 2018 survey. Specific actions that should be considered in support of this recommendation include:

- Educating the public about the amount of resurfacing that has taken place on state highways over the past two years.
- Informing the public about the timeline to complete highway construction projects to ensure the public has accurate expectations as they relate to the time it takes to complete construction projects.

- Informing the public and key customer groups about how SDDOT is planning to maintain and preserve the state highway system in future years.
- Ensuring that projects that support the preservation of the existing system are given a high priority in the Statewide Transportation Improvement Program.
- Continuing to emphasize the importance of maintaining the surface of state highways to all SDDOT employees so the organization will continue to be responsive to customer expectations in this area.

5.5 Continue to Emphasize Safety

SDDOT should continue to emphasize operational investments and activities that support travel safety on state highways in South Dakota. Specific operational activities that should be considered included the following:

- In addition to addressing winter conditions which showed a significant increase among residents when asked what they thought were the biggest safety problems, the Department should also explore ways to cut down on distracted driving which is the item residents indicated was the biggest safety problem on highways in South Dakota.
- When addressing safety on highways during winter conditions, 67% of residents indicated they would favor temporarily lowering speed conditions to match road conditions. The Department should explore ways to implement lowered speed limits that match road conditions on highways throughout the state.

5.6 Improve Communication About Road Conditions

SDDOT should continue to explore new ways of informing residents about road conditions. Specific operational activities that should be considered included the following:

- The Department should explore additional methods of relaying important road condition information to residents.
- Emphasize road condition information on SDDOT message boards along highways and the SafeTravelUSA website.
- Continue to utilize the radio as a method of communicating up-to-date road condition information throughout the state.
- The Department should explore ways to work with residents to develop a centralized communication platform with easy to access and up-to-date road condition information.

5.7 Improve Interactions with Contractors

SDDOT should continue to improve the way it works with contractors. Specific actions that that should be considered in response to this recommendation could include the following:

- Empowering employees to make decisions
- Finding ways to work with contractors to shorten construction times to reduce public inconvenience

- Improving the DBE solicitation process

5.8 Clearly Define and Communicate the Department’s Role in Making Improvements

Expanding services for seniors and residents with disabilities and adding lanes to increase highway capacity were identified as the second and third most important transportation priorities after repairing and maintaining existing highways, as shown in Figure 25 below.

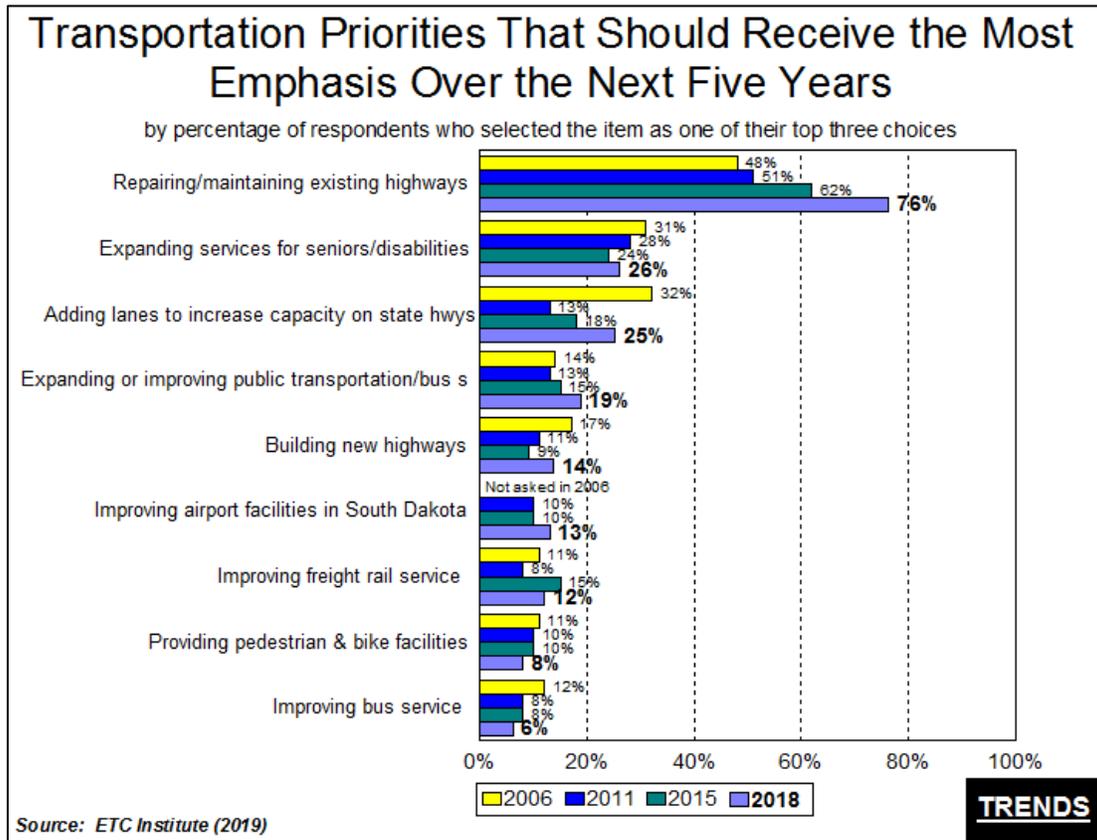


Figure 25: Transportation Priorities Over the Next Five Years

Given the importance of these issues, the Department needs to clearly define and externally communicate what its role in these areas will be. If the Department does not act to manage expectations in these areas, residents and other key customer groups may develop unrealistic expectations for the Department, which could have a negative impact on overall satisfaction in future years.

5.9 Implementation Schedule

The recommendations described above should be implemented in three steps as described below.

Step 1: SDDOT Should Market the Results of the Survey to Employees and Customers

- During the summer of 2019, SDDOT should communicate the findings of the survey with all employees using a webinar or other format.
- SDDOT should also consider issuing press releases to the media and informational notices to leaders of key customer groups to report the findings of the 2018 Customer Satisfaction Assessment and announce the Department’s plans to respond to the findings.

Step 2: SDDOT Should Establish Awareness and Accountability within SDDOT

- During the summer of 2019, the Executive Team should provide training to key staff on how to use the “dashboards” that were developed for the project. The dashboards give key staff access to the survey data in a wide range of formats to support decision-making.
- During the fall of 2019, the Executive Team should consider having subordinate managers from the Area Engineer level and above to identify specific ways that they will use the results of the 2018 Customer Satisfaction Assessment to improve organizational performance over the next two years.
- During the spring of 2020, SDDOT should consider having managers from the Area Engineer level and above provide an update to their immediate supervisor regarding how they have used the results of the 2018 Customer Satisfaction Assessment to improve their work unit’s performance as part of their performance review process.

Step 3: SDDOT Should Use the Results to Update the Department’s Strategic Plan and Other Initiatives Related to Promoting Excellence in the Organization

- The 2018 survey contains a wide range of data that can be used as performance measures for the Department’s Strategic Plan and other initiatives designed to promoting excellence in the organization. By the fall of 2019, the Executive Team should ensure that those leading the Department’s strategic planning efforts are very familiar with the results of the 2018 survey.

Step 4: SDDOT Should Initiate Another Assessment

- During 2020, SDDOT should initiate the necessary actions to conduct another Customer Satisfaction Assessment in 2020 or 2021.

6 SUMMARY AND BENEFITS

Although the short-term benefits of customer surveys are difficult to measure, the long-term impact of such processes can have a dramatic and lasting impact on an organization. The results of the 2018 Customer Satisfaction Assessment clearly demonstrate that SDDOT's on-going efforts to gather input from customers has had a positive impact on public perceptions of the Department. The Department's priorities are generally aligned with the needs of its customers, and overall satisfaction ratings with Interstates, divided highways, 2-lane highways, and undivided highways is extremely high.

By conducting surveys every few years, SDDOT has been able to provide its senior managers and employees with objective feedback from residents and the key customer groups on a regular basis. This has created a corporate culture that is customer-oriented, which has helped the Department meet the needs of its customers.

Although the customer satisfaction survey should not be the only tool the Department uses, it remains a very important tool in helping the Department balance feedback that would otherwise only be provided by special interest groups or those who have a direct stake in the outcome of major transportation planning and investment decisions. The Customer Satisfaction Assessment ensures the needs of the general public and key customers who do not interact with SDDOT on a regular basis are incorporated into the Department's decision-making process.

Despite progress in some areas, the Department still has room for improvement. To continue achieving success, SDDOT should respond to the results of this survey and be prepared to respond to new issues that will emerge in the years ahead. If resources are available, SDDOT should share the result of the 2018 survey with all employees and administer the survey again in two years. The overall assessment process engages community leaders, the general public, and key customer groups in a manner that demonstrates the Department's commitment to customer satisfaction. Because the 2018 survey differed slightly from previous surveys, SDDOT would benefit from additional surveys that gauge the way leaders at the Department respond to the results of the survey. Objectively evaluating the Department's performance over time gives leaders at the Department the ability to grade themselves on the actions they took and to course correct if necessary. This process will also help build long-term customer loyalty, which will provide immeasurable benefits to the Department in the years ahead.