REGIONAL BUSINESS PLAN SURVEY RESEARCH RESULTS

August 2010

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Poling and data: Alison Peters Consulting

Survey Methodology

Sample Universe:	Registered Voters in the Participating Agency jurisdictions: Battle Ground, Ridgefield and existing customers of Clark County Wastewater District
Research Technique:	Telephone Interviewing
Field Dates:	July 26-July 29, 2010
Sample Size:	N=600
Survey Length:	9 minutes

Margin of Error: +/- 3.98 for the overall sample, larger for subgroups

Survey Sample Demographics

Gender			**Region**	
Male	47%		Battle Ground	17%
Female	53%		Ridgefield	9%
Age			Unincorp. Clark County	74%
18-34	11%		**Income**	
35-44	17%		< $35,000 a year	18%
44-59	35%		$35,000 to $75,000 a year	35%
60+	35%		More than $75,000	32%

Reaction to Core Values

~ Which values resonated most with the public?

How did values rank?

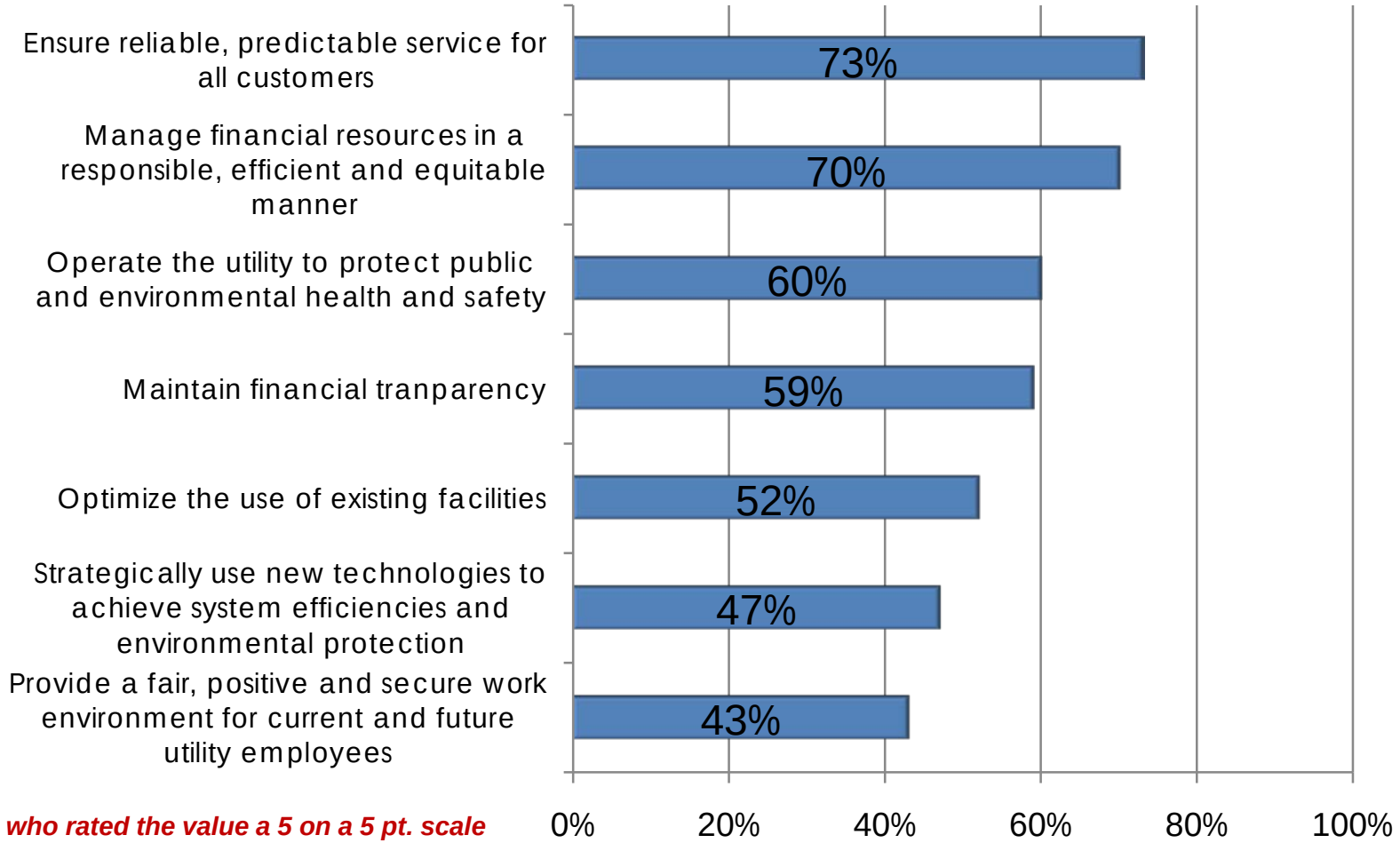
While most values resonated well with survey respondents, some values are clearly more important to them than others. The table below shows the relative ranking of values when only counting votes in the 4 or 5 (high importance) category.

% of respondents choosing 4 or 5 (high) level of importance per value	
Ensure reliable, predictable service for all customers	89%
Manage financial resources in a responsible, efficient, equitable manner	86%
Operate utility to protect public and environmental health and safety	82%
Optimize the use of existing facilities	80%
Maintain financial transparency	79%
Use new technologies to achieve system efficiencies and environmental protection	77%
Provide fair, positive, secure work environment for future utility employees	71%
Ensure capacity to support regional land use and economic development decisions	71%
Invest in capital improvements that create system-wide benefits	67%
Make business management decisions collaboratively with all partners	64%
Demonstrate how decisions optimize system benefits over the long-term	56%
Maintain an adaptable structure to enable expanded partnerships /functions over time	53%
Proactively engage and educate the public in the functions and benefits of the utility	50%
Be a model for inter-local collaboration and cooperation	44%

TOP TIER VALUES

The table below shows the highest-ranking values based on % of “5” votes.

Tell me if the statement has very low or very high importance to you

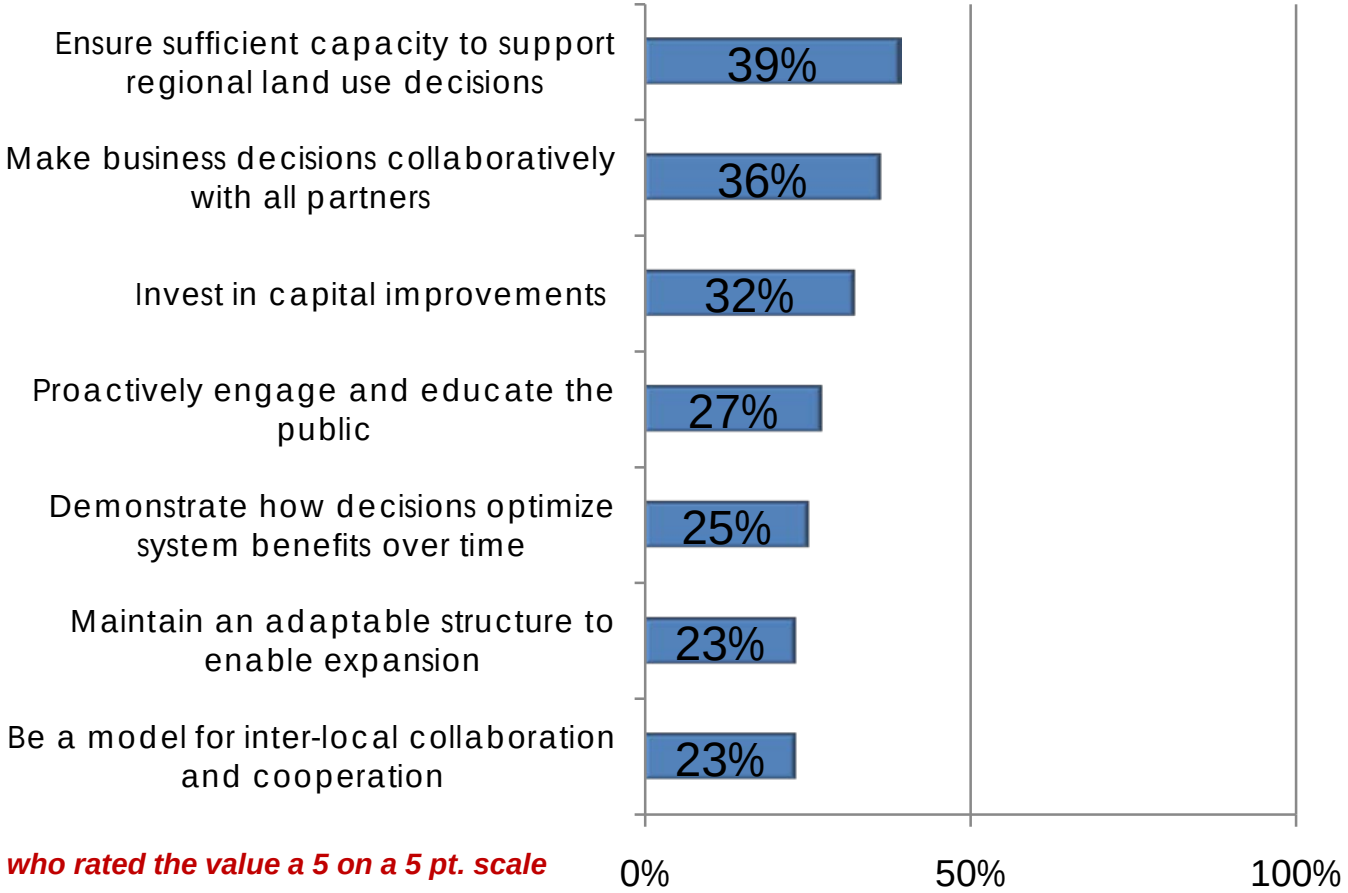


% who rated the value a 5 on a 5 pt. scale

SECOND TIER VALUES

These values did not resonate as strongly because they focused either on agency relationships or future capacity building—both of which are hard concepts for most customers to identify with.

Tell me if the statement has very low or very high importance to you



% who rated the value a 5 on a 5 pt. scale

Key Findings From This Section

Priority Values

- Six values were considered to be highly important (score of 4 or 5) by 80% or more of survey respondents (within margin of error). Highest rated values are as follows:

  1. **Ensure reliable, predictable service for all customers**
  2. **Manage financial resources in a responsible, efficient, equitable manner**
  3. **Operate utility to protect public and environmental health and safety**
  4. **Optimize the use of existing facilities**
  5. **Maintain financial transparency**
  6. **Use new technologies to achieve system efficiencies and environmental protection**

- Tier two values include support for future employee working conditions, economic development capacity, shared decision-making and system-wide benefits.

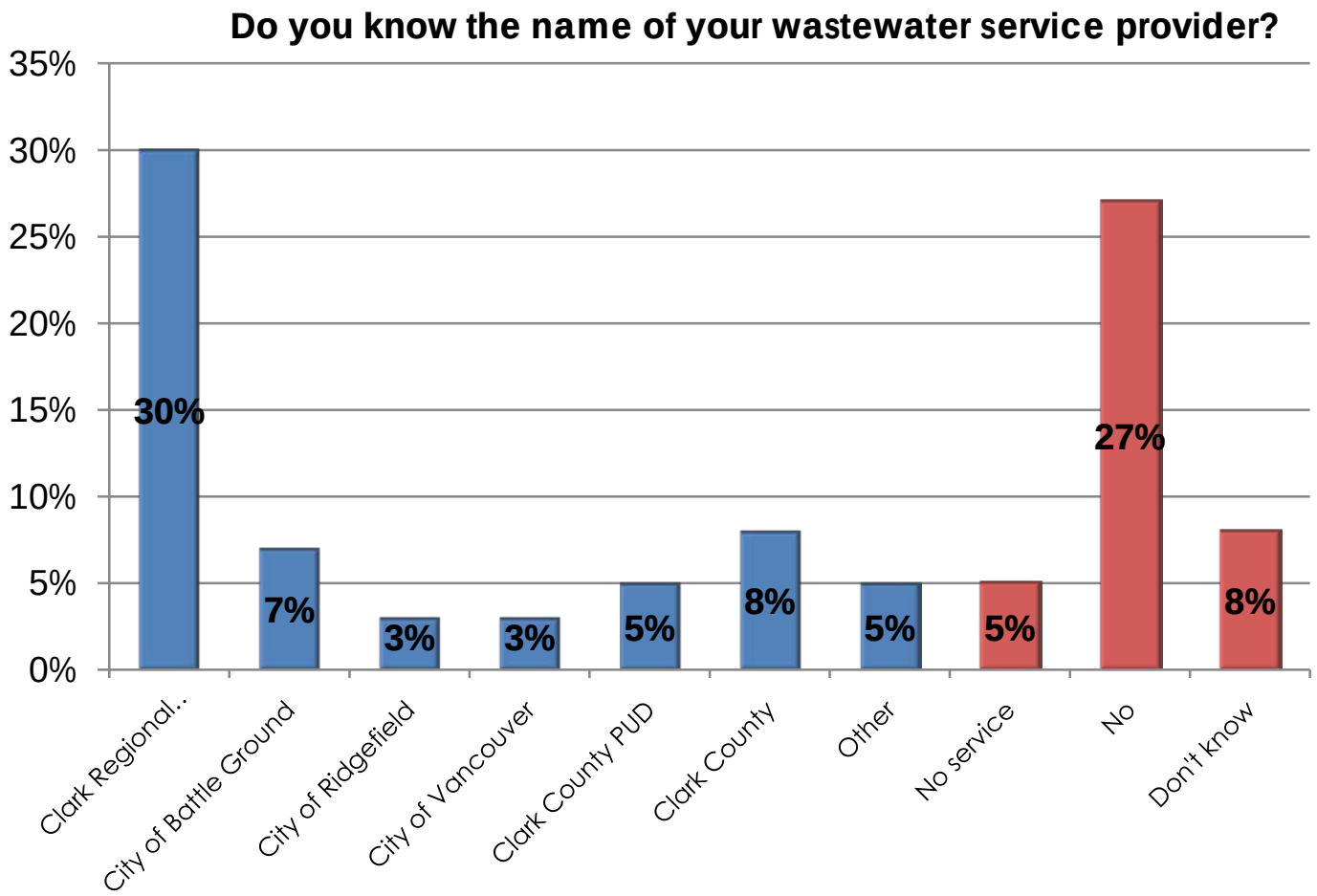
- All but one value (be a model for interlocal cooperation) received a 4 or 5 rating from at least 50% of the sample population.

Awareness & Satisfaction With the Current Model

~ What do customers know about their service providers? Are they satisfied? What do they think of a regional approach?

AWARENESS OF THE LOCAL PROVIDERS

40% of all respondents don't know the name of their wastewater service provider or don't know they have a service provider; another 40% named one of the three local providers by name.



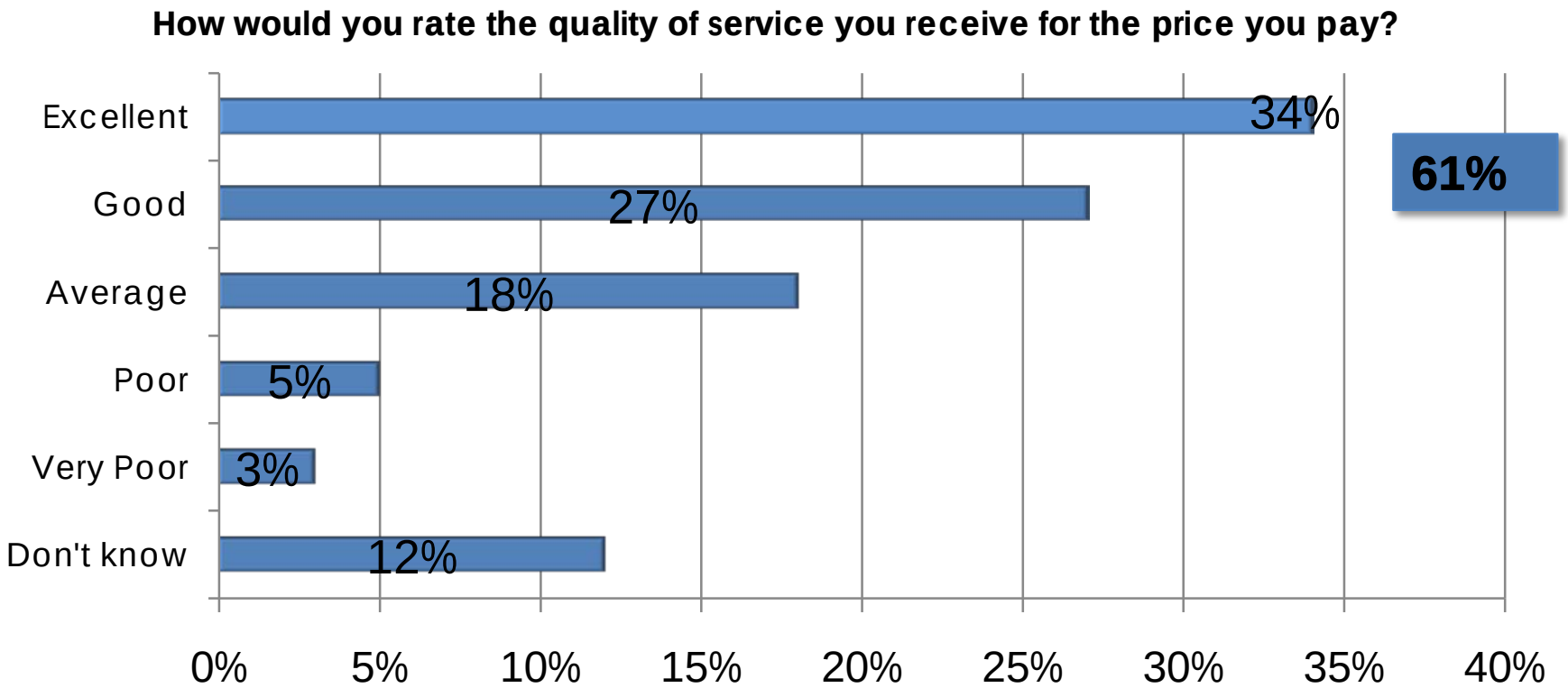
AWARENESS OF THE LOCAL PROVIDERS

Older residents (over 45) and residents of Clark County Wastewater District were least likely to know the name of their service current provider.

	CCWD	Battle Ground Residents	Ridgefield Residents	Men < 45	Men > 45	Women < 45	Women > 45
Clark Regional WD	35%	13%	21%	28%	26%	32%	33%
City of Battle Ground	NA	40%	NA	13%	6%	5%	5%
City of Ridgefield	NA	NA	34%	3%	5%	2%	2%
Other	22%	12%	13%	19%	23%	24%	16%
Don't Know +No+No Service	42%	35%	32%	37%	39%	37%	44%

ATTITUDES TOWARDS CURRENT SERVICE

61% of residents rate their current service as “Good” or “Excellent” relative to price.



ATTITUDES TOWARDS CURRENT SERVICE

Satisfaction with wastewater service is slightly lower among residents in Battleground and Ridgefield than within the central unincorporated rural areas of CCWD.

	Overall	CCWD	Battle Ground	Ridgefield	Men	Women
Excellent+Very Good	62%	65%	56%	45%	59%	64%
Average	18%	14%	27%	32%	18%	17%
Poor+Very Poor	8%	8%	11%	9%	10%	7%
Don't Know	12%	13%	6%	14%	12%	11%

Key Findings From This Section

Awareness and Satisfaction With the Current Model

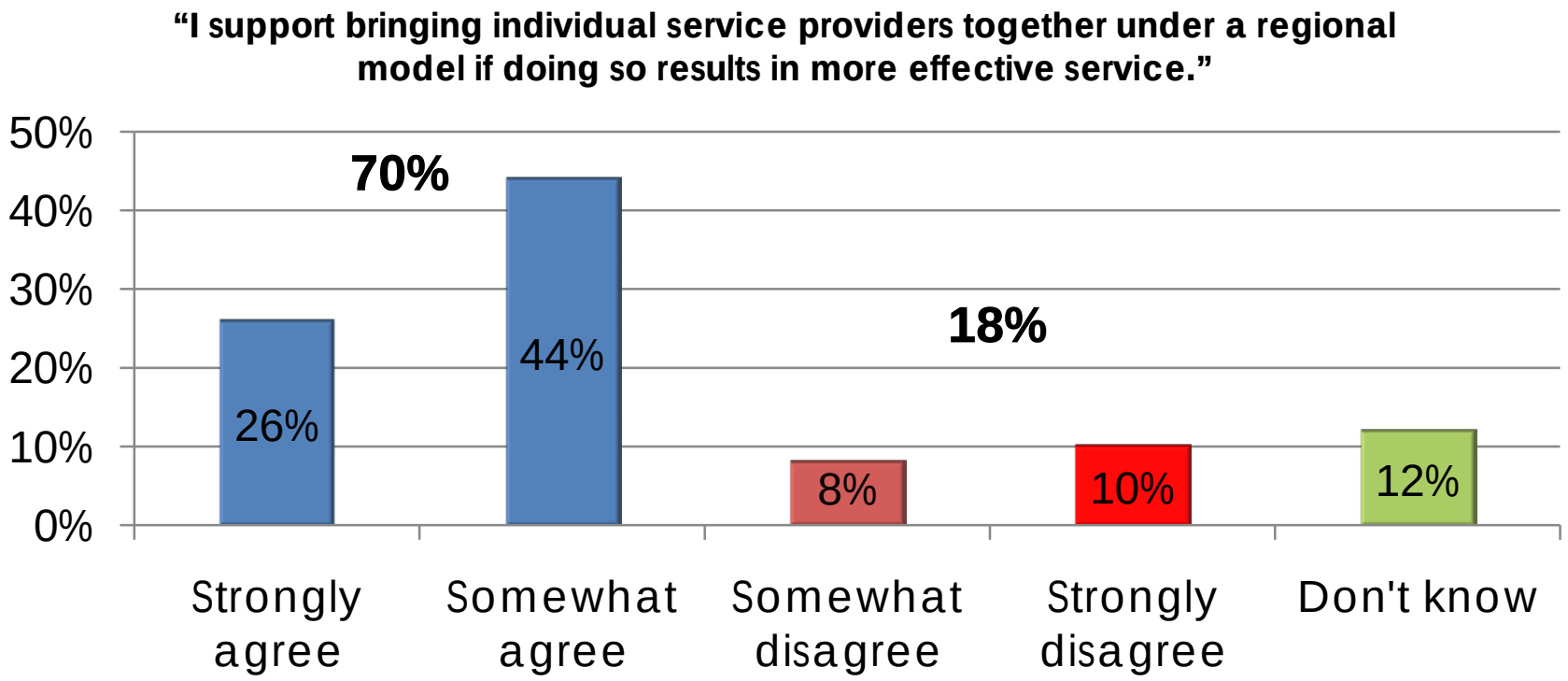
- A combined 40 percent of residents say they don't know the name of their provider, did not give an answer or say they did not have service altogether.
- Satisfaction with wastewater service was good or excellent for over 60 percent of respondents (61%).

Reactions to the Regional Concept

~ What do customers think about a forming a regional wastewater partnership? Do the values we've created resonate with the public?

INITIAL REACTION TO REGIONAL CONCEPT

70% agree with the concept of a regional sewer partnership, but there is only "strong" agreement from 26% while 44% agree with the concept "somewhat."



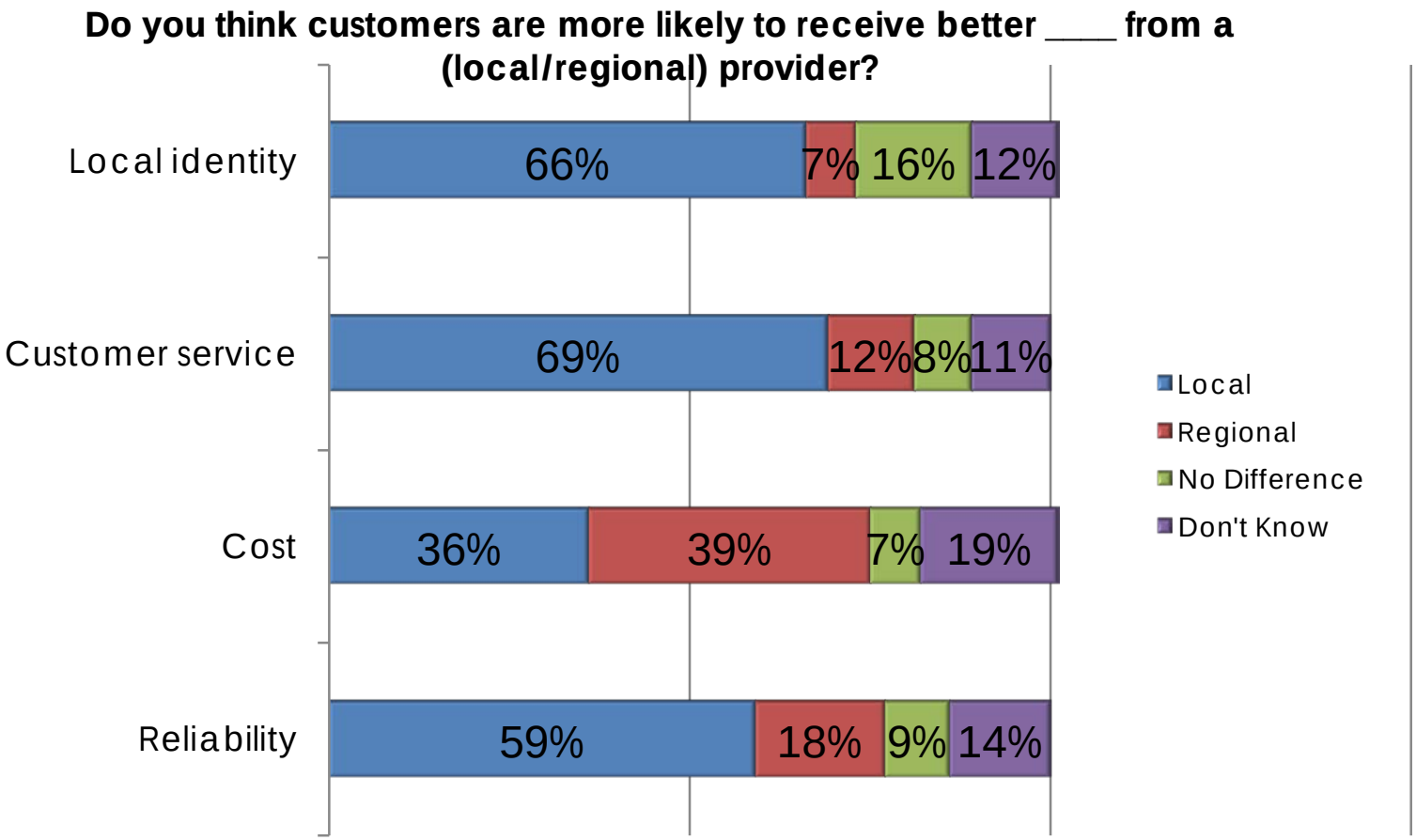
INITIAL REACTION TO REGIONAL CONCEPT

Seniors over 60 are the least likely to agree with a regional approach (20% disagree and 16% are undecided). Younger age cohorts and Battle Ground residents are more enthusiastic than the average (70%).

	CCWD	Battle Ground	Ridgefield	18-34	35-44	45-59	60+
Strongly Agree	25%	25%	30%	23%	26%	25%	28%
Somewhat Agree	43%	49%	40%	51%	47%	48%	36%
TOTAL AGREE	68%	74%	70%	74%	73%	73%	64%
Somewhat Disagree	9%	5%	9%	11%	10%	6%	9%
Strongly Disagree	11%	8%	11%	6%	6%	13%	11%
TOTAL DISAGREE	20%	13%	20%	17%	16%	19%	20%
Don't Know	12%	13%	9%	9%	11%	8%	16%

PERCEPTIONS OF SERVICE DELIVERY

Most customers think a local provider would do a better job delivering customer service, reliable service and a sense of local identity; opinion is split on who could control costs.



PERCEPTIONS OF SERVICE DELIVERY

Women, more affluent households, Ridgefield residents and those willing to pay more for environmental benefits are more likely to see value in the regional approach.

Think Customers will Pay Less Under a Regional Model (39%):

18 to 35 year olds:	55%
Environmental cohort:	47%
High Income households:	45%
High Income women:	45%
Under 45 Women:	43%
$50K to $75k households:	42%

Think a Regional System will be More Reliable (18%):

Environmental cohort:	24%
$50k to $75K households:	24%
City of Ridgefield residents:	23%
High income men:	23%
Customers who think current service is 'poor':	23%

Think Customer Service Will Be Better Under a Regional Model (12%):

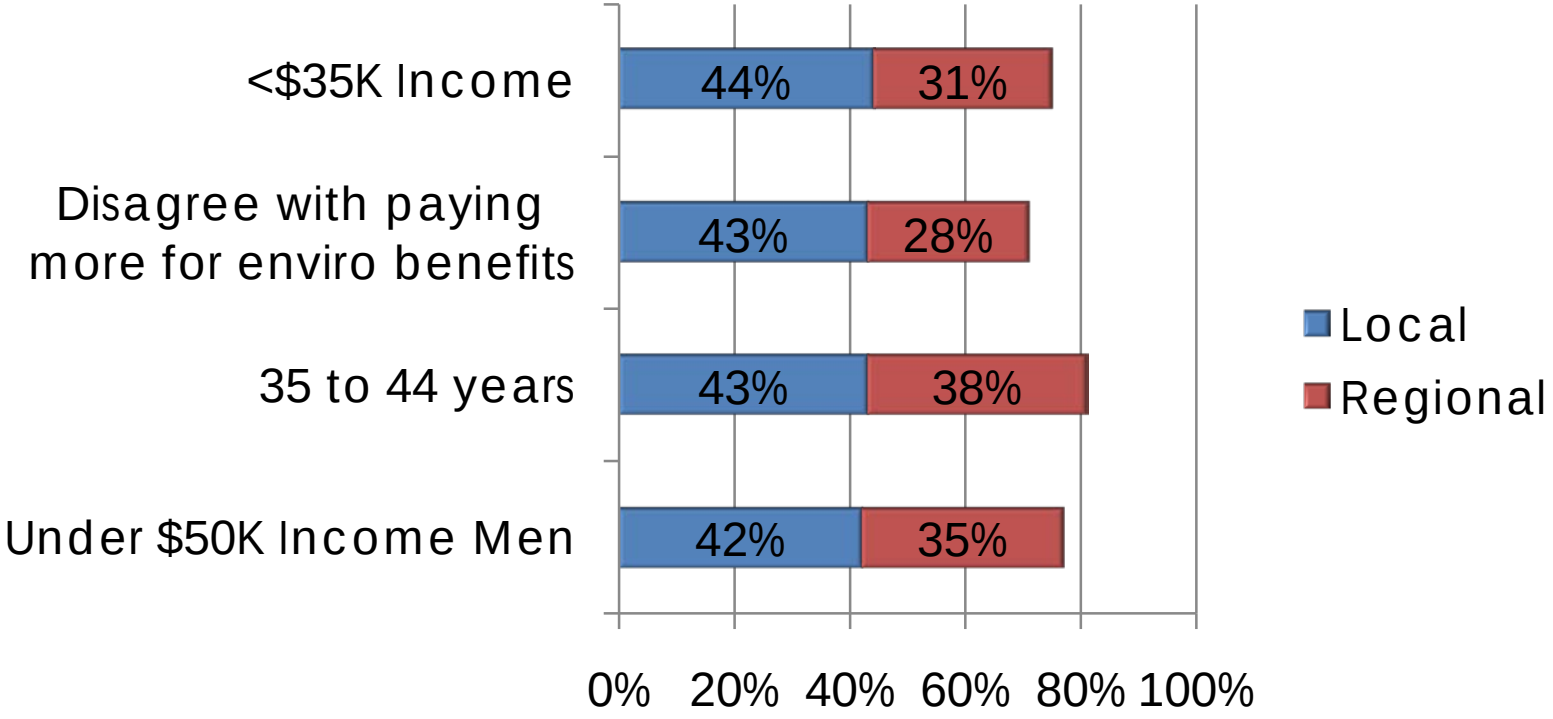
City of Ridgefield:	19%

Think a Regional System will Maintain Local Identity (7%):

High income women:	10%

Perceptions of Service Delivery

While the majority of respondents believe a regional provider could better control customer costs, certain subgroups prefer their local provider.



TOP CONCERNS ABOUT PROPOSAL

Residents of all three areas cite "Cost" as their number one concern about the formation of a regional partnership.

"Which of the things we've been talking about—reliability, cost, customer service, and local identity—concerns you the most about this proposal?"

CCWD
- Cost (55%)
- Reliability (20%)
- Customer Service (11%)
- Local Identity (6%)

Battle Ground
- Cost (59%)
- Reliability (19%)
- Customer Service (8%)
- Local Identity (6%)

Ridgefield
- Cost (60%)
- Reliability (17%)
- Customer Service (11%)
- Local Identity (6%)

TOP CONCERNS ABOUT PROPOSAL

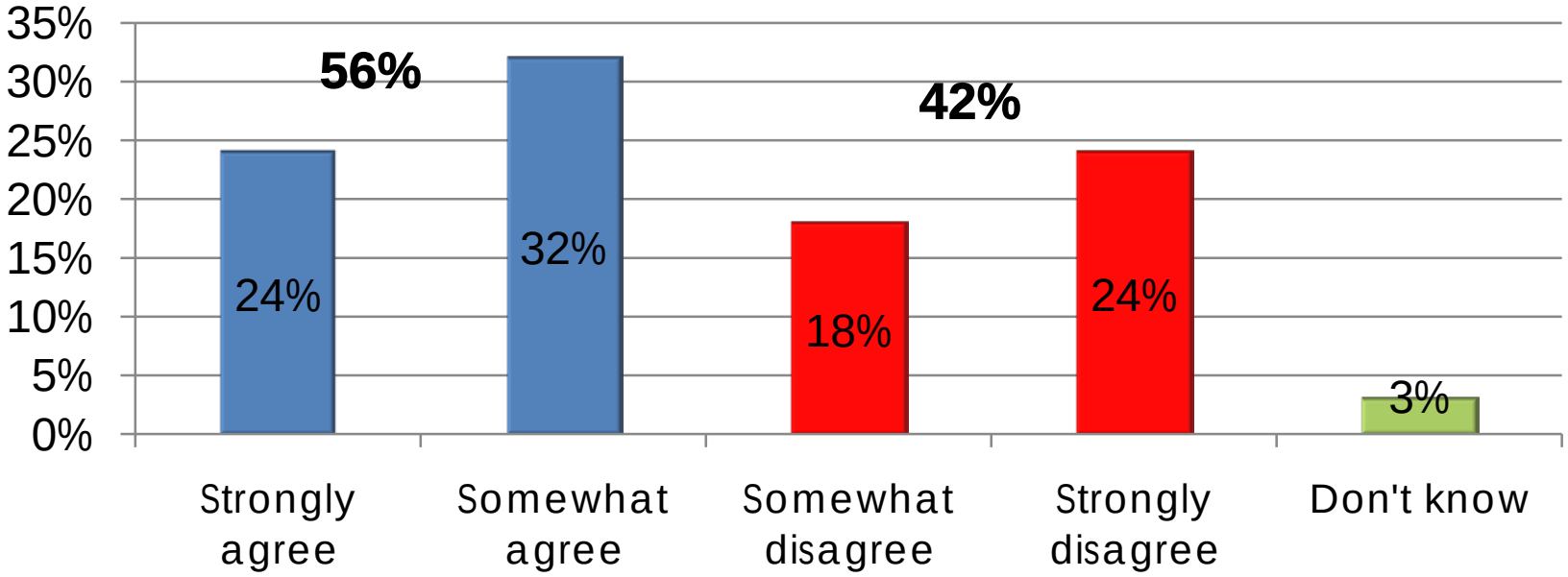
Cost is a top concern for all of the subgroups below, but other factors, such as reliability and customer service play a bigger role for women and those willing to pay more for environmental benefits.

	Overall	Men < 45	Men > 45	Women < 45	Women > 45	Enviro Household
Cost	56%	65%	60%	53%	50%	49%
Reliability	20%	22%	16%	21%	22%	25%
Customer Service	11%	8%	9%	14%	12%	13%
Local Identity	6%	5%	6%	7%	7%	6%
Don't know	8%	0%	9%	6%	9%	7%

ARE CUSTOMERS THINKING GREEN?

A majority of sewer customers say they would pay "a little more" for service if those funds paid for a clearly-identified environmental benefit.

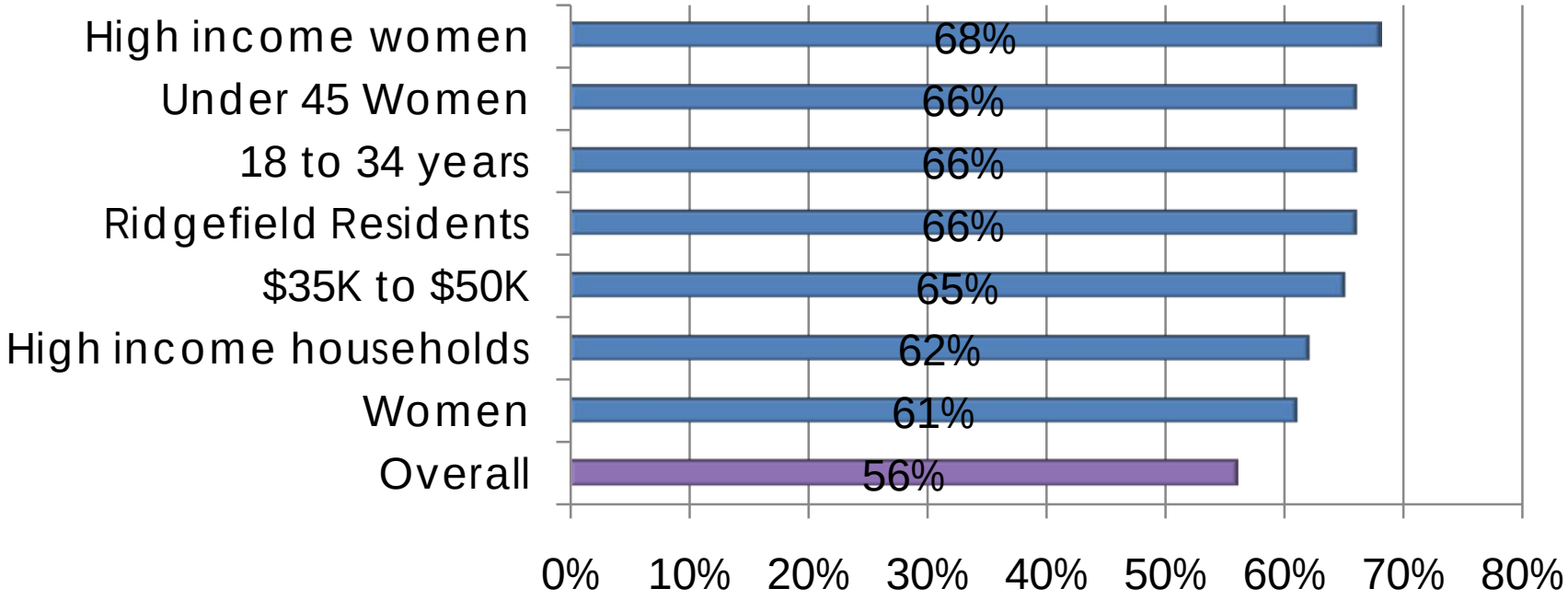
Do you agree or disagree with this statement: "I am willing to pay a little more for sewer service if there is a clearly-identified environmental benefit, such as efforts to reduce odor and pollutant discharges and opportunities to use recycled water."



ARE CUSTOMERS THINKING GREEN?

Women's subgroups, Ridgefield residents and customers under 35 were the most likely to indicate a willingness to pay more if their utility offered an opportunity to reduce odors or environmental pollutants.

"I am willing to pay a little more for sewer service if there is a clearly identified environmental benefit"



% who agree they would pay more for sewer service if there was an environmental benefit

ARE CUSTOMERS THINKING GREEN?

The regional partnership could possibly attract more support for environmental programs by appealing to the concerns of younger men and moderate income households

Willing to Pay More

- Women
- High Income
- Ridgefield Residents

"Mushy Middle"

- Men Under 45
- $35K to $50K household income

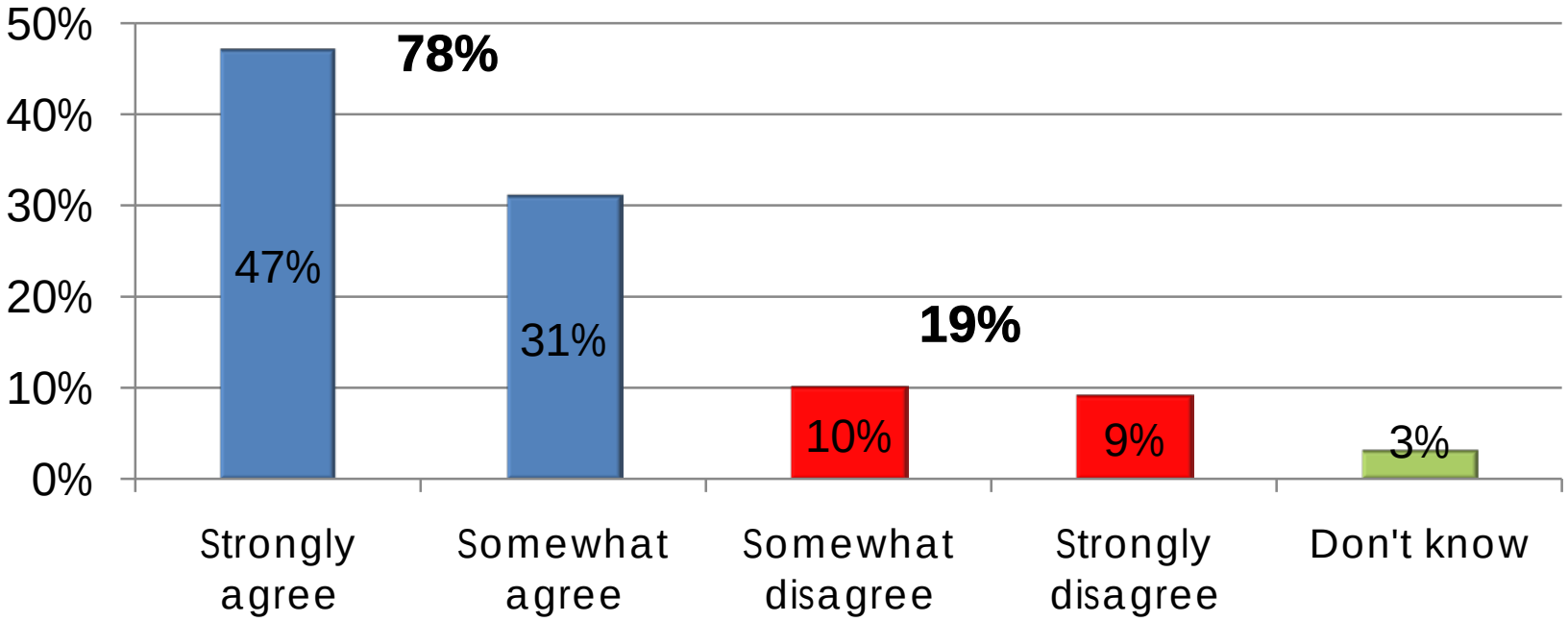
Unwilling to Pay More

- Men, especially Men Over 45
- Under $35K household income
- Battle Ground residents

ARE CUSTOMERS THINKING GREEN?

When the statement removes the language about cost increases, agreement shoots up over 20 percentage points.

Do you agree or disagree with this statement: "Environmental protection for our community means doing more than just meeting regulatory minimums."



ARE CUSTOMERS THINKING GREEN?

The difference in attitude among the overall sample and each demographic group shows how strong the suggestion of a price increase can be in tough economic times.

	Overall	Men <45	Men > 45	Women < 45	Women > 45
Agreed with Q10A	56%	58%	48%	66%	61%
Agreed with Q10B	78%	74%	73%	89%	80%
Difference	-22% pts.	-16% pts.	-25% pts.	-23% pts.	-19% pts.

Key Findings From This Section:

Reactions to the Regional Proposal

- Many ratepayers just want their service provider to deliver a reliable, safe, healthy product at a fair price. But in tough economic times, prices become even more important. This finding is apparent at several different places throughout the survey.

- Most people believe local providers would do better delivering on customer service, reliability and maintaining local identity. On price, opinion is split with 36 percent saying local providers can do the best job, 39 percent saying a regional approach gives the customer the best price and 19 percent undecided. Younger people and more affluent customers were the most likely to believe a regional approach would help contain costs.

- Controlling costs during the transition to a regional partnership were important to every subgroup we interviewed, but they stood out as being particularly important to men, lower income households and customers who do not agree with paying more in sewer service to receive any environmental benefits.

- Differences between answers on the environmental statements are stark. 78% of customers want to "do more than the minimum" to protect the environment, but only 56% are willing to pay a little more for that service.

- Seniors over 60 are undecided more than opposed to a regional sewer partnership. The don't know who would be better at delivering the most effective wastewater service, and will need clear evidence to reach a conclusion.

- Customer service and reliability increase in importance for an important demographic – women.