



REPORT ON THE
2006 RESIDENT AND BUSINESS SATISFACTION STUDY

DESIGNED AND CONDUCTED FOR THE
CITY OF LAKE FOREST

FEBRUARY 6, 2007

True North
RESEARCH

741 GARDEN VIEW COURT SUITE 208
ENCINITAS, CALIFORNIA 92024
PHONE 760.632.9900 FAX 760.632.9993
WEB WWW.TN-RESEARCH.COM



TABLE OF CONTENTS

Table of Contents	i
List of Tables	iv
List of Figures	v
Introduction	1
Purpose of Study	1
Overview of Methodology.....	2
Statistical Significance	2
Organization of Report.....	2
Acknowledgements	2
Disclaimer	2
About True North.....	2
Just the Facts	4
General Perceptions of City & Local Issues	4
Overall Satisfaction.....	5
Specific Services: Resident Survey.....	5
Specific Services: Business Survey.....	6
Neighborhood Issues	6
Redevelopment of El Toro	6
Communication	7
City Websites	7
Future Business Needs	8
Conclusions	9
General Perceptions of City & Local Issues	12
Local Issues	12
Question 2: Resident Survey	12
Question 2: Business Survey	14
Quality of Life.....	15
Question 3: Resident Survey	15
Business Climate	16
Question 3: Business Survey	17
What Do You Value Most about Lake Forest?	18
Question 4: Resident Survey	18
Question 4: Business Survey	19
Overall Satisfaction	20
Overall Performance Rating	20
Question 5: Resident Survey	20
Question 5: Business Survey	22
What I Want Most.....	23
Question 6: Resident Survey	24
Question 6: Business Survey	25
Specific Services: Resident Survey	26
Police Services	26
Question 7: Resident Survey	26
Question 8: Resident Survey	27
Development Services Department.....	28
Question 9: Resident Survey	28
Question 10: Resident Survey	29
Question 11: Resident Survey	30
Public Works Department	31
Question 12: Resident Survey	31
Question 13: Resident Survey	32
Community Services Department	33

Question 14: Resident Survey	33
Question 15: Resident Survey	34
Specific Services: Business Survey	36
Question 7: Business Survey	36
Question 8: Business Survey	37
Question 9: Business Survey	38
Question 10: Business Survey	39
Performance Needs & Priorities	41
Neighborhood Issues	44
Question 16: Resident Survey	44
Question 11: Business Survey	45
Code Enforcement	45
Question 17: Resident Survey	45
Question 12: Business Survey	46
Question 18: Resident Survey	47
Question 13: Business Survey	47
Street Sweeping	47
Question 19: Resident Survey	48
Question 14: Business Survey	48
Redevelopment of El Toro	49
Have you Visited the New Shopping Centers?	49
Question 20: Resident Survey	49
Question 15: Business Survey	50
Appearance	50
Question 21: Resident Survey	51
Question 16: Business Survey	52
Role of City and Redevelopment Agency	53
Question 22: Resident Survey	53
Question 17: Business Survey	54
Communication	56
Satisfaction with Communication Efforts	56
Question 23: Resident Survey	56
Question 18: Business Survey	58
Information Sources	59
Question 24: Resident Survey	60
Question 19: Business Survey	60
Online Features and Services	61
Question 25: Resident Survey	61
Question 20: Business Survey	62
City Websites	64
Use of Websites	64
Question D4: Resident Survey	64
Question D4: Business Survey	66
Website Content	66
Question D5: Resident Survey	66
Question D5: Business Survey	68
Future Business Needs	69
Growth	69
Question D6: Business Survey	69
Require Additional Space?	69
Question D7: Business Survey	70
Relocation	70
Question D8: Business Survey	70
Question D9: Business Survey	71

Background & Demographics 72

Methodology 74

 Questionnaire Development 74

 CATI & Pre-Test 74

 Sample 74

 Margin of Error 75

 Data Collection 76

 Data Processing 77

 Rounding 77

Questionnaires & Toplines 78

 Resident Survey 78

 Business Survey 92



LIST OF TABLES

Table 1	Top Five Issues Facing Residents (2006 ~ 2000)	13
Table 2	Top Five Issues Facing Business Community (2006 ~ 2000)	14
Table 3	Want From Lake Forest in Next Two Years: Resident Survey (2006 ~ 2004)	24
Table 4	Want From Lake Forest in Next Two Years: Business Survey (2006 ~ 2004)	25
Table 5	Importance of Police Services: Resident Survey (2006 ~ 2004)	27
Table 6	Satisfaction With Police Services: Resident Survey (2006 ~ 2004)	28
Table 7	Importance of Development Services: Resident Survey (2006 ~ 2004)	29
Table 8	Satisfaction With Development Services: Resident Survey (2006 ~ 2004)	29
Table 9	Satisfaction With Development Services: Resident Survey by Interacted With Development Services Department in Past Year	30
Table 10	Importance of Public Works Services: Resident Survey (2006 ~ 2004)	32
Table 11	Satisfaction With Public Works Services: Resident Survey (2006 ~ 2004)	33
Table 12	Importance of Community Services: Resident Survey (2006 ~ 2004)	34
Table 13	Satisfaction With Community Services: Resident Survey (2006 ~ 2004)	35
Table 14	Importance of Select Services I: Business Survey (2006 ~ 2004)	37
Table 15	Satisfaction With Select Services I: Business Survey (2006 ~ 2004)	38
Table 16	Importance of Select Services II: Business Survey (2006 ~ 2004)	39
Table 17	Satisfaction With Select Services II: Business Survey (2006 ~ 2004)	40
Table 18	Needs & Priority Matrix	42
Table 19	Sample Demographics: Resident Survey (2006 ~ 2002)	72
Table 20	Sample Demographics: Business Survey (2006 ~ 2000)	73



LIST OF FIGURES

Figure 1	Most Important Issues Facing Residents	12
Figure 2	Most Important Issues Facing Business Community	14
Figure 3	Overall Quality of Life (2006 ~ 2004)	15
Figure 4	Overall Quality of Life by Years in Lake Forest Area, Child in Home & Household Income	16
Figure 5	Overall Quality of Life by Years in Gender, Age & Home Ownership Status	16
Figure 6	Quality of Business Climate (2006 ~ 2004)	17
Figure 7	Quality of Business Climate by Number of Employees, Resident of Lake Forest & Gender	17
Figure 8	Quality of Business Climate by Years Operating Business in Lake Forest & Business Category	18
Figure 9	Value Most About Living In Lake Forest	18
Figure 10	Feature or Aspect of Lake Forest That is Beneficial to Business	19
Figure 11	Overall Satisfaction: Resident Survey (2006 ~ 2000)	20
Figure 12	Overall Satisfaction: Resident Survey by Years in Lake Forest Area, Child in Home & Household Income	21
Figure 13	Overall Satisfaction: Resident Survey by Gender, Age & Home Ownership Status	21
Figure 14	Overall Satisfaction: Business Survey (2006 ~ 2000)	22
Figure 15	Overall Satisfaction: Business Survey by Number of Employees, Visited City Website & Resident of Lake Forest	22
Figure 16	Overall Satisfaction: Business Survey by Gender, Years Operating Business in Lake Forest & Business Category	23
Figure 17	Want From Lake Forest in Next Two Years: Resident Survey	24
Figure 18	Want From Lake Forest in Next Two Years: Business Survey	25
Figure 19	Importance of Police Services: Resident Survey	26
Figure 20	Satisfaction With Police Services: Resident Survey	27
Figure 21	Importance of Development Services: Resident Survey	28
Figure 22	Satisfaction With Development Services: Resident Survey	29
Figure 23	Interacted With Development Services Department in Past Year: Resident Survey	30
Figure 24	Interacted With Development Services Department in Past Year: Resident Survey by Household Income & Home Ownership Status	31
Figure 25	Importance of Public Works Services: Resident Survey	31
Figure 26	Satisfaction With Public Works Services: Resident Survey	32
Figure 27	Importance of Community Services: Resident Survey	33
Figure 28	Satisfaction With Community Services: Resident Survey	34
Figure 29	Importance of Select Services I: Business Survey	36
Figure 30	Satisfaction With Select Services I: Business Survey	37
Figure 31	Importance of Select Services II: Business Survey	38
Figure 32	Satisfaction With Select Services II: Business Survey	39
Figure 33	Service Needs: Resident Survey	43
Figure 34	Service Needs: Business Survey	43
Figure 35	Rating Local Issues: Resident Survey	44
Figure 36	Rating Local Issues: Business Survey	45
Figure 37	Satisfaction With Code Enforcement: Resident Survey	45
Figure 38	Satisfaction with Code Enforcement: Resident Survey by Years in Lake Forest Area & Household Income	46
Figure 39	Satisfaction With Code Enforcement: Business Survey	46
Figure 40	Satisfaction With Code Enforcement: Business Survey by Resident of Lake Forest, Years Operating Business in Lake Forest & Business Category	47
Figure 41	Street Sweeping Problems: Resident Survey	48
Figure 42	Street Sweeping Problems: Business Survey	48

Figure 43	Driven Past or Visited New Shopping Centers in Past Three Months: Resident Survey.	49
Figure 44	Driven Past or Visited New Shopping Centers in Past Three Months: Resident Survey by Household Income & Age	50
Figure 45	Driven Past or Visited New Shopping Centers in Past Three Months: Business Survey.	50
Figure 46	Rating Appearance of New Shopping Centers: Resident Survey	51
Figure 47	Rating Appearance of New Shopping Centers: Resident Survey by Years in Lake Forest Area, Employment Status & Gender	51
Figure 48	Rating Appearance of New Shopping Centers: Resident Survey by Household Income & Age	52
Figure 49	Rating Appearance of New Shopping Centers: Business Survey	52
Figure 50	Rating Appearance of New Shopping Centers: Business Survey by Resident of Lake Forest, Gender, Years Operating Business in Lake Forest & Business Category.	53
Figure 51	Feel Redevelopment Agency Should Play Role in Revitalizing Areas of City: Resident Survey	53
Figure 52	Feel Redevelopment Agency Should Play Role in Revitalizing Areas of City: Resident Survey by Household Income & Age	54
Figure 53	Feel Redevelopment Agency Should Play Role in Revitalizing Areas of City: Business Survey	54
Figure 54	Feel Redevelopment Agency Should Play Role in Revitalizing Areas of City: Business Survey by Number of Employees, Resident of Lake Forest & Gender	55
Figure 55	Feel Redevelopment Agency Should Play Role in Revitalizing Areas of City: Business Survey by Years Operating Business in Lake Forest & Business Category.	55
Figure 56	Satisfaction With Communication: Resident Survey (2006 ~ 2000).	56
Figure 57	Satisfaction With Communication: Resident Satisfaction by Years in Lake Forest Area, Child in Home & Household Income	57
Figure 58	Satisfaction With Communication: Resident Satisfaction by Gender, Age & Home Ownership Status	57
Figure 59	Satisfaction With Communication: Business Survey (2006 ~ 2000).	58
Figure 60	Satisfaction With Communication: Business Survey by Number of Employees, Resident of Lake Forest & Gender	58
Figure 61	Satisfaction With Communication: Business Survey by Years Operating Business in Lake Forest & Business Category.	59
Figure 62	Information Sources: Resident Survey (2006 ~ 2004)	60
Figure 63	Information Sources: Business Survey (2006 ~ 2004)	60
Figure 64	Use of Proposed Online Services: Resident Survey.	61
Figure 65	Use of Proposed Online Services: Resident Survey by Age	62
Figure 66	Use of Proposed Online Services: Business Survey.	62
Figure 67	Use of Proposed Online Services: Business Survey by Visited City Website in Past Year.	63
Figure 68	Visited City Website in Past Year: Resident Survey (2006 ~ 2000)	64
Figure 69	Visited City Website in Past Year: Resident Survey by Years in Lake Forest, Employment Status, Child in Home & Live in HOA	65
Figure 70	Visited City Website in Past Year: Resident Survey by Household Income & Age.	65
Figure 71	Visited City Website in Past Year: Business Survey (2006 ~ 2000)	66
Figure 72	Satisfaction With City Website: Resident Survey (2006 ~ 2002)	66
Figure 73	Satisfaction With City Website: Resident Survey by Years in Lake Forest, Child in Home & Household Income.	67
Figure 74	Satisfaction With City Website: Resident Survey by Gender, Age & Home Ownership Status	67
Figure 75	Satisfaction With City Website: Business Survey (2006 ~ 2002)	68

Figure 76 Projected Business Size in Next 12 Months (2006 ~ 2000) 69
 Figure 77 Projected Need for Additional Square Footage. 70
 Figure 78 Planning Relocation in Next 12 Months (2006 ~ 2000) 70
 Figure 79 Relocation Destination 71
 Figure 80 Maximum Margin of Error 76



INTRODUCTION

Located in the heart of South Orange County and the beautiful Saddleback Valley, the City of Lake Forest has been carefully master-planned to help ensure that it will always be an ideal place for business to prosper and for people to live, work and play. Incorporated in 1991, the City's team of full-time and part-time employees provides a full suite of services through 10 Departments—City Attorney, City Clerk, City Manager, Community Services, Development Services, Finance, Management Services, Police Services, Public Works, and Redevelopment/Economic Development.

As part of its commitment to provide high quality services that meet the varied needs of its residents and local businesses, the City of Lake Forest engages both residents and businesses on a daily basis and receives constant feedback regarding its performance. Although these informal feedback mechanisms are a valuable source of information for the City in that they provide timely and accurate information about the opinions of its constituents and customers, they do not necessarily provide an accurate picture of the community as a whole. For the most part, informal feedback mechanisms rely on the customer to initiate the feedback, which creates a self-selection bias. The City receives feedback only from those individuals who are motivated enough to initiate the feedback process. Because these individuals tend to be those who are either very pleased or very displeased with the service they have received, their collective opinions are not necessarily representative of the City's resident and business populations as a whole.

PURPOSE OF STUDY The motivation for the current study was to design and employ a methodology that would avoid the self-selection bias noted above and thereby provide the City with a statistically reliable understanding of the community's satisfaction, priorities and concerns as they relate to services and facilities provided by the City of Lake Forest. Ultimately, the survey results and analyses presented in this report will provide Council and staff with information that can be used to make sound, strategic decisions in a variety of areas, including service improvements and enhancements, measuring and tracking internal performance, budgeting, policy-making, and planning.

To assist it in this effort, the City selected True North Research to design the research plan and conduct the study. Broadly defined, the study was designed to:

- Identify key issues of concern for residents and businesses.
- Measure overall satisfaction with the City's efforts to provide municipal services.
- Measure the importance of *specific* services to residents and businesses, as well as their satisfaction with the City's efforts to provide each service.
- Determine the effectiveness of the City's communication efforts.
- Gather data on policy-related matters.
- Collect additional background and demographic data that is relevant to understanding the perceptions, needs and interests of residents and businesses.

It should be noted that this is not the first statistically reliable resident and business ‘satisfaction’ study conducted for the City. Similar studies were conducted in 1998, 2000, 2002, and 2004. Because there is a natural interest in tracking the City’s performance in meeting the evolving needs of its residents and businesses, where appropriate the results of the current study are compared with the results of identical questions used in the 2000, 2002, and 2004 surveys.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 74). In brief, a total of 400 randomly selected Lake Forest residents who are registered to vote participated in the resident survey between October 6 and October 16, 2006. The resident interviews averaged 20 minutes in length. A 15-minute survey of business managers was administered to a stratified random sample of 200 local business owners and managers between November 1 and November 7, 2006.

STATISTICAL SIGNIFICANCE As noted above, many of the figures and tables in this report present the results of questions asked in 2006 alongside the results found in previous surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in public opinion during this period—as opposed to being due to chance associated with selecting two samples independently and at random. Differences between the two studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in public opinion between the two studies. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the surveys by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaires used for the interviews are contained at the back of this report and a complete set of crosstabulations for the resident and business survey results are contained in Appendix A and Appendix B, respectively.

ACKNOWLEDGEMENTS True North would like to thank the staff at the City of Lake Forest who contributed their valuable input during the design stage of this study. Their collective experience and insight improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of the City of Lake Forest. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities and concerns of their residents and customers. Through designing and implementing scientific sur-

veys, focus groups and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective public information campaigns.

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 400 survey research studies for public agencies—including more than 250 studies for California municipalities and special districts.



JUST THE FACTS

The following is an outline of the main factual findings from the 2006 survey. For the reader's convenience, the findings are organized according to the section titles used in the body of this report. Thus, to learn more about a particular finding and how it may compare to findings from prior surveys (where applicable), simply turn to the appropriate report section.

GENERAL PERCEPTIONS OF CITY & LOCAL ISSUES

- Nearly one-quarter (24%) of residents cited traffic congestion as the most important issue in Lake Forest, followed by crime/public safety issues (12%), immigration/day laborer issues (9%),¹ and the availability/cost of housing (8%). Nearly one quarter (24%) of respondents did not perceive (or were unable to offer) a specific issue or problem facing residents in Lake Forest.
- When local businesses were asked to state the most important issue facing the business community in Lake Forest, the most common response was that they were not sure or there were no important issues facing the business community in Lake Forest (49%). Among the specific issues mentioned, traffic congestion and its impact on customers' ability to access local businesses was the most frequently cited issue (16%), followed by taxes/fees (5%), competition from other businesses (4%), and the affordability/availability of commercial space in the City (4%).
- The vast majority of residents shared very favorable opinions of the quality of life in Lake Forest, with 46% reporting it is excellent, 49% good, and only 4% saying it is fair. Less than 1% of residents indicated that the quality of life in Lake Forest is poor or very poor.
- When businesses were asked to rate the business climate in Lake Forest when compared to that in surrounding areas, 25% reported that it is excellent, 54% stated it is good, and 16% offered that it is fair. Just 2% of businesses indicated that, when compared to neighboring areas, the business climate in the City of Lake Forest is either poor or very poor.
- The safety of the community/low crime rate was the most valued aspect of living in Lake Forest for residents, being mentioned by 21% of respondents. The sense of community/friendly people (15%), the peace and quiet (9%), the weather (5%), and the quality of local schools (5%) were also commonly cited as things residents value about living in Lake Forest.
- When asked if there is a particular aspect of Lake Forest that benefits their business, the most common response was either no (27%) or that there may be, but they could not think of one at the time of the interview (14%). Among the specifics aspects that were mentioned, proximity to freeways and surrounding areas of interest (12%), the location of the City in general (11%), the quality/image of the City and local community (9%), and the number/quality of local businesses and retailers (6%) were cited most often.

1. The introduction of the immigration/day laborer issue in 2006 is undoubtedly a reflection of the recent politicization of this issue in state and national politics. Immigration was arguably the most salient domestic issue in both state and national politics during the general election cycle. Because the resident survey was conducted during the prime campaign season, the saliency of the immigration issue in response to this question was higher than it would have been otherwise. It is worth noting, moreover, that True North encountered a similar pattern in another southern California city that conducted their resident survey during the 2006 general election campaign season.

OVERALL SATISFACTION

- An overwhelming majority of residents (91%) and businesses (87%) stated that—overall—they were satisfied with the City’s efforts to provide municipal services.
- When asked in an open-ended manner to indicate what they most want the City to accomplish during the next two years the most common response to this question was ‘not sure’ or ‘nothing’. Reducing traffic and improving traffic flow was the most frequently mentioned improvement sought by residents (11%), followed by increasing crime prevention and public safety (9%), limiting growth (7%), and road improvements (7%).
- Although businesses also mentioned a desire for reduced traffic (9%), they differed with residents in their stated desire for continued growth and the need for more commercial and industrial space (11%). Businesses also mentioned improving support of the local business community (7%), redeveloping/beautifying/landscaping the City (7%), improving public safety (4%), and completing construction projects in a timely manner (4%).

SPECIFIC SERVICES: RESIDENT SURVEY

- Among the services provided by **Police Services**, residents rated maintaining a low crime rate as the most important service, followed by investigating criminal activity and preparing for emergencies. Residents were most satisfied with the Department’s efforts to provide crossing guards near schools, maintain a low crime rate, and provide child safety programs.
- Among the services provided by the **Development Services Department**, residents rated inspecting buildings as the most important service, followed by issuing building permits, and enforcing zoning regulations. Residents were similarly satisfied with the Department’s efforts to provide all five services tested in the survey.
- Of the residents surveyed, just 11% had applied for a building permit, received a building inspection, requested code enforcement, or used any other service offered by the Development Services Department in the 12 months prior to the survey.
- Among the services provided by the **Public Works Department**, residents rated maintaining local streets and roads as the most important, followed by reducing traffic congestion, and providing garbage and recycling services. Residents were most satisfied with the Department’s efforts to maintain parks and picnic areas, provide street sweeping services, and maintain public landscapes.
- Among the services provided by the **Community Services Department**, residents rated providing recreation and sports programs for teens as the most important, followed by providing recreation and sports programs for elementary school-aged children, and providing special events. Residents were most satisfied with the Department’s efforts to provide special events, followed by recreation and sports programs for elementary school-aged children, and recreation programs for pre-schoolers.

SPECIFIC SERVICES: BUSINESS SURVEY

- Among the **general city services** provided by the City to local businesses, participants in the business survey rated maintaining a low crime rate as the most important, followed by investigating criminal activity and promoting economic development. Of this list of services, the business community was most satisfied with the City's efforts to maintain a low crime rate, provide building permit services, and provide building inspection services.
- Among the **infrastructure-related services** provided by the City to local businesses, business professionals rated maintaining local streets and roads as most important, followed by reducing traffic congestion, and street sweeping. Of this list of services, the business community was most satisfied with the City's efforts to provide street sweeping, landscape medians and other public areas, and enforce architectural standards.

NEIGHBORHOOD ISSUES

- The most commonly perceived neighborhood problem among those tested for residents and the business community was speeding vehicles, being mentioned by more than half of residents (51%) and one-third of businesses (36%) as at least a moderate problem.
- Among residents, recreation vehicles parked on the street for more than 72 hours at a time (26%) and excessive noise (25%) rounded-out the top three most prevalent problems.
- For the business community, landscapes not being properly maintained (19%), graffiti (15%), abandoned vehicles (17%) and excessive noise (18%) had similar percentages of respondents indicating that these issues were at least moderate problems in their area.
- Among residents, 27% did not have an opinion regarding the City's code enforcement efforts. Of those with an opinion, approximately 11% were dissatisfied with City's efforts in this respect, whereas the remaining respondents were either very (33%) or somewhat (30%) satisfied with the City's code enforcement efforts.
- Just over one-third (36%) of Lake Forest business professionals also indicated that they did not have an opinion regarding the City's code enforcement efforts. Among those with an opinion, however, the tone was decidedly positive. Fifty-six percent (56%) of respondents indicated that they were satisfied, whereas less than 9% stated that they were dissatisfied.
- Thirty-nine percent (39%) of residents and 16% of businesses reported that parked cars on their street tend to prevent street sweepers from adequately cleaning the street.

REDEVELOPMENT OF EL TORO

- The vast majority of residents (86%) and business professionals (72%) reported that they had visited or driven by the new Orchard and Home Depot Shopping Centers along El Toro Road in the three months prior to the interview.
- Residents provided very positive assessments of the appearance of the new shopping centers, with more than half (51%) rating it as excellent and an additional one-third (33%) rating it as good. Just 6% responded with fair, and less than 5% used poor or very poor to describe the appearance of the new centers.

- Local business professionals were similarly enthusiastic about the appearance of the new shopping centers along El Toro Road, with 51% describing it as excellent and 36% rating it as good. Just 6% responded with fair, and less than 4% used poor or very poor to describe the appearance of the new centers.
- Overall, 85% of residents and 87% of businesses supported the City's and the Lake Forest Redevelopment Agency's continued involvement in redeveloping and revitalizing outdated commercial areas in the City.

COMMUNICATION

- Overall, 81% of residents indicated that they were either very (48%) or somewhat (33%) satisfied with the City's efforts to communicate with them through newsletters, the Internet, and other means.
- Overall, 73% of local businesses indicated that they were either very (32%) or somewhat (41%) satisfied with the City's efforts to communicate with them through newsletters, the Internet, and other means.
- The most frequently cited source of information for City news among residents in 2006 was the City's newsletter, mentioned by name (*The Leaflet*) by 41% of respondents and referred to in general (the City's newsletter) by an additional 11% of residents. Other sources that were mentioned by at least 10% of residents included the *Saddleback Valley News* (17%), *Orange County Register* (13%), the Internet in general (12%), and the City's websites (12%).
- Members of the business community were most likely to mention the *Orange County Register* (20%) as their source for information about City events, news and programming, followed by *The Leaflet* (16%), and the Internet in general (14%).
- When asked if they would use several different online services and features if offered by the City of Lake Forest in the future, anticipated use among residents was greatest for online registration for recreation programs (80%), an interactive map of the City that shows points of interest including parks, shopping centers and commercial properties (78%), online document retrieval for permits, agendas, records and other materials (70%), and the ability to pay for City services online (55%).
- Among the business community, anticipated use was greatest for interactive maps of the City (66%) and the ability to retrieve documents online (65%), followed by the ability to make payments online (53%), information kiosks and signs (40%), and streamed City Council meetings (27%).

CITY WEBSITES

- Forty-five percent (45%) of residents indicated that they had visited at least one of the City's websites in the 12 months prior to the interview.
- Forty-four percent (44%) of businesses indicated that they had visited at least one of the City's websites in the 12 months prior to the interview.
- Overall, visitors expressed high levels of satisfaction with the City's websites, with 81% of residents and 87% of businesses indicating that they were satisfied with the resources available on the sites.

FUTURE BUSINESS NEEDS

- Local businesses were generally optimistic about their future growth, with nearly two-thirds (66%) anticipating growth and nearly one-third (30%) expecting that their business would remain about the same. Just 1% indicated that they expect their business to decrease in the coming year.
- Among the 66% of businesses that anticipated growth, 17% indicated that they would require additional space or a larger building to accommodate the growth, whereas the remaining 49% were either unsure or did not anticipate needing additional space.
- Of the 8% of businesses that anticipated relocating in the next year, approximately half (4%) expected to relocate within Lake Forest, 1.5% to another community, and 2.5% were unsure.



C O N C L U S I O N S

As noted in the *Introduction*, this study was designed to provide the City of Lake Forest with a statistically reliable understanding of the community's satisfaction, priorities and needs as they relate to services and facilities provided by the City. As such, it can provide the City with information needed to make sound, strategic decisions in a variety of areas—including service improvements and enhancements, measuring and tracking internal performance, budgeting and planning. Whereas subsequent sections of this report are devoted to conveying the detailed results of the surveys, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

The following conclusions are based on the True North's interpretations of the results, as well as the firm's collective experience conducting similar studies for municipalities and other public agencies throughout the State.

How well is the City performing in meeting the needs of Lake Forest residents and businesses?

Lake Forest residents and business managers are one of the most satisfied communities that the Principals at True North have ever encountered. Moreover, the results of this study indicate that the City of Lake Forest has made significant gains in the past six years in meeting the community's needs and expectations.

In 2000, 89% of residents and 88% of local businesses indicated that they were generally satisfied with the job the City of Lake Forest is doing to provide municipal services. Although the overall satisfaction level increased modestly during the past six years to 91% for residents and remained stable among businesses at 87%, the *intensity* of satisfaction has improved dramatically. The percentage of residents who indicated that they were *very* satisfied with the City's overall performance increased from 45% in 2000 to 56% in 2006. The business community displayed similar patterns. Whereas 40% of business managers indicated that they were very satisfied with the City's overall performance in 2000, the corresponding figure in 2006 was 48%.

The high level of satisfaction expressed with the City's performance in general was in almost all cases echoed when residents and businesses were asked to comment on the City's efforts to provide a variety of specific services. For all but one service tested, the City is meeting the needs of at least 80% of residents and businesses, and for most of the services the City is meeting the needs of more than 90% of residents and businesses.

To the extent that the survey results can be viewed as a report card on the City's performance, the City receives straight A's for all but a few service areas. When compared to similar studies that True North's research team has conducted for California municipalities—as well as a nationwide survey sponsored by True North regarding residents' perceptions

of local government performance—the scores found in this study place the City of Lake Forest comfortably within the top 5% of municipalities in terms of service performance.

How does the City's performance impact the quality of life and business climate in the City?

The City's performance in providing municipal services has contributed to a high quality of life in the City. Nearly *every* resident surveyed (95%) rated the quality of the life in the City as excellent or good. When asked what they value most about living in Lake Forest, residents frequently cited the safety and low crime rate, the sense of community and friendly people, and the convenient location and proximity to areas of interest. Local businesses also perceived the benefits of the proximity of the City to local freeways and surrounding areas, the quality and image of the City, and the amount of quality local businesses and retailers.

It is instructive that when asked what they most want from the City of Lake Forest in the next two years, the most common response from both businesses and residents was nothing or not sure—which is indicative of a well-managed City that is doing a very good job meeting the needs of its residents and local businesses.

Where should the City focus its efforts in the future?

Perhaps the most important recommendation, and one that is occasionally overlooked in customer satisfaction research, is for the City to recognize the many things that it does exceptionally well and to focus on continuing to perform at a high level in these areas. As noted throughout this report, respondents were generally pleased with the City's efforts to provide services and facilities and have a favorable opinion of the City's performance in most areas. The top priority for the City should thus be to do what it takes to maintain the high quality of services that it currently provides.

However, as the City continues to strive for improvement, the results of this study do suggest opportunities to further bolster community satisfaction. Considering the list of services and their respective priority status for future City attention provided in the body of this report (see *Performance Needs & Priorities* on page 41), respondents' open-ended statements about what they want most from the City in the next two years (see *What I Want Most...* on page 23), and opinions about the most important issues facing the City (see *Local Issues* on page 12), the top priority for both residents and businesses is managing traffic congestion. Residents also identified providing adult sports programs, increased crime prevention/neighborhood watch programs, managing growth, and road improvements as priorities. Local businesses, on the other hand, identified a need for additional commercial and industrial space, business education events, free business consulting services, and business watch programs.

Having recommended that the City focus on these service areas, we feel it is equally important to stress that the appropriate strategy for improving resident satisfaction in these areas would likely be a combination of better communication and actual service improvements. It may be, for example, that many businesses are simply not aware of the City's existing business support services. Choosing the appropriate balance of actual service improvements and efforts to raise awareness on these matters will be a key to maintaining and improving residents' overall satisfaction in the short- and long-term.

Is City-Resident communication a concern for the City?

The aforementioned recommendations regarding public information notwithstanding, it should be recognized that the City of Lake Forest appears to do an *outstanding* job communicating with residents and local businesses. The levels of satisfaction expressed by the Lake Forest resident and business community with respect to the City's efforts to communicate with them through newsletters, the Internet and other means are among the highest that True North has *ever* encountered.

Moreover, unlike many cities that True North has worked with in which residents rely on conventional media sources such as local and regional papers for information about City news, events and programming, Lake Forest residents generally turn to the City's newsletter (*The Leaflet*) and City websites. They are also doing so in larger numbers in recent years.² This is undoubtedly one of the keys to understanding why residents in Lake Forest are so pleased with the City's communication efforts.

2. This is especially true for the City's websites, which have witnessed large increases since 2000 in the proportion of residents and businesses that report having visited the sites in the 12 months prior to the interview (see Figures 68 and 71).

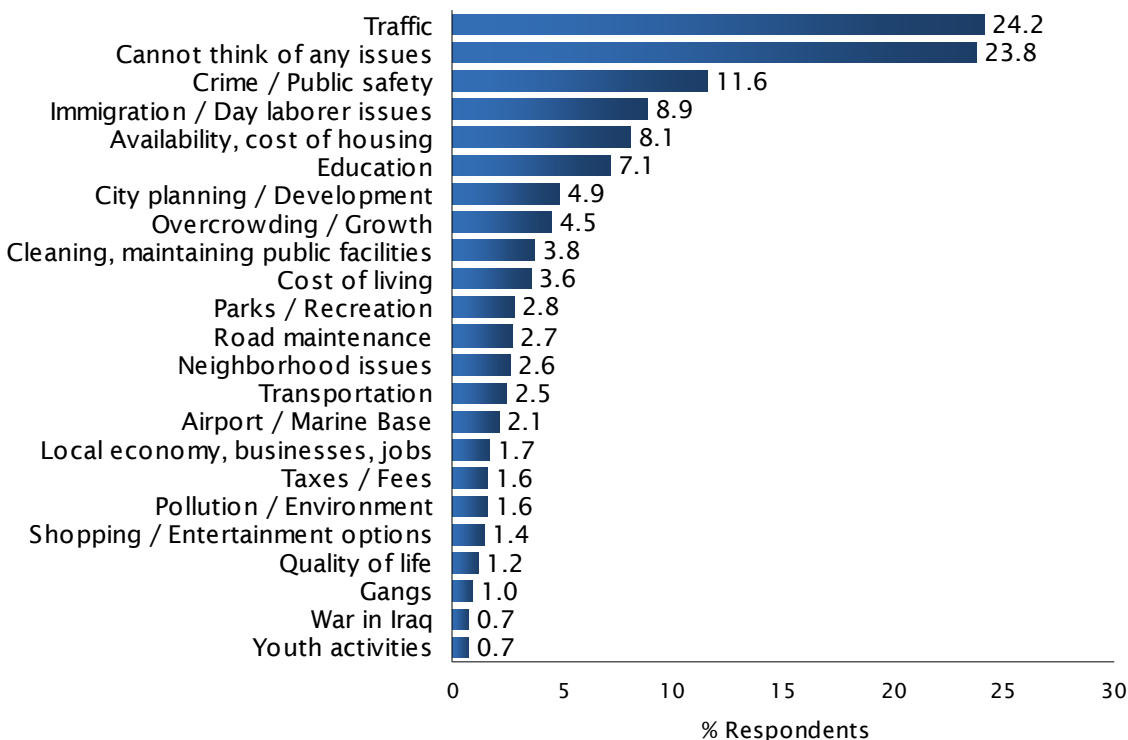
GENERAL PERCEPTIONS OF CITY & LOCAL ISSUES

The opening series of questions in the resident and business surveys were designed to assess top-of-mind perceptions about the quality of life in Lake Forest and the business climate, respectively, as well as gauge the importance that residents and businesses assign to specific issues in the City.

LOCAL ISSUES The first of these questions was designed to allow residents and businesses the opportunity to indicate what they feel is the most important issue facing the community in the City of Lake Forest. Rather than prompt respondents with specific issues, these questions were asked in an open-ended manner to encourage the respondent to mention the issue that was most salient to them at the time. The verbatim responses were later reviewed by True North and grouped into the categories shown in Figure 1 for residents and Figure 2 for the business community.

Question 2: Resident Survey *What do you feel is the most important issue facing residents of Lake Forest? Probe: Any others?*

FIGURE 1 MOST IMPORTANT ISSUES FACING RESIDENTS



Overall, nearly one-quarter (24%) of residents cited traffic congestion as the most important issue in Lake Forest, followed by crime/public safety issues (12%), immigration/day laborer issues (9%), and the availability/cost of housing (8%). Nearly one quarter (24%) of respondents

did not perceive (or were unable to offer) a specific issue or problem facing residents in Lake Forest.

Table 1 presents the top five issues mentioned by Lake Forest residents in response to this question dating back to 2000. As the El Toro Airport/Marine Base issues have been resolved in the past few years, traffic and public safety concerns have risen to the top of the scale. The introduction of the immigration/day laborer issue in 2006 is undoubtedly a reflection of the recent politicization of this issue in state and national politics.³

TABLE 1 TOP FIVE ISSUES FACING RESIDENTS (2006 ~ 2000)

Study Year			
2006	2004	2002	2000
Traffic	Traffic	El Toro Airport / Marine Base	El Toro Airport / Marine Base
Cannot think of any issues	Cannot think of any issues	Traffic	Traffic
Crime / Public safety	Crime / Public safety	Cannot think of any issues	Crime / Public safety
Immigration / Day laborer issues	El Toro Airport / Marine Base	Crime / Public safety	Availability, cost of housing
Availability, cost of housing	City planning / Redevelopment	Availability, cost of housing	Cannot think of any issues

In a manner similar to the resident survey, local businesses were asked what they feel is the most important issue facing the *business community* in the City of Lake Forest. This question was also asked in an open-ended manner to encourage the respondent to mention the issue that was most salient to them at the time of the interview. The verbatim responses were later reviewed by True North and grouped into the categories shown in Figure 2.

The most common response from business professionals to this question was that they were not sure or there were no important issues facing the business community in Lake Forest (49%). Among the specific issues mentioned, traffic congestion and its impact on customers’ ability to access local businesses was the most frequently cited issue (16%), followed by taxes/fees (5%), competition from other businesses (4%), and the affordability/availability of commercial space in the City (4%). All other issues were mentioned by less than 4% of businesses surveyed, respectively.

When compared to past surveys (see Table 2), traffic congestion continues to be the most salient issue facing the business community in Lake Forest.

3. The immigration issue was arguably the most salient domestic issue in both state and national politics during the general election cycle. Because the resident survey was conducted during the prime campaign season, the saliency of the immigration issue in response to Question 2 was higher than it would have been otherwise. It is worth noting, moreover, that True North encountered a similar pattern in another southern California city that conducted their resident survey during the 2006 general election campaign season.

Question 2: Business Survey *What do you feel are the one or two most important issues facing the business community of Lake Forest?*

FIGURE 2 MOST IMPORTANT ISSUES FACING BUSINESS COMMUNITY

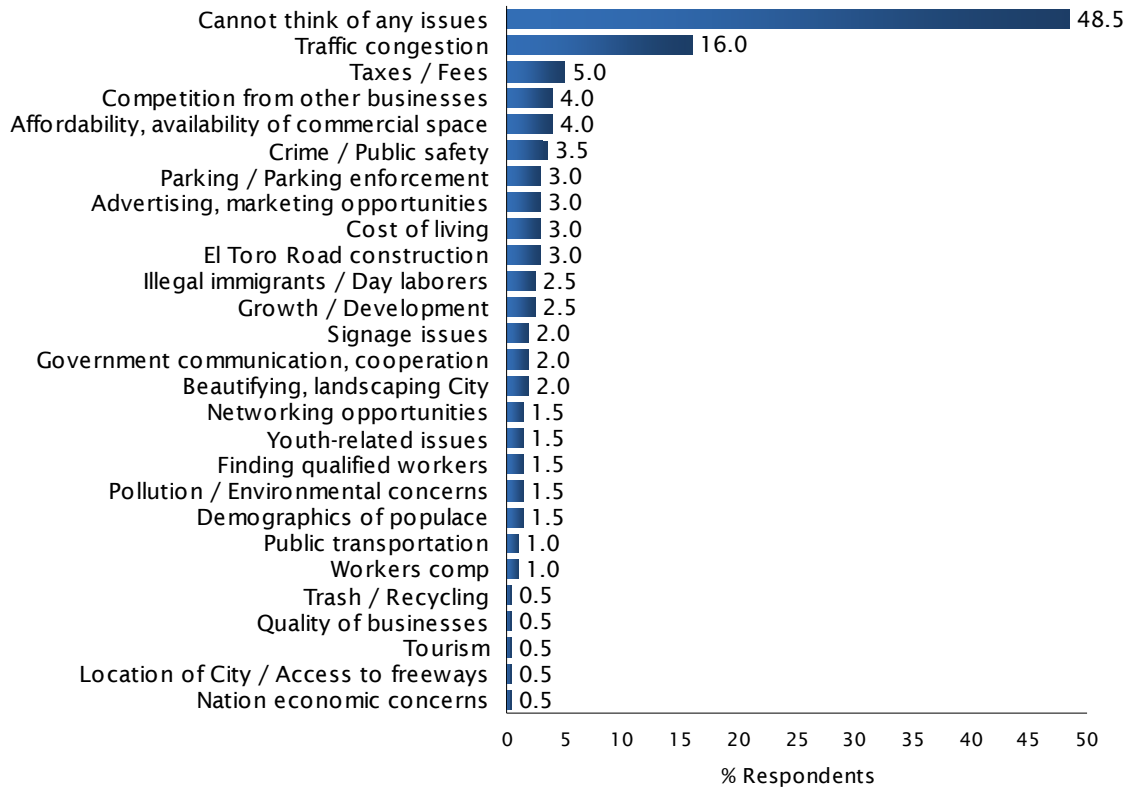


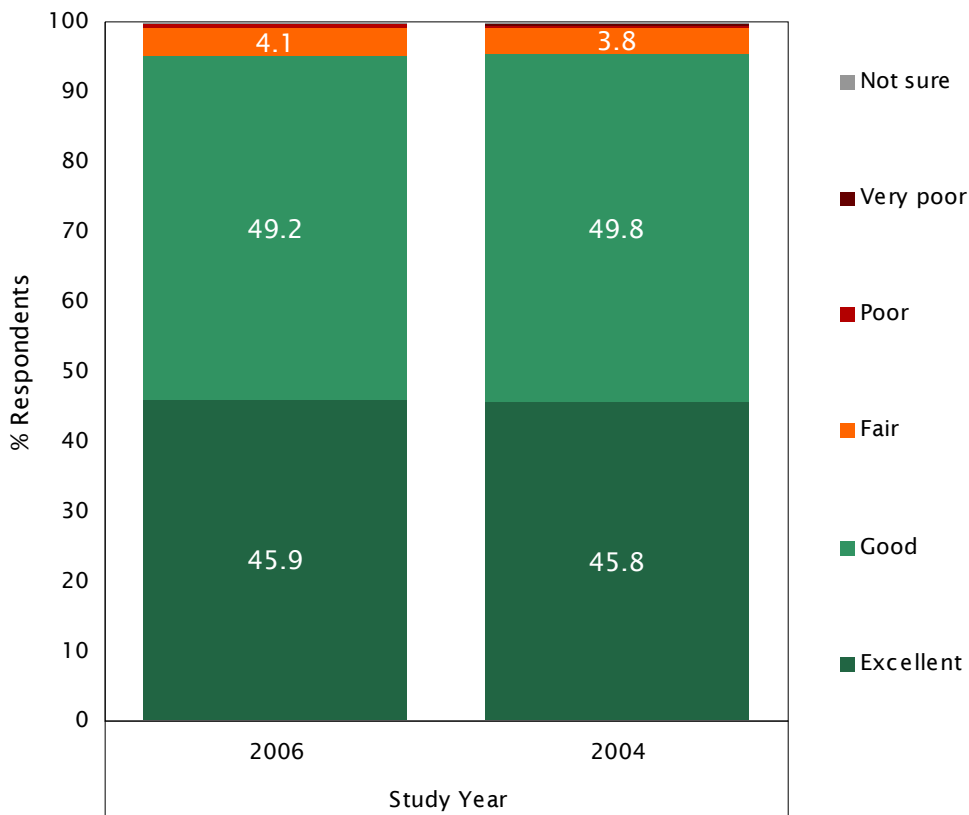
TABLE 2 TOP FIVE ISSUES FACING BUSINESS COMMUNITY (2006 ~ 2000)

Study Year			
2006	2004	2002	2000
Cannot think of any issues	Cannot think of any issues	Cannot think of any issues	Traffic congestion
Traffic congestion	Traffic congestion	Traffic congestion	Economic concerns
Taxes / Fees	Competition from other businesses	Economic concerns	El Toro Road
Competition from other businesses	Growth / Development	Recent loss of local businesses	Cost of living
Affordability, availability of commercial space	El Toro Road	Taxes / Fees	Cannot think of any issues

QUALITY OF LIFE The next question (Question 3) asked residents to rate the quality of life in the City, using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 3, the vast majority of respondents shared very favorable opinions of the quality of life in Lake Forest, with 46% reporting it is excellent, 49% good, and only 4% saying it is fair. Less than 1% of residents indicated that the quality of life in Lake Forest is poor or very poor. Moreover, as shown in the figure, these positive findings are nearly identical to those found in 2004.

Question 3: Resident Survey *How would you rate the overall quality of life in Lake Forest? Would you say it is excellent, good, fair, poor or very poor?*

FIGURE 3 OVERALL QUALITY OF LIFE (2006 ~ 2004)



For the interested reader, Figures 4 and 5 show how ratings of the quality of life in the City varied by years of residence in Lake Forest, presence of children in the home, household income, gender, age, and home ownership status. Although there was some variation in opinion—e.g., home owners were more likely than their renter counterparts to view the quality of life as excellent—the most striking pattern in these figures is the consistency of opinion. Regardless of subgroup category, respondents generally held a very positive assessment of the quality of life in the City.

FIGURE 4 OVERALL QUALITY OF LIFE BY YEARS IN LAKE FOREST AREA, CHILD IN HOME & HOUSEHOLD INCOME

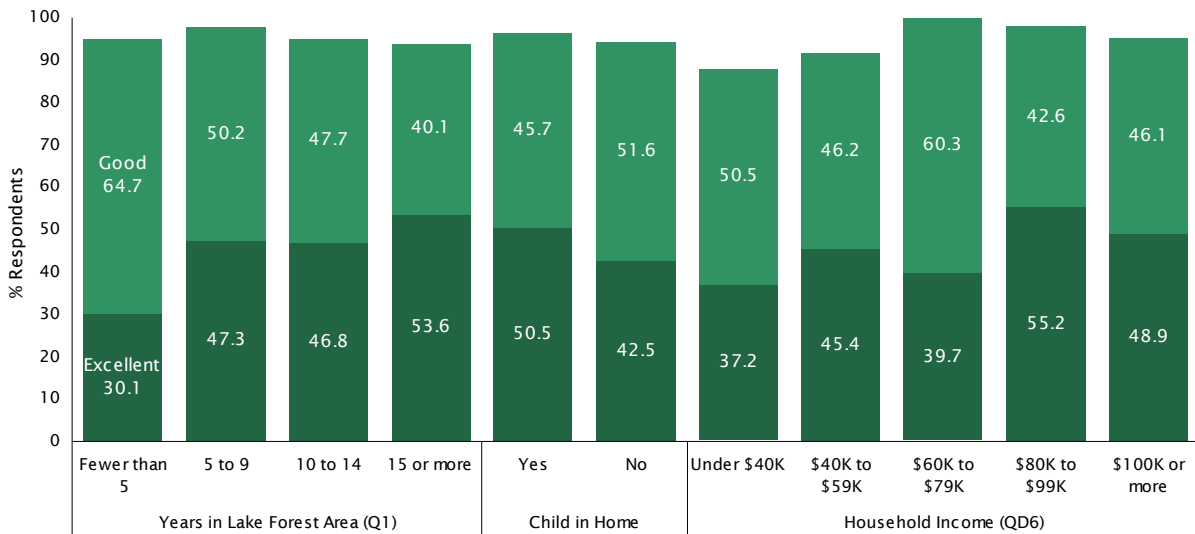
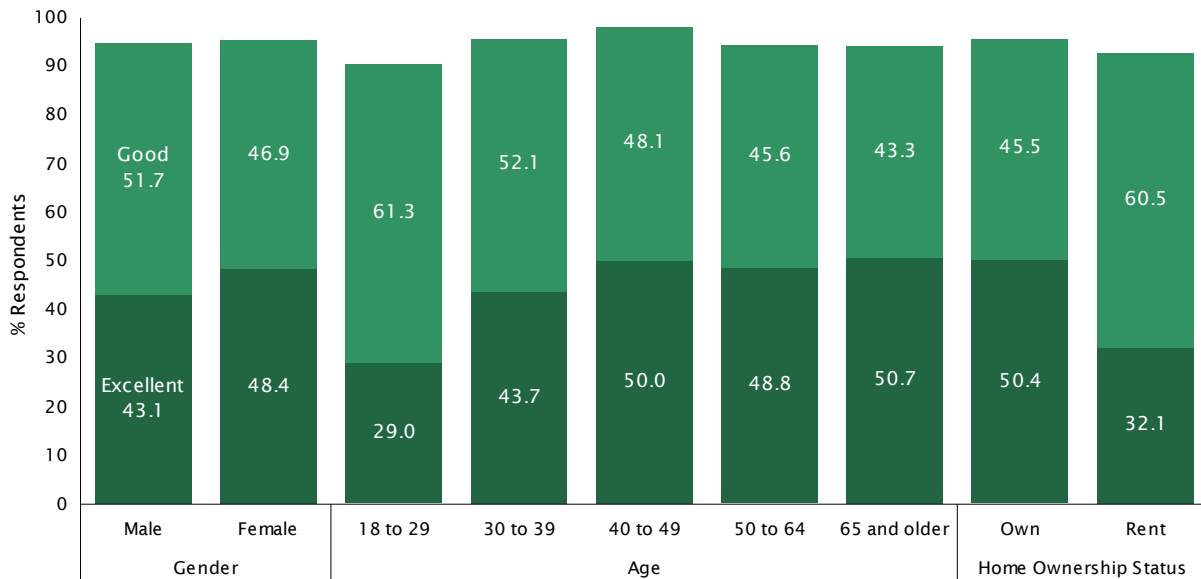


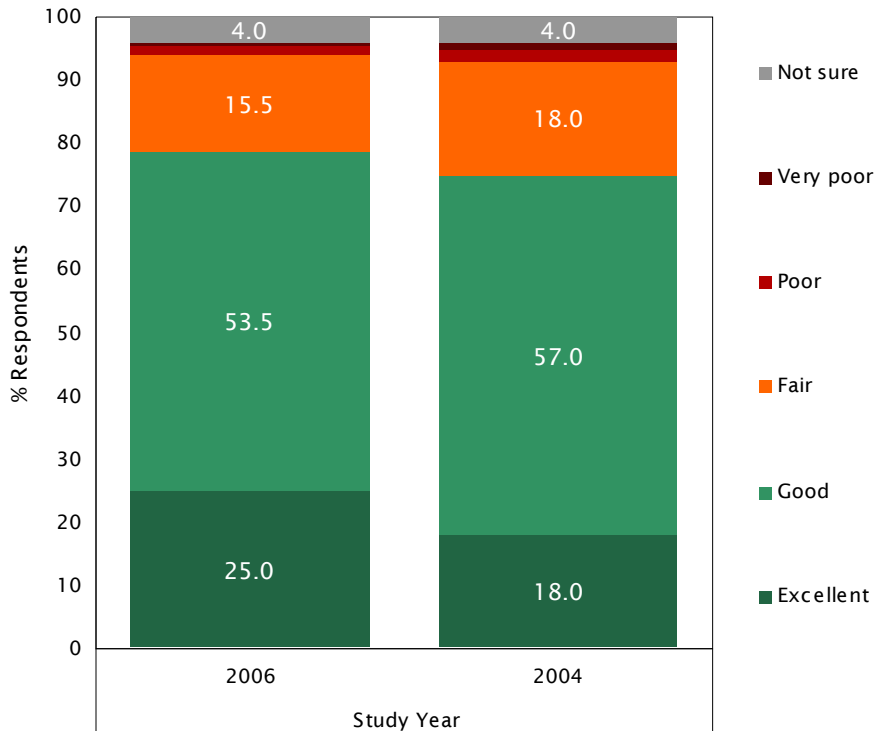
FIGURE 5 OVERALL QUALITY OF LIFE BY YEARS IN GENDER, AGE & HOME OWNERSHIP STATUS



BUSINESS CLIMATE Respondents in the business survey were similarly asked to rate the business climate in Lake Forest in comparison to the climate in other cities in the area using the same five point scale of excellent, good, fair, poor or very poor. As shown in Figure 6, most respondents shared a comparatively favorable opinion of Lake Forest’s business climate. Overall, 25% reported that it is excellent, 54% stated it is good, and 16% offered that it is fair. Just 2% of businesses indicated that, when compared to neighboring areas, the business climate in the City of Lake Forest is either poor or very poor. When compared to 2004, opinions of the business climate were slightly more favorable in 2006.

Question 3: Business Survey How would you rate the business climate in Lake Forest compared to other cities in the area? Would you say it is excellent, good, fair, poor, or very poor compared to other cities in the area?

FIGURE 6 QUALITY OF BUSINESS CLIMATE (2006 ~ 2004)



For the interested reader, Figures 7 and 8 show how respondents' rating of the business climate in the City was related to the number of employees they have in Lake Forest, whether they reside in the City, gender, years operating in the City, as well as the type of business they operate.

FIGURE 7 QUALITY OF BUSINESS CLIMATE BY NUMBER OF EMPLOYEES, RESIDENT OF LAKE FOREST & GENDER

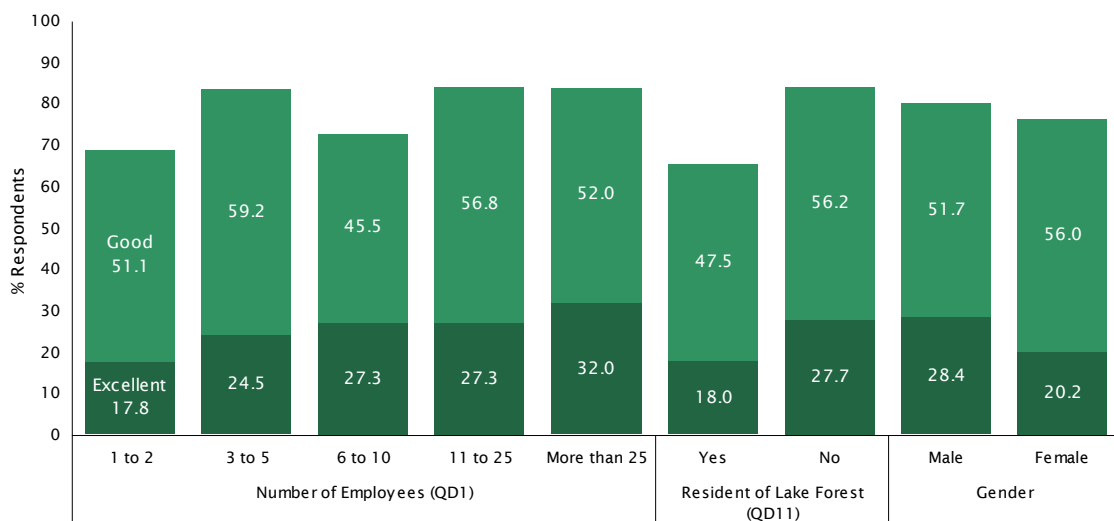
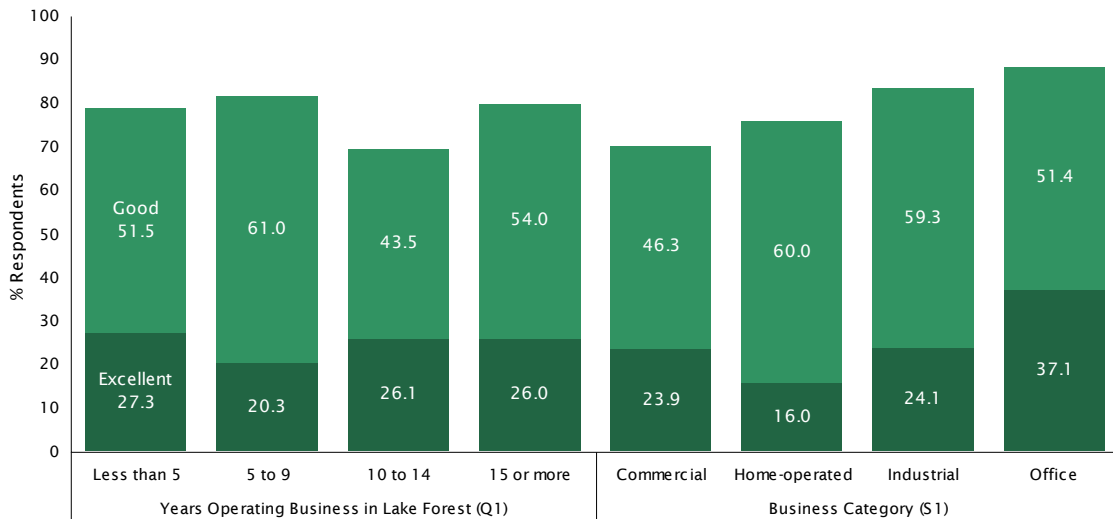


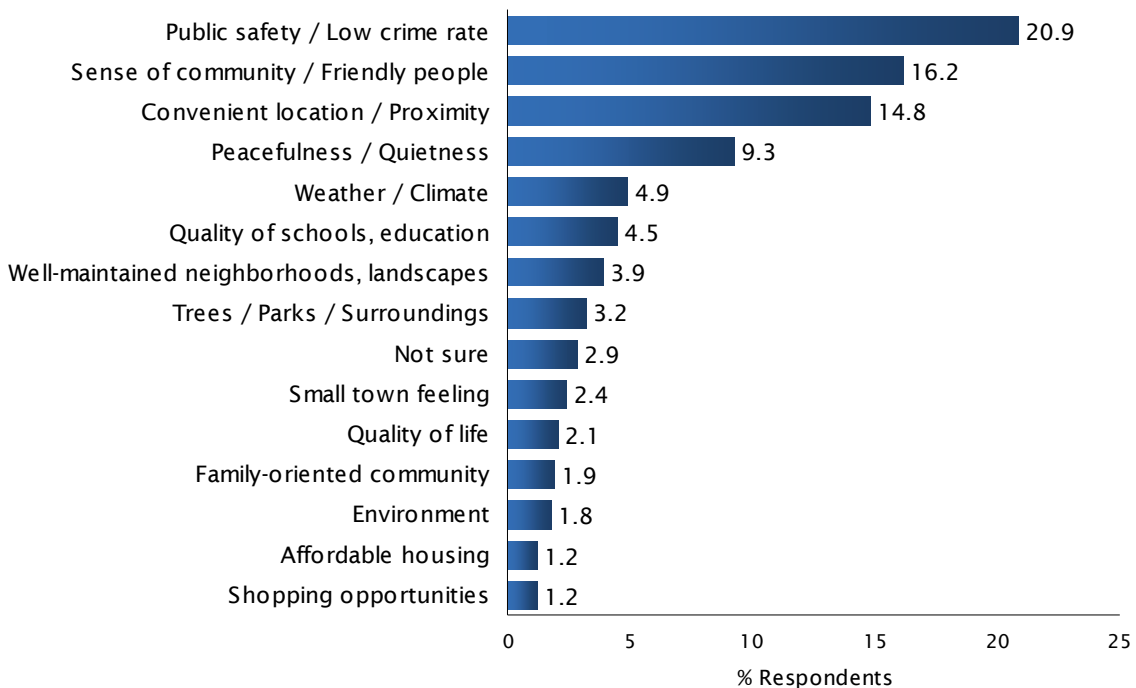
FIGURE 8 QUALITY OF BUSINESS CLIMATE BY YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY



WHAT DO YOU VALUE MOST ABOUT LAKE FOREST? All residents were next asked to indicate what it is that they value most about living in Lake Forest (Question 4). Similarly, all businesses were asked if there is a particular feature of Lake Forest that is beneficial to their business (Question 4). Both questions were posed in an open-ended manner, which allowed respondents to mention any aspect that came to mind without be prompted by—or restricted to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 9 for residents and Figure 10 for businesses.

Question 4: Resident Survey *What is it that you value most about living in Lake Forest?*

FIGURE 9 VALUE MOST ABOUT LIVING IN LAKE FOREST

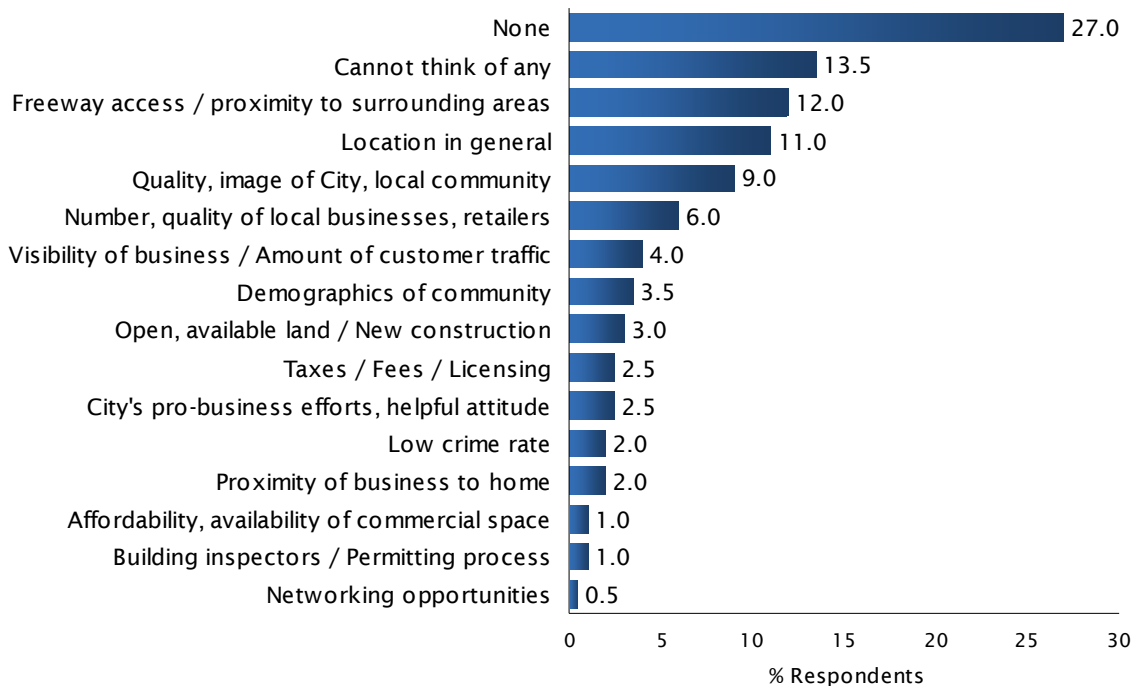


The safety of the community/low crime rate was the most valued aspect of living in Lake Forest for residents, being mentioned by 21% of respondents (see Figure 9). The sense of community/friendly people (15%), the peace and quiet (9%), the weather (5%), and the quality of local schools (5%) were also commonly cited as things residents value about Lake Forest. No other single aspect was mentioned by at least 4% of residents, respectively.

The most common responses to Question 4 among businesses were that there were no particular features of Lake Forest that benefit their business (27%) or that there may be, but they could not think of one at the time of the interview (14%). Among the specifics aspects that were mentioned, proximity to freeways and surrounding areas of interest (12%), the location of the City in general (11%), the quality/image of the City and local community (9%), and the number/quality of local businesses and retailers (6%) were cited most often (Figure 10).

Question 4: Business Survey *Is there a particular aspect or feature of Lake Forest that is beneficial to your business? If yes, ask: Please describe the aspect of Lake Forest that benefits your business.*

FIGURE 10 FEATURE OR ASPECT OF LAKE FOREST THAT IS BENEFICIAL TO BUSINESS



OVERALL SATISFACTION

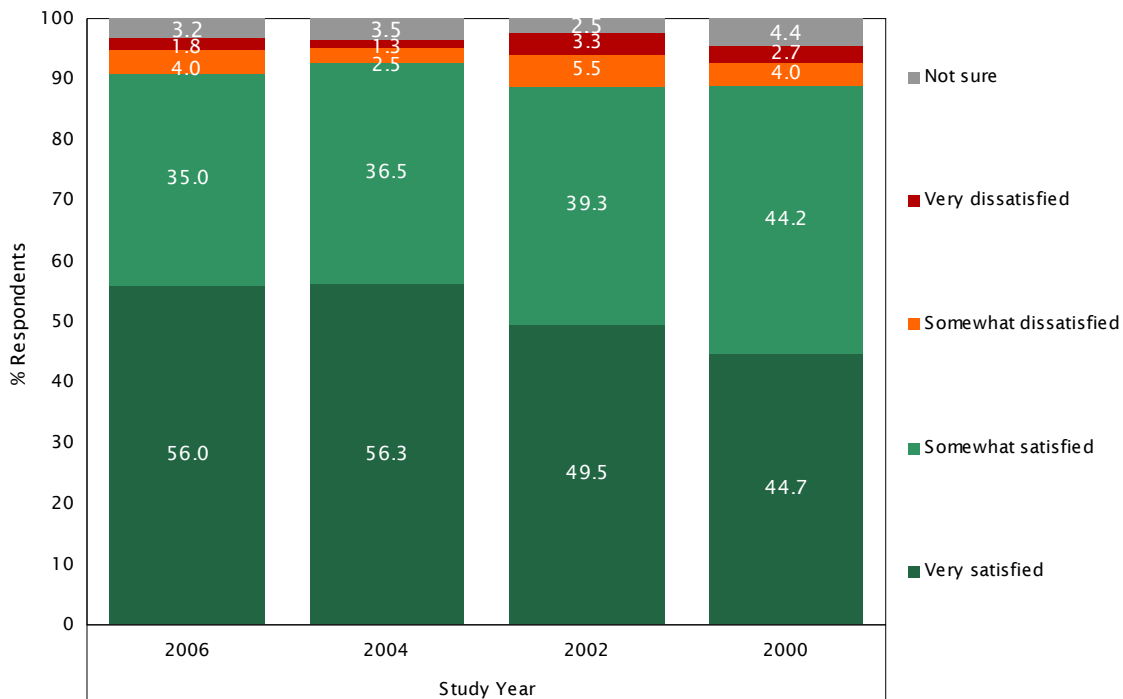
The next series of questions in the surveys addressed respondents' overall level of satisfaction with the job the City of Lake Forest is doing to provide city services, as well as what they most want the City to accomplish in the next two years. Because these questions were asked in an identical manner in the resident and business surveys, the results for both surveys are presented in this section.

OVERALL PERFORMANCE RATING Both residents and businesses were asked to rate the job the City of Lake Forest is doing to provide municipal services. Because this question does not reference a specific program, facility, or service and requested that the respondent consider the City's performance in general, the findings of this question may be regarded as an *overall performance rating* for the City.

Figure 11 presents the results to this question for the resident survey for 2006 and for prior surveys dating back to 2000, whereas Figure 14 on page 22 presents the corresponding results for the business survey. In both cases, the overwhelming majority of respondents indicated that they were satisfied with the City of Lake Forest's efforts to provide municipal services. Specifically, 91% of residents and 87% of local businesses in 2006 indicated that they were satisfied in this respect. The intensity of satisfaction has also grown over time, with the percentage of respondents stating that they were *very* satisfied increasing from 45% to 56% among residents and from 40% to 48% among businesses between 2000 and 2006.

Question 5: Resident Survey *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

FIGURE 11 OVERALL SATISFACTION: RESIDENT SURVEY (2006 ~ 2000)



For the interested reader, Figures 12 and 13 display how overall satisfaction with the City’s performance in providing municipal services varied by key resident traits. Figures 15 and 16 present similar information for the business community.

FIGURE 12 OVERALL SATISFACTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, CHILD IN HOME & HOUSEHOLD INCOME

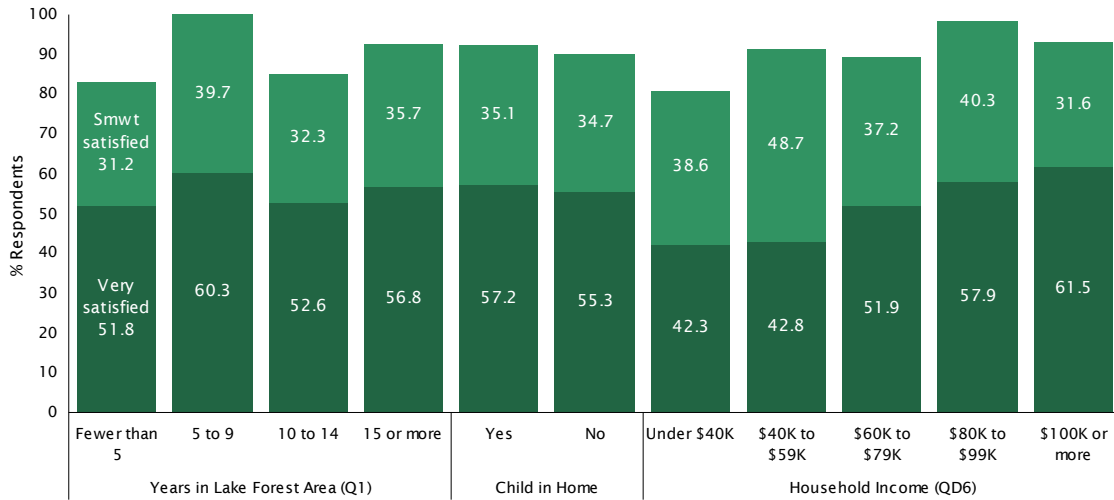
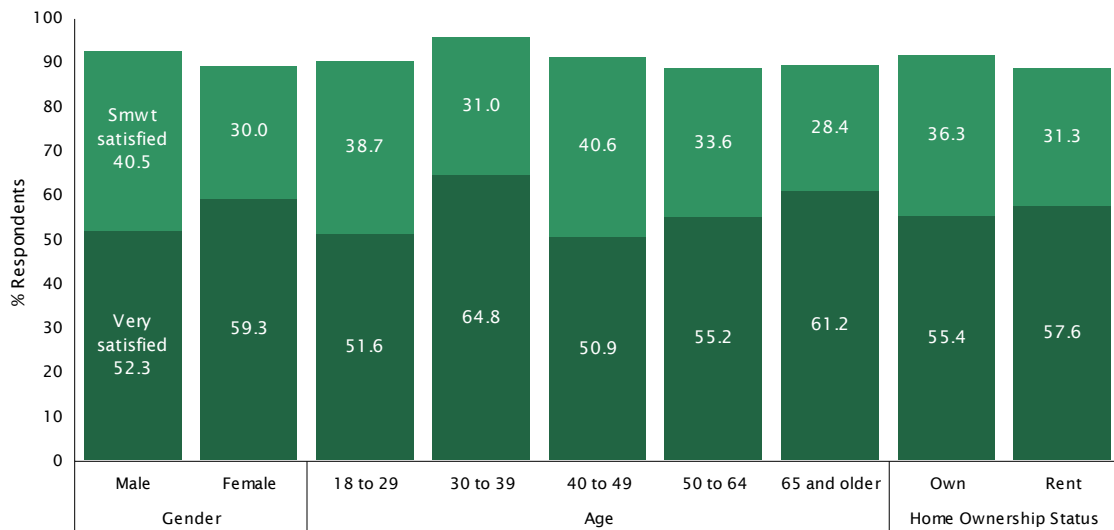


FIGURE 13 OVERALL SATISFACTION: RESIDENT SURVEY BY GENDER, AGE & HOME OWNERSHIP STATUS



Question 5: Business Survey *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

FIGURE 14 OVERALL SATISFACTION: BUSINESS SURVEY (2006 ~ 2000)

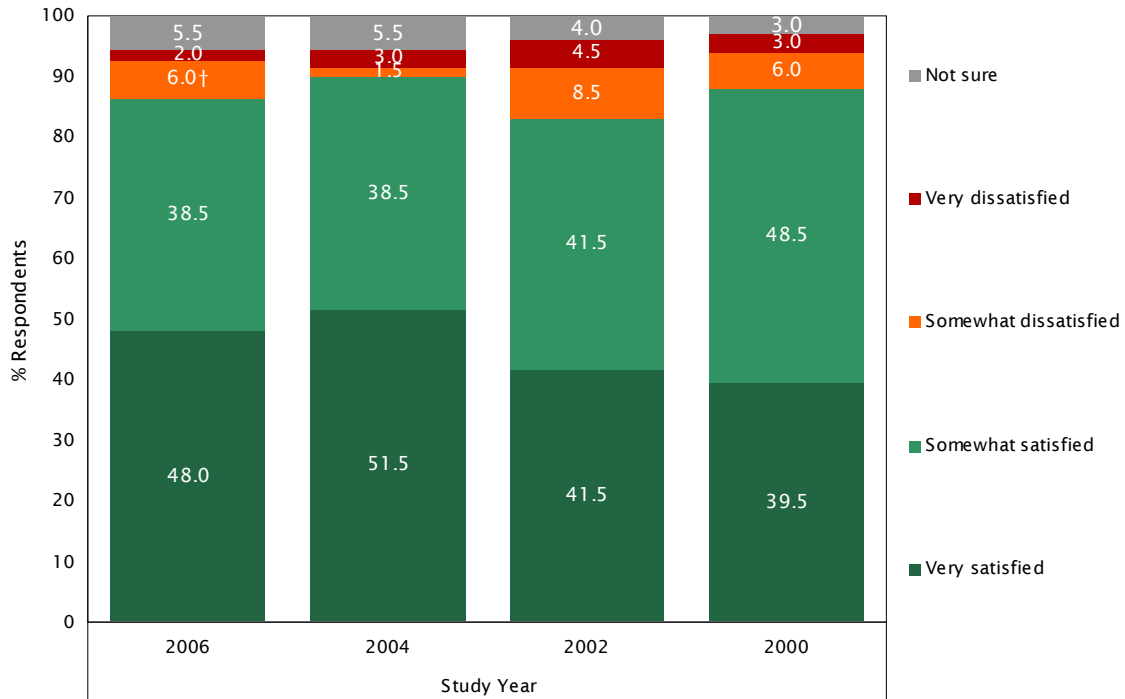


FIGURE 15 OVERALL SATISFACTION: BUSINESS SURVEY BY NUMBER OF EMPLOYEES, VISITED CITY WEBSITE & RESIDENT OF LAKE FOREST

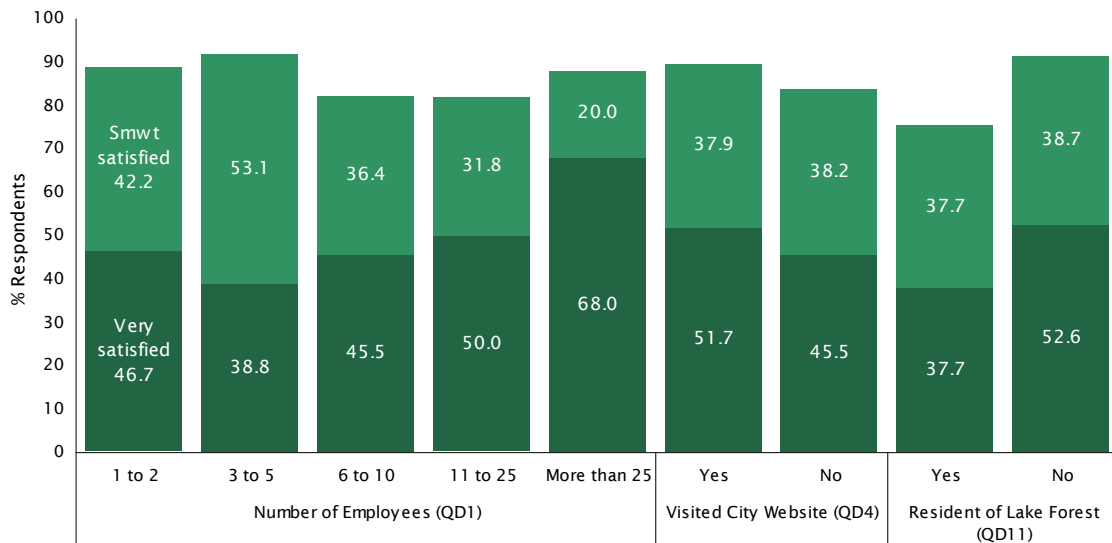
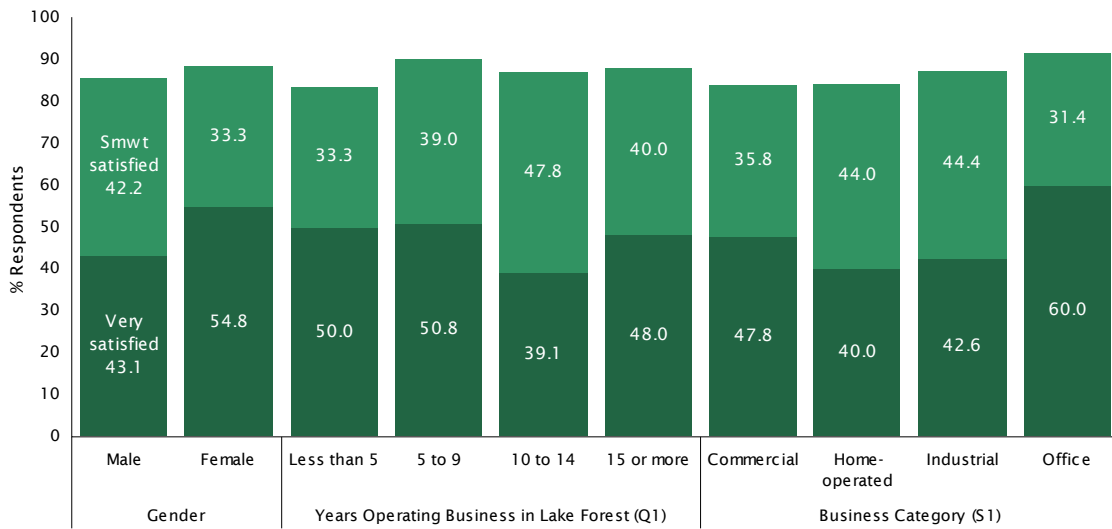


FIGURE 16 OVERALL SATISFACTION: BUSINESS SURVEY BY GENDER, YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY



WHAT I WANT MOST... The final question in this series asked respondents in an open-ended manner to indicate what they most want the City to accomplish during the next two years. The answers to this question were recorded verbatim and were later grouped by True North into the categories shown in Figures 17 (Resident) and 18 (Business). In both cases, the most common response to this question was ‘not sure’ or ‘nothing’. Reducing traffic and improving traffic flow was the most frequently mentioned improvement sought by residents (11%), followed by increasing crime prevention and public safety (9%), limiting growth (7%), and road improvements (7%). Although businesses also mentioned a desire for reduced traffic (9%), they differed with residents in their stated desire for continued growth and the need for more commercial and industrial space (11%). Businesses also mentioned improving support of the local business community (7%), redeveloping/beautifying/landscaping the City (7%), improving public safety (4%), and completing construction projects in a timely manner (4%). Tables 3 and 4 display the five most common responses to Question 6 in 2006 and 2004 for the resident and business communities, respectively.

Question 6: Resident Survey *I'm going to read you a sentence, and I'd like you to finish it for me. Here is the sentence: What I want most from the City of Lake Forest over the next two years is: _____.*

FIGURE 17 WANT FROM LAKE FOREST IN NEXT TWO YEARS: RESIDENT SURVEY

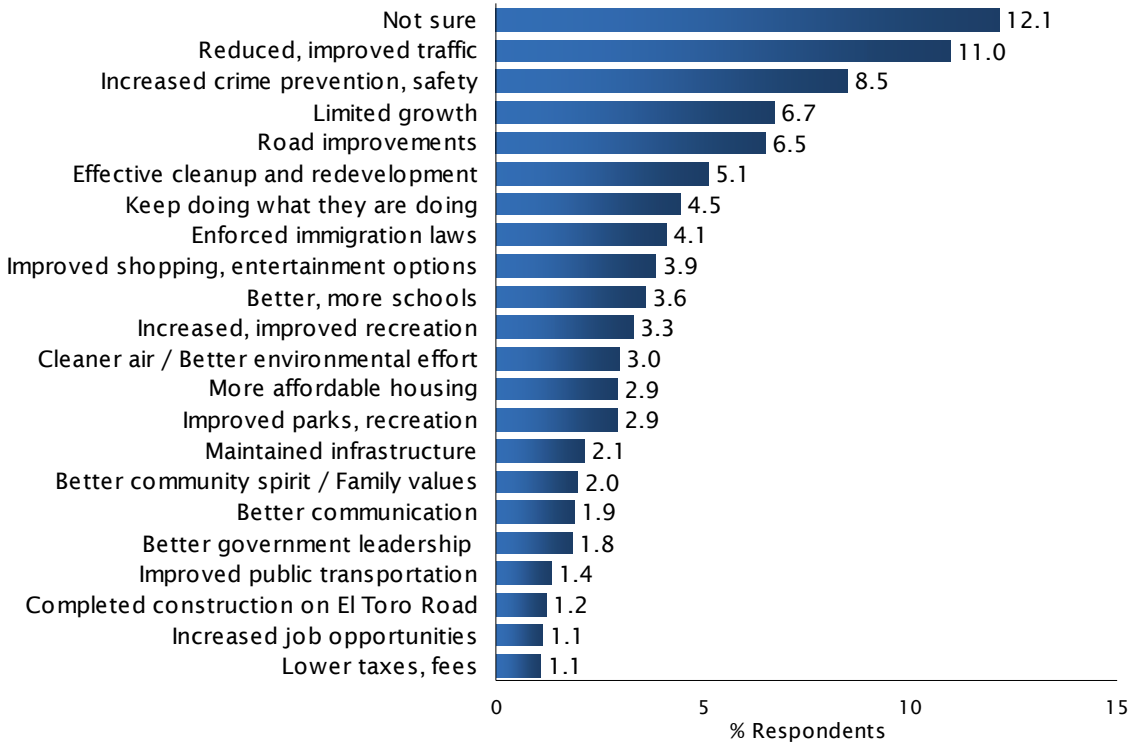


TABLE 3 WANT FROM LAKE FOREST IN NEXT TWO YEARS: RESIDENT SURVEY (2006 ~ 2004)

Study Year	
2006	2004
Not sure	Not sure
Reduced, improved traffic	Reduced, improved traffic
Increased crime prevention, safety	Completed construction on El Toro Road
Limited growth	Keep doing what they are doing
Road improvements	Road improvements

Question 6: Business Survey *I'm going to read you a sentence, and I'd like you to finish it for me. Here is the sentence: What I want most from the City of Lake Forest over the next two years is: _____.*

FIGURE 18 WANT FROM LAKE FOREST IN NEXT TWO YEARS: BUSINESS SURVEY

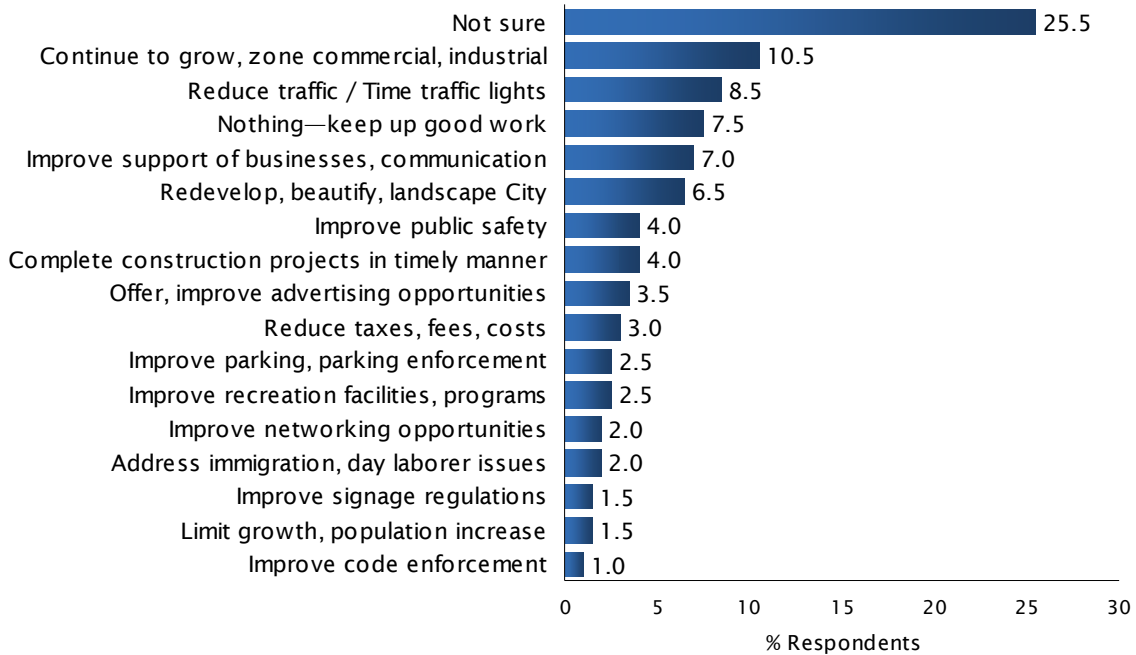


TABLE 4 WANT FROM LAKE FOREST IN NEXT TWO YEARS: BUSINESS SURVEY (2006 ~ 2004)

Study Year	
2006	2004
Not sure	Not sure
Continue to grow, zone commercial, industrial	Reduce traffic / Time traffic lights
Reduce traffic / Time traffic lights	Continue to grow, zone commercial, industrial
Nothing—keep up good work	Improve support of businesses, communication
Improve support of businesses, communication	Redevelop, beautify, landscape City

SPECIFIC SERVICES: RESIDENT SURVEY

Whereas Question 5 addressed the City's *overall* performance, the next series of questions asked respondents to rate the importance of *specific* services offered by the City, as well as their level of satisfaction with efforts to provide these services. For each service, respondents were first asked whether they thought a service was extremely important, very important, somewhat important or not at all important. Respondents were then asked about their level of satisfaction with these same services. To minimize respondent fatigue that can occur with lengthy lists in a survey, the services were divided by department. Within department lists, the order of the items was randomized to avoid a systematic position bias. Because the list of services presented to residents was somewhat different than that presented to businesses, the results are displayed separately for the two groups. This section of the report presents the results for the resident survey, whereas the results for the business survey are discussed in the next section.

POLICE SERVICES Figure 19 presents the services provided by Police Services in rank order of importance according to the proportion of respondents who rated a service as *at least* very important. Overall, residents rated maintaining a low crime rate as the most important service (94% extremely or very important), followed by investigating criminal activity (92%), and preparing for emergencies (86%). At the other end of the spectrum, providing animal control services (42%) and providing neighborhood watch programs (56%) were viewed as comparatively less important. Table 5 displays the percentage of respondents who were satisfied with each service for 2006 and 2004, as well as the difference between the two studies. None of the differences were statistically significant.

Question 7: Resident Survey *Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Police Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?*

FIGURE 19 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY

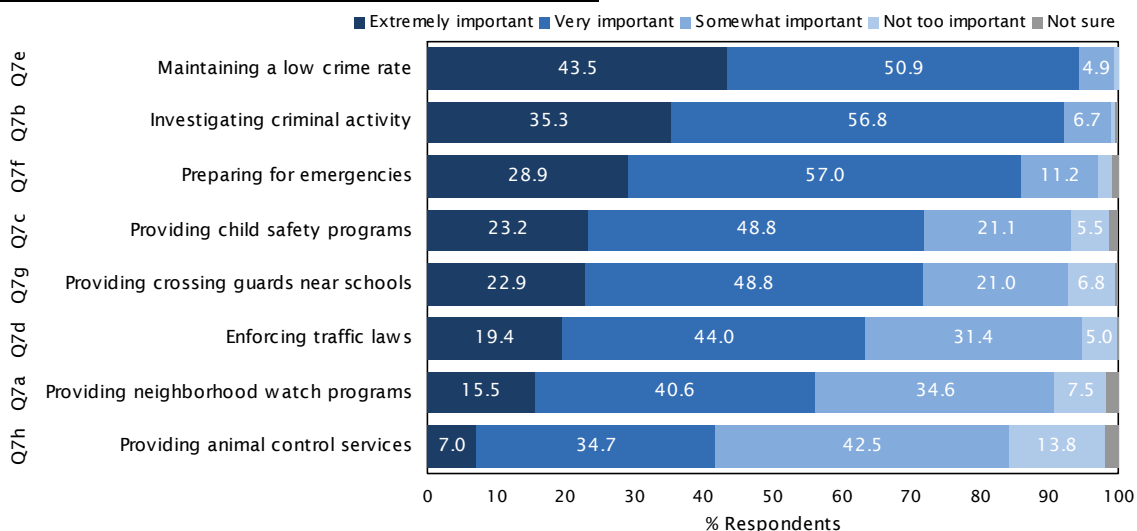


TABLE 5 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY (2006 ~ 2004)

	Study Year		Change in Extremely + Very Important
	2006	2004	
Maintaining a low crime rate	94.4	96.0	-1.7
Investigating criminal activity	92.2	91.1	+1.1
Preparing for emergencies	85.9	79.9	+6.0
Providing child safety programs	72.0	72.7	-0.7
Providing crossing guards near schools	71.7	73.2	-1.5
Enforcing traffic laws	63.4	68.5	-5.0
Providing neighborhood watch programs	56.1	54.9	+1.2
Providing animal control services	41.7	51.5	-9.8

Turning to the satisfaction component, Figure 20 sorts the same list of services according to the proportion of respondents who indicated that they were either very or somewhat satisfied with the City’s efforts to provide the service. To allow for an apples-to-apples comparison of the satisfaction ratings, only respondents who held an opinion (either satisfied or dissatisfied) were included in Figure 20. Those who did not have an opinion were removed from this analysis. The percentage who held an opinion for each service is shown to the right of the service label in parentheses. Thus, for example, among the 85% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 67% were very satisfied and 29% were somewhat satisfied. This reporting convention is followed for all departments for the resident and business surveys.

Overall, respondents were most satisfied with the Department’s efforts to provide crossing guards near schools (96%), maintain a low crime rate (95%), and provide child safety programs (94%). Table 6 shows how the results compared with the prior 2004 study, although none of the differences were statistically significant.

Question 8: Resident Survey *For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 20 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY

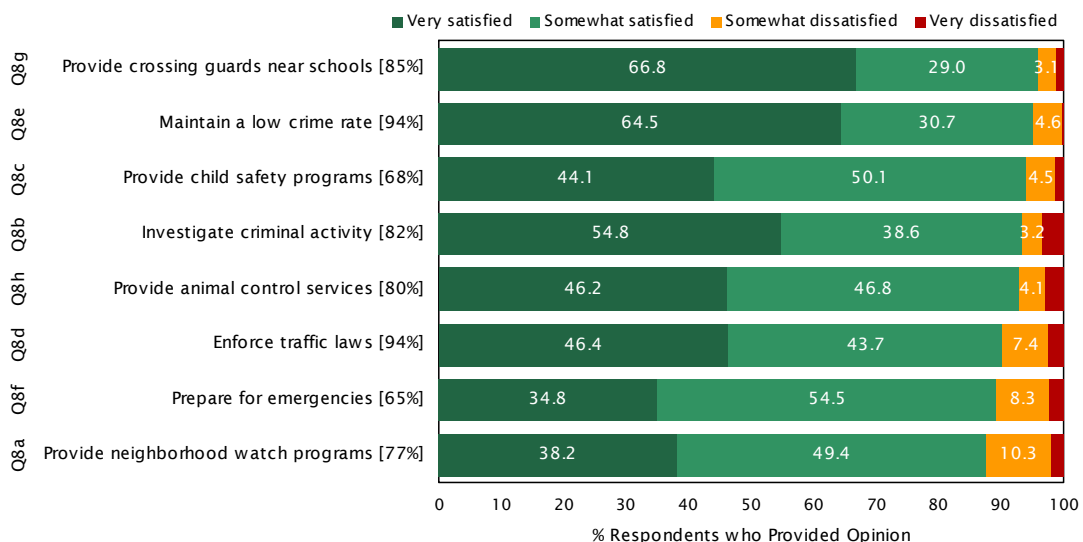


TABLE 6 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY (2006 ~ 2004)

	Study Year		Change in Satisfaction
	2006	2004	
Provide crossing guards near schools	95.8	N/A	N/A
Maintain a low crime rate	95.2	97.4	-2.3
Provide child safety programs	94.2	92.0	+2.2
Investigate criminal activity	93.4	95.9	-2.5
Provide animal control services	93.0	90.0	+3.0
Enforce traffic laws	90.1	94.0	-3.9
Prepare for emergencies	89.4	94.0	-4.6
Provide neighborhood watch programs	87.6	86.7	+0.9

DEVELOPMENT SERVICES DEPARTMENT Figure 21 presents the services provided by the Development Services Department in rank order of importance according to the proportion of residents who rated a service as *at least* very important. Overall, residents rated inspecting buildings as the most important service provided by the Department (64%), followed by issuing building permits (57%), enforcing zoning regulations (56%), enforcing architectural standards (50%), and enforcing sign regulations (40%).

When compared to 2004, there was a statistically significant increase in the percentage of respondents who rated inspecting buildings and issuing building permits as extremely or very important (see Table 7 on page 29).

Question 9: Resident Survey *Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Development Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?*

FIGURE 21 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY

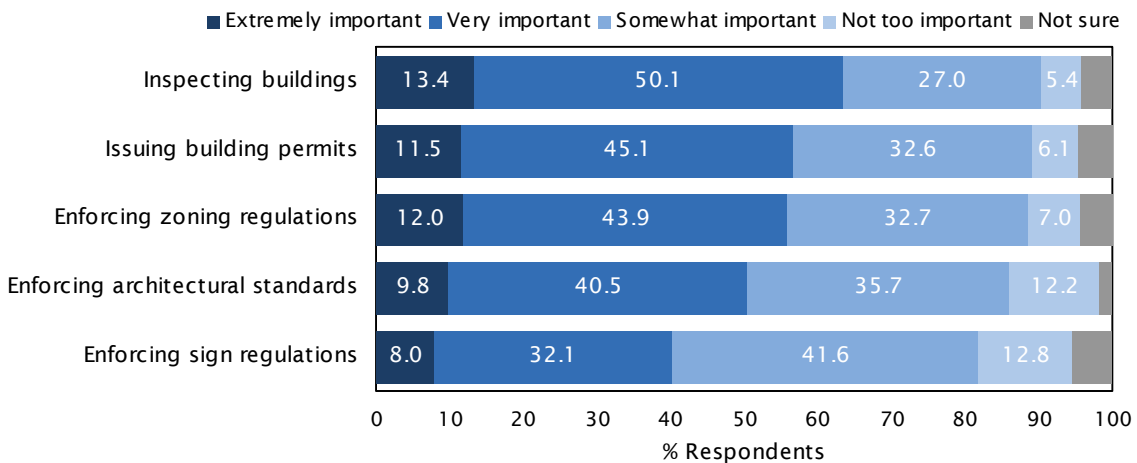


TABLE 7 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY (2006 ~ 2004)

	Study Year		Change in Extremely + Very Important
	2006	2004	
Inspecting buildings	63.5	53.4	+10.1 †
Issuing building permits	56.6	44.1	+12.5 †
Enforcing zoning regulations	55.9	54.5	+1.4
Enforcing architectural standards	50.4	N/A	N/A
Enforcing sign regulations	40.2	43.5	-3.3

† Statistically significant change (p < 0.05) between the 2004 and 2006 studies.

Figure 22 presents residents' overall satisfaction with the same list of services provided by the Development Services Department. Overall, the ratings assigned to the four services were quite similar, with satisfaction ranging from a low of 93% for enforcing sign regulations to a high of 94% for issuing building permits. Moreover, as shown in Table 8, residents' satisfaction with the Development Services Department's performance has remained virtually unchanged since 2004. It is worth noting, however, that satisfaction was somewhat lower for three of the services among residents who reported that they had personally used services offered by the Department in the past year (see Table 9).

Question 10: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to: -----, or do you not have an opinion?*

FIGURE 22 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY

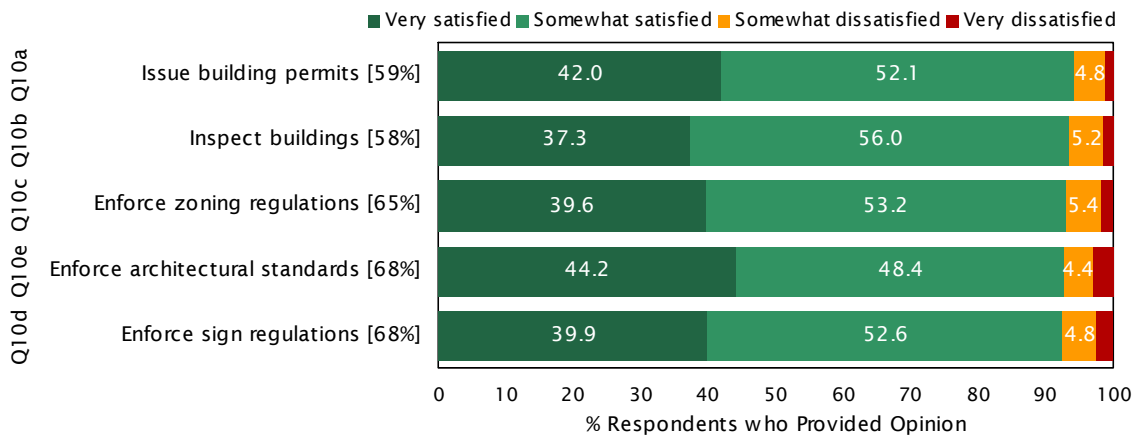


TABLE 8 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY (2006 ~ 2004)

	Study Year		Change in Satisfaction
	2006	2004	
Issue building permits	94.1	95.2	-1.1
Inspect buildings	93.3	93.6	-0.3
Enforce zoning regulations	92.8	94.3	-1.5
Enforce architectural standards	92.6	N/A	N/A
Enforce sign regulations	92.5	91.9	+0.6

TABLE 9 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY BY INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR

	Used Development Services Department Services in Past Year		Difference in Satisfaction
	Yes	No	
Issue building permits	95.2	93.9	+1.3
Inspect buildings	94.3	93.2	+1.1
Enforce zoning regulations	83.1	94.5	-11.4
Enforce architectural standards	87.7	93.3	-5.6
Enforce sign regulations	84.2	93.8	-9.6

Whereas most departments in the City that directly serve the public primarily interact with residents, customers of the Development Services Department are, for the most part, businesses. One question of interest to the 2006 study was whether a respondent had interacted with the Development Services Department during the past year. As shown in Figure 23, just 11% of residents surveyed indicated that they had interacted with the Department during the 12 months prior to the survey. When compared to their respective counterparts, interaction with the Development Services Department during this period was most frequently reported by residents on the extreme ends of the household income scale (less than \$40,000 or \$100,000+), as well as home owners (see Figure 24).

Question 11: Resident Survey *In the past year, have you applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department?*

FIGURE 23 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY

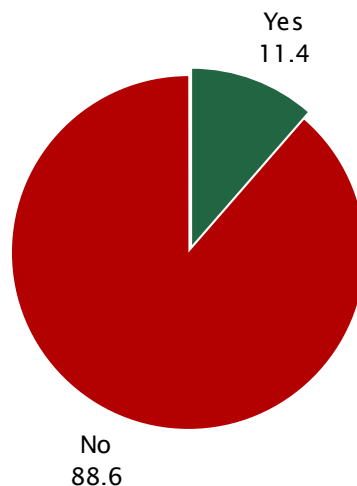
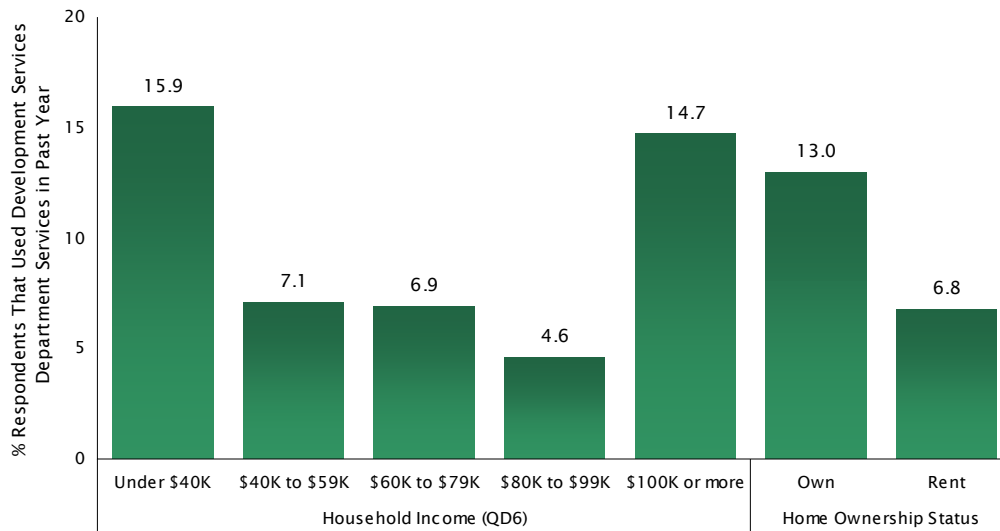


FIGURE 24 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY BY HOUSEHOLD INCOME & HOME OWNERSHIP STATUS



PUBLIC WORKS DEPARTMENT The next figure presents the importance that residents assigned to nine services provided by the Public Works Department, in rank order. Overall, maintaining local streets and roads was viewed as the most important service (91%), followed by reducing traffic congestion (90%), and providing garbage and recycling services (85%). When compared to 2004, there were no statistically significant changes in the importance assigned to the services provided by the Public Works Department (see Table 10).

Question 12: Resident Survey Next, I'd like to ask about several services provided by the Public Works Department. For each of the following, please tell me whether the service is extremely important to you, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?

FIGURE 25 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY

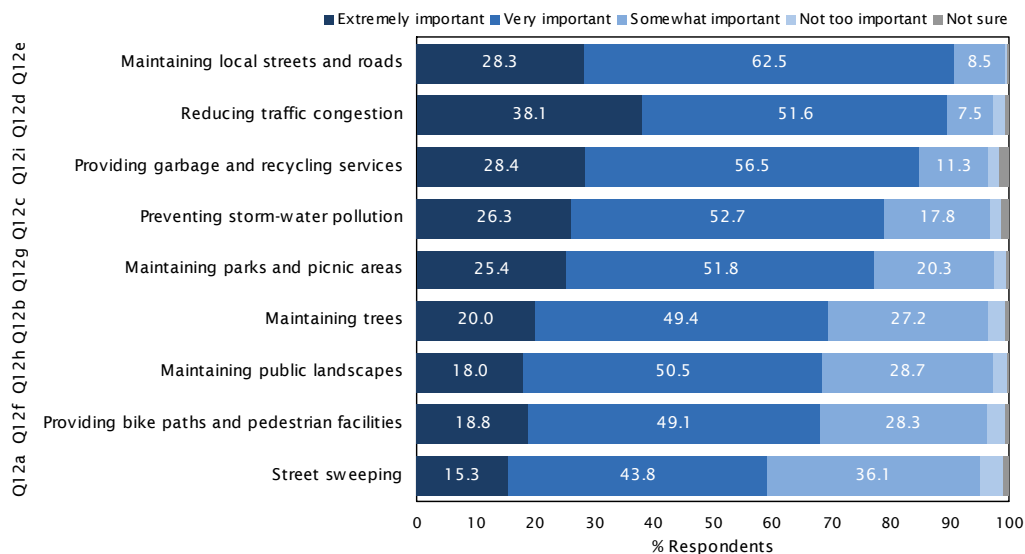


TABLE 10 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY (2006 ~ 2004)

	Study Year		Change in Extremely + Very Important
	2006	2004	
Street sweeping	59.1	56.0	+3.1
Maintaining trees	69.4	67.3	+2.1
Preventing storm-water pollution	79.0	78.7	+0.3
Reducing traffic congestion	89.7	90.2	-0.5
Maintaining local streets and roads	90.8	92.2	-1.4
Providing bike paths and pedestrian facilities	68.0	63.2	+4.8
Maintaining parks and picnic areas	77.2	73.4	+3.8
Maintaining public landscapes	68.5	64.9	+3.6
Providing garbage and recycling services	84.9	84.8	+0.1

Figure 26 presents the overall levels of satisfaction with the same list of services provided by the Public Works Department. Residents were most satisfied with the Department’s efforts to maintain parks and picnic areas (96%), provide street sweeping services (94%), and maintain public landscapes (94%). Only one service stood out as having markedly lower satisfaction among residents: reducing traffic congestion (70%). When compared to 2004, the levels of satisfaction were statistically similar for each service tested for the Public Works Department (see Table 11).

Question 13: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 26 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY

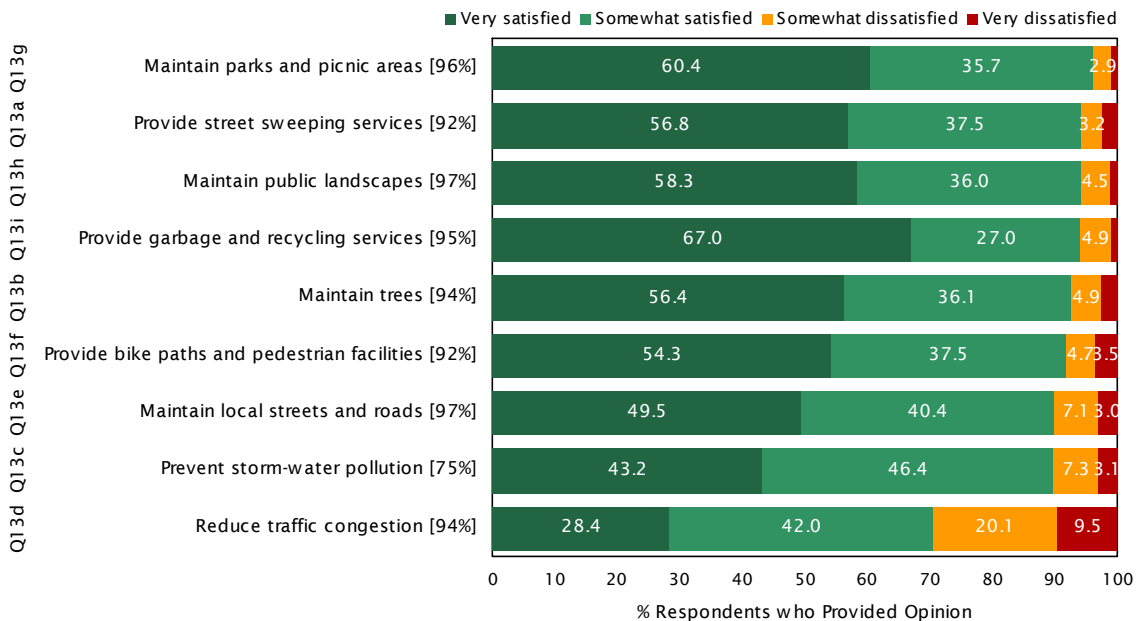


TABLE 11 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY (2006 ~ 2004)

	Study Year		Change in Satisfaction
	2006	2004	
Maintain parks and picnic areas	96.1	96.0	+0.2
Provide street sweeping services	94.3	92.8	+1.5
Maintain public landscapes	94.3	93.3	+1.0
Provide garbage and recycling services	94.1	92.5	+1.5
Maintain trees	92.5	93.1	-0.6
Provide bike paths and pedestrian facilities	91.8	95.4	-3.5
Maintain local streets and roads	89.9	89.8	+0.1
Prevent storm-water pollution	89.6	91.5	-1.9
Reduce traffic congestion	70.4	73.1	-2.6

COMMUNITY SERVICES DEPARTMENT In a format identical to that used in questions 7, 9, and 12, Question 14 asked residents to indicate the level of importance they associated with services provided by the Community Services Department. Figure 27 presents each of the services tested, in rank order of importance. Overall, residents assigned the highest importance to providing recreation and sports programs for teens (67%), followed by providing recreation and sports programs for elementary school-aged children (61%), and providing special events (58%). At the other end of the spectrum, providing adult sports programs (29%) and providing adult recreation programs (41%) were viewed as comparatively less important. Although there were some changes in the perceived importance of services between 2004 and 2006, the results were not statistically significant (see Table 12).

Question 14: Resident Survey *Next I'd like to ask you about a number of services provided by the City of Lake Forest's Community Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?*

FIGURE 27 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY

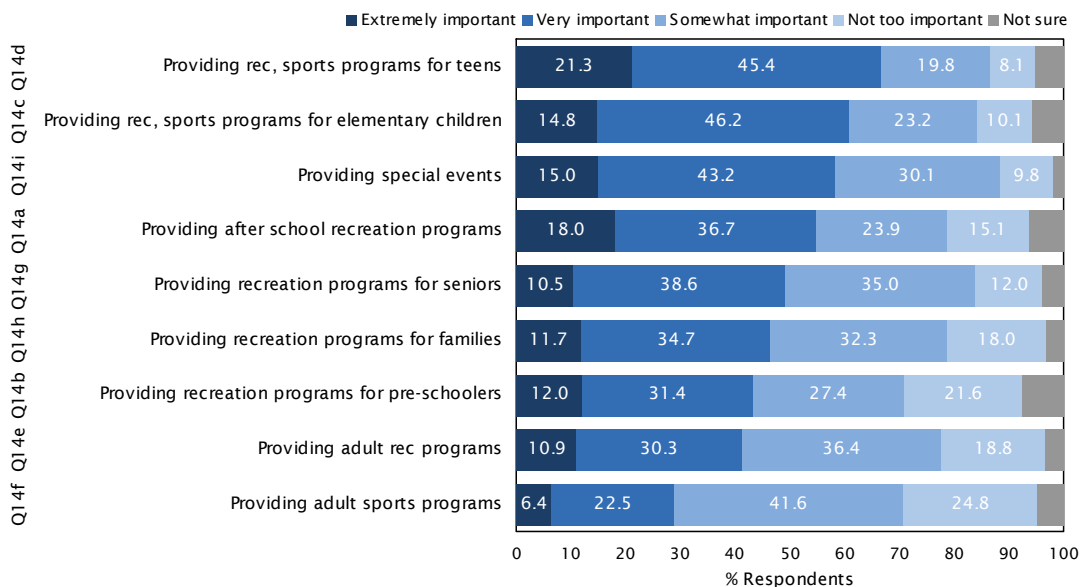


TABLE 12 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY (2006 ~ 2004)

	Study Year		Change in Extremely + Very Important
	2006	2004	
Providing rec, sports programs for teens	66.7	71.1	-4.4
Providing rec, sports programs for elementary children	61.0	69.0	-8.0
Providing special events	58.2	49.4	+8.9
Providing after school recreation programs	54.7	64.0	-9.3
Providing recreation programs for seniors	49.1	50.6	-1.5
Providing recreation programs for families	46.4	47.2	-0.7
Providing recreation programs for pre-schoolers	43.4	50.3	-7.0
Providing adult rec programs	41.2	N/A	N/A
Providing adult sports programs	28.9	N/A	N/A

When asked about their satisfaction with the same list of services (Figure 28), residents indicated that they were quite satisfied with every service tested—which is similar to the patterns found in other departments. Overall, residents expressed the greatest levels of satisfaction with respect to the Department’s efforts to provide special events (94%), followed by recreation and sports programs for elementary school-aged children (92%), and recreation programs for pre-schoolers (92%). Residents were somewhat less satisfied with the Department’s efforts to provide adult sports programs (83%) and recreation programs for families (88%), although even for these services satisfaction exceeded 80%. When compared to the results from 2004, the findings for 2006 were statistically similar (see Table 13).

Question 15: Resident Survey *Now I'd like to know how satisfied you are with the job the City of Lake Forest is doing to provide each of the services. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 28 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY

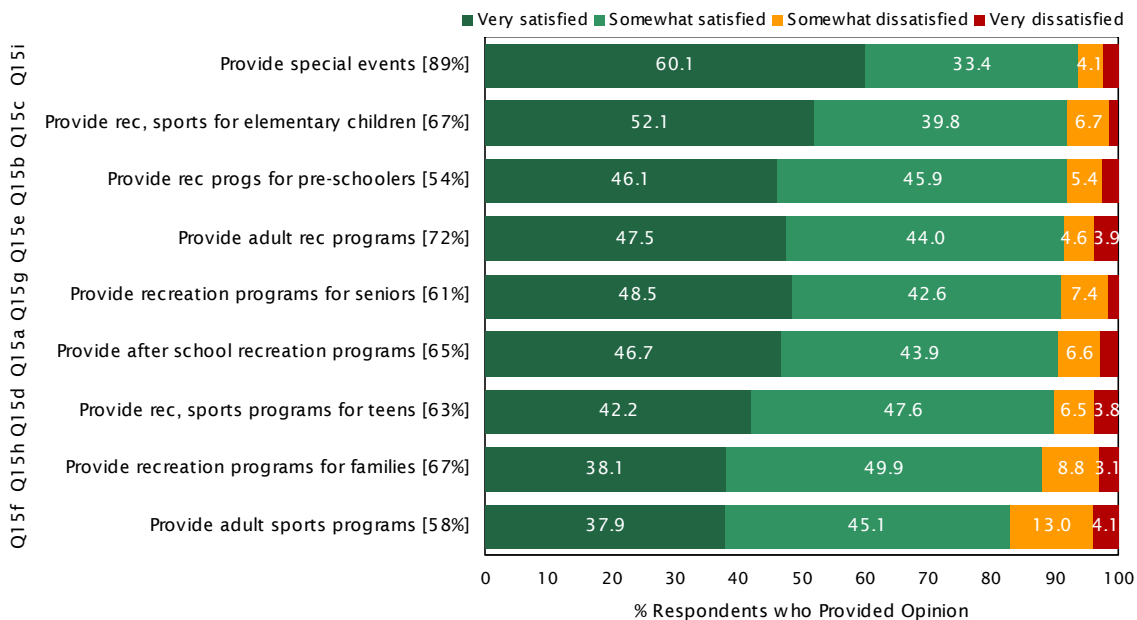


TABLE 13 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY (2006 ~ 2004)

	Study Year		Change in Satisfaction
	2006	2004	
Provide special events	93.5	95.1	-1.5
Provide rec, sports programs for elementary children	91.9	90.6	+1.3
Provide recreation programs for pre-schoolers	91.9	87.9	+4.0
Provide adult rec programs	91.5	N/A	N/A
Provide recreation programs for seniors	91.1	92.0	-0.9
Provide after school recreation programs	90.6	88.5	+2.0
Provide rec, sports programs for teens	89.7	90.2	-0.4
Provide recreation programs for families	88.0	91.5	-3.4
Provide adult sports programs	83.0	N/A	N/A

SPECIFIC SERVICES: BUSINESS SURVEY

Participants in the business survey were also asked to rate the importance of specific services offered by the City of Lake Forest, as well as indicate their level of satisfaction with the City’s current efforts to provide each service. Although some services appear in both the resident and business surveys—e.g., maintaining a low crime rate—the list of services that was tested with the business community was appropriately tailored to the audience and included services not tested with residents, such as providing business networking events and business consulting services. Because the list of services tested with the business community was considerably shorter than that used in the resident survey, the following figures present the results for services that span several departments.

Figure 29 provides the importance ratings assigned to each of the services tested in the first list—which can be loosely categorized as ‘general City services’. Overall, the business community rated maintaining a low crime rate (93%) as the most important of the services tested, followed by investigating criminal activity (87%) and promoting economic development (73%). At the other end of the spectrum, the business community viewed providing business education events (39%), free business consulting services (41%) and business networking events (41%) as comparatively less important. When compared to the 2004 results, the perceived importance of promoting redevelopment declined significantly, whereas the importance of building inspection services increased significantly (see Table 14).

Question 7: Business Survey *Now, I'm going to ask you about a number of specific services provided by the City of Lake Forest. For the following list of services, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?*

FIGURE 29 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY

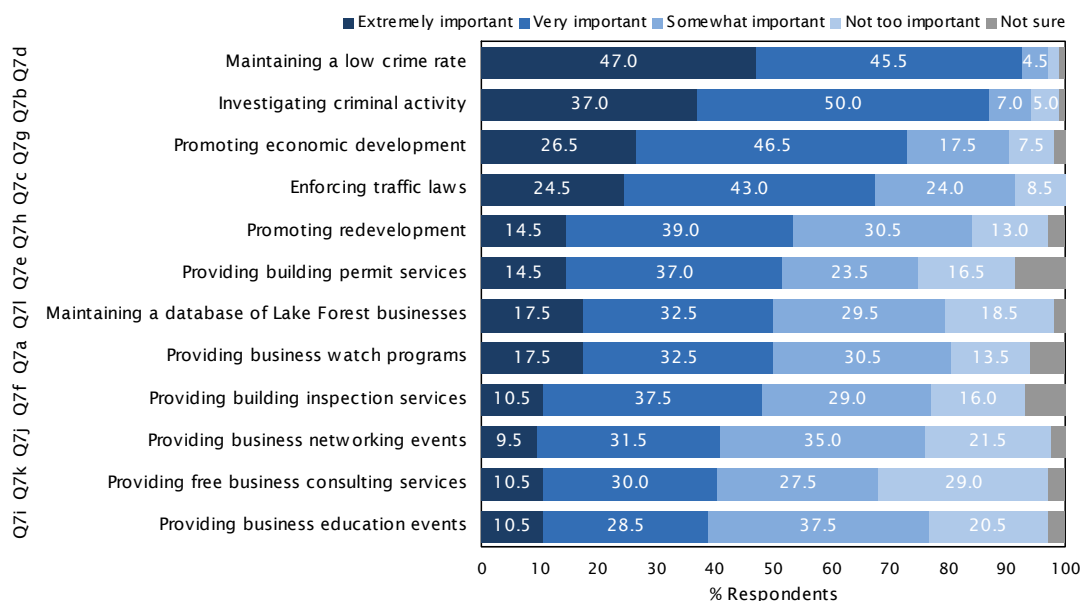


TABLE 14 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY (2006 ~ 2004)

	Study Year		Change in Extremely + Very Important
	2006	2004	
Maintaining a low crime rate	92.5	95.5	-3.0
Investigating criminal activity	87.0	88.0	-1.0
Promoting economic development	73.0	79.5	-6.5
Enforcing traffic laws	67.5	65.0	+2.5
Promoting redevelopment	53.5	64.5	-11.0†
Providing building permit services	51.5	46.5	+5.0
Providing business watch programs	50.0	47.0	+3.0
Maintaining a database of Lake Forest businesses	50.0	47.0	+3.0
Providing building inspection services	48.0	35.5	+12.5†
Providing business networking events	41.0	39.5	+1.5
Providing free business consulting services	40.5	36.5	+4.0
Providing business education events	39.0	39.0	+0.0

† Statistically significant change (p < 0.05) between the 2004 and 2006 studies.

When asked about their satisfaction with the same list of services, the business community indicated that they were quite satisfied with every service tested—which is similar to the patterns found in 2004 (see Figure 30 and Table 15). At the top of the satisfaction scale was maintaining a low crime rate (94%), providing building permit services (94%), and building inspection services (93%). At the opposite end of the scale, businesses were somewhat less satisfied with the City’s efforts to provide business education events (82%), business consulting services (82%), and business watch programs (83%).

Question 8: Business Survey *For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 30 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY

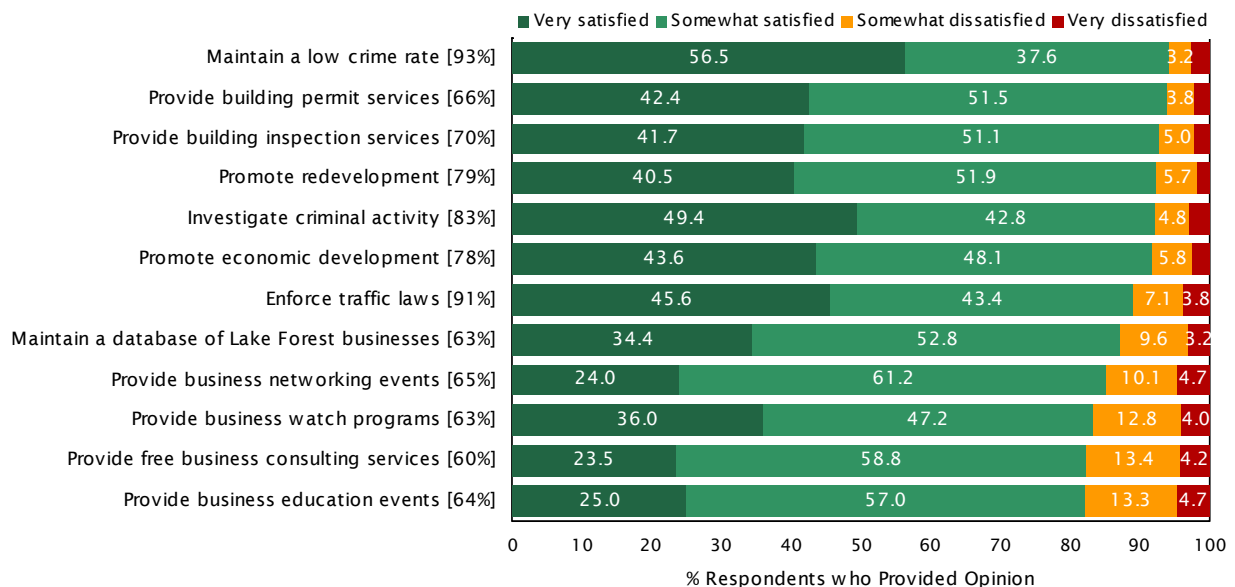


TABLE 15 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY (2006 ~ 2004)

	Study Year		Change in Satisfaction
	2006	2004	
Maintain a low crime rate	94.1	91.4	+2.6
Provide building permit services	93.9	89.8	+4.1
Provide building inspection services	92.8	90.2	+2.6
Promote redevelopment	92.4	90.7	+1.7
Investigate criminal activity	92.2	89.1	+3.1
Promote economic development	91.7	89.2	+2.5
Enforce traffic laws	89.0	91.0	-2.0
Maintain a database of Lake Forest businesses	87.2	88.7	-1.5
Provide business networking events	85.3	86.4	-1.1
Provide business watch programs	83.2	88.5	-5.3
Provide free business consulting services	82.4	89.3	-6.9
Provide business education events	82.0	89.2	-7.2

The second list of services, shown in Figure 31, relate mostly to maintaining and improving the City’s infrastructure. When asked to rate the importance that they assign to each of these services, the business community rated maintaining local streets and roads as most important (90%), followed by reducing traffic congestion (82%), and street sweeping (68%). Enforcing sign regulations (55%), enforcing architectural standards (57%), and enforcing zoning regulations (57%) were viewed as the least important services among those tested. The overall ratings were, once again, statistically similar to the results found in 2004 (see Table 16).

Question 9: Business Survey *Now I'm going to ask you about another series of specific services provided by the City. Again, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important. Here's the (first/next) one: ----- Do you think this service is extremely important, very important, somewhat important, or not too important?*

FIGURE 31 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY

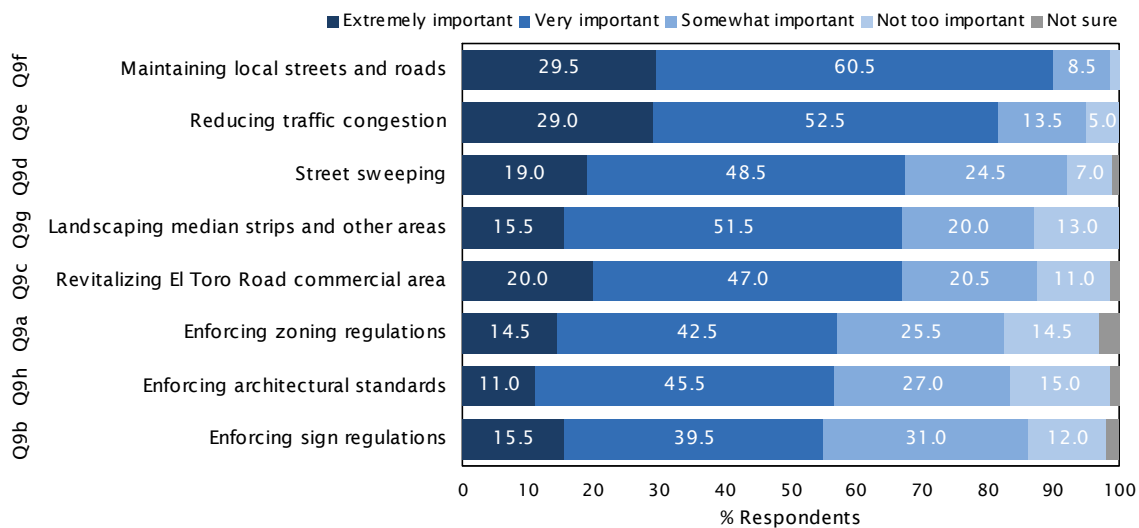


TABLE 16 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY (2006 ~ 2004)

	Study Year		Change in Extremely + Very Important
	2006	2004	
Maintaining local streets and roads	90.0	82.9	+7.1
Reducing traffic congestion	81.5	81.2	+0.3
Street sweeping	67.5	58.3	+9.2
Landscaping median strips and other areas	67.0	62.8	+4.2
Revitalizing El Toro Road commercial area	67.0	61.3	+5.7
Enforcing zoning regulations	57.0	50.7	+6.3
Enforcing architectural standards	56.5	N/A	N/A
Enforcing sign regulations	55.0	47.5	+7.5

Figure 32 presents the overall levels of satisfaction with the same list of infrastructure services. Once again, the satisfaction scores are all quite positive. Overall satisfaction was greatest with respect to the City’s efforts to provide street sweeping (94%), landscape medians and other public areas (94%), and enforce architectural standards (94%). Only one service—reducing traffic congestion—stood out with notably lower levels of overall satisfaction (74%). The findings for 2006 are statistically similar to those recorded in 2004 (see Table 16).

Question 10: Business Survey *Turning to your satisfaction with these same services, would you say that you are satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 32 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY

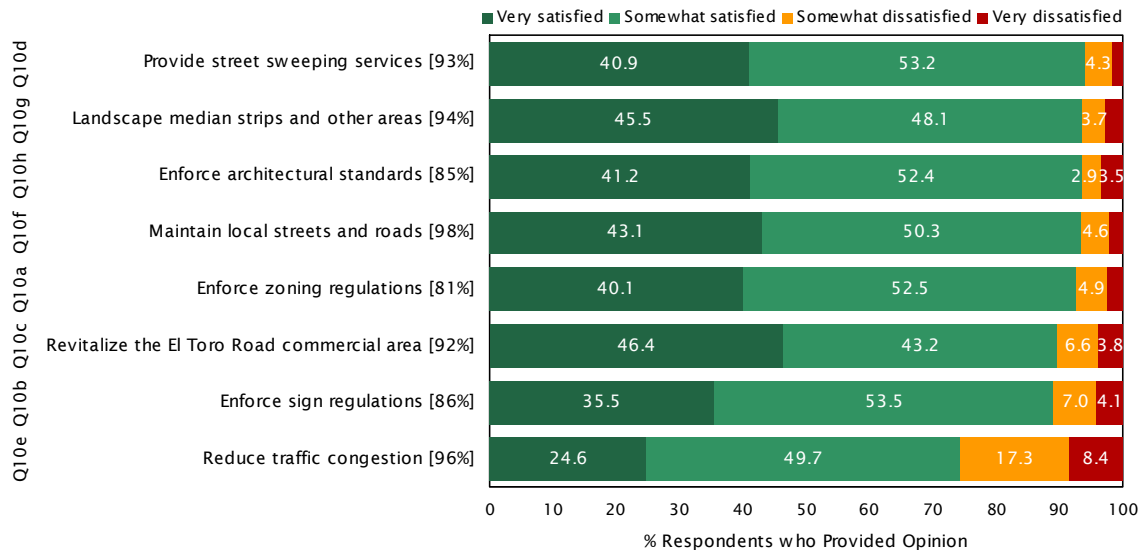


TABLE 17 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY (2006 ~ 2004)

	Study Year		Change in Satisfaction
	2006	2004	
Provide street sweeping services	94.1	92.2	+1.9
Landscape median strips and other areas	93.6	91.8	+1.8
Enforce architectural standards	93.5	N/A	N/A
Maintain local streets and roads	93.3	90.6	+2.7
Enforce zoning regulations	92.6	92.9	-0.3
Revitalize El Toro Road commercial area	89.6	80.3	+9.4
Enforce sign regulations	89.0	86.8	+2.1
Reduce traffic congestion	74.3	71.1	+3.3



PERFORMANCE NEEDS & PRIORITIES

With a measure of the importance of a service to respondents as well as a measure of respondents' satisfaction with the City's efforts to provide the service, True North is able to examine the relationship between these two dimensions and identify service areas where the City has the greatest opportunities to improve overall satisfaction—as well as identify for which services the City is meeting, and even exceeding, the vast majority of residents' and businesses' needs.

Rather than rely on sample *averages* to conduct this analysis, True North has developed and refined an *individualized* approach to identifying priorities that is built on the recognition that opinions will vary from resident to resident (and business to business), and that understanding this variation is required for assessing how well the City is meeting the needs of its constituents.⁴ Table 18 presents a two-dimensional space, or grid, based on the importance and satisfaction scales. The horizontal axis corresponds to the four *importance* response options, whereas the vertical scale corresponds to the four *satisfaction* response options. The 16 cells within the grid are grouped into one of six categories based on how well the City is meeting, or not meeting, a respondent's needs for a particular service. The six groups are as follows:

<i>Exceeding Needs</i>	The City is exceeding a respondent's needs if a respondent is satisfied and the level of expressed satisfaction is higher than the importance the respondent assigned to the service.
<i>Meeting Needs, Moderately</i>	The City is moderately meeting a respondent's needs if the respondent is satisfied and the level of satisfaction is commensurate with the level of importance assigned to the service.
<i>Meeting Needs, Marginally</i>	The City is marginally meeting a respondent's needs if the respondent is satisfied with the City's efforts to provide the service, but their level of satisfaction is lower than the level of importance assigned to the service.
<i>Not Meeting Needs, Marginally</i>	The City is marginally <i>not</i> meeting a respondent's needs if the respondent is somewhat dissatisfied, but the service is also viewed as just somewhat or not at all important.
<i>Not Meeting Needs, Moderately</i>	The City is moderately <i>not</i> meeting a respondent's needs if a) a respondent is very dissatisfied with the City's efforts to provide the service, but the service is viewed just somewhat or not at all important, or b) a respondent is somewhat dissatisfied and the service is viewed as very important.

4. Any tool that relies solely on the opinions of the average respondent will provide a limited and occasionally somewhat distorted picture of how well an agency is performing. The simple fact is that a city is not comprised of *average* residents or business professionals—it is comprised of unique individuals who will vary substantially in their opinions of the City's performance in different service areas. Thus, although the arithmetic average of these individuals' opinions is a useful statistic, it does not capture the variation in opinions that occurs among residents and business professionals, and it is this variation that is critical for truly assessing how well the City is meeting the needs of its constituents. This is why True North conducts the priority analysis at the individual respondent level, rather than at an aggregated level using the *average* of respondents' opinions.

Not Meeting Needs, Severely

The City is severely *not* meeting a respondent’s needs if a) a respondent is dissatisfied and the service is viewed as extremely important, or b) a respondent is very dissatisfied and the service is viewed as very important.

TABLE 18 NEEDS & PRIORITY MATRIX

		Importance			
		Not at all important	Somewhat important	Very important	Extremely important
Satisfaction	Very satisfied	Exceeding needs	Exceeding needs	Meeting needs, moderately	Meeting needs, moderately
	Somewhat satisfied	Exceeding needs	Meeting needs, moderately	Meeting needs, marginally	Meeting needs, marginally
	Somewhat dissatisfied	Not meeting needs, marginally	Not meeting needs, marginally	Not meeting needs, moderately	Not meeting needs, severely
	Very dissatisfied	Not meeting needs, moderately	Not meeting needs, moderately	Not meeting needs, severely	Not meeting needs, severely

Using this framework, True North categorized each respondent individually for each of the services tested in the study. Thus, for example, a respondent who indicated that maintaining a low crime rate was somewhat important and they were very satisfied with the City’s efforts in this service area would be categorized in the *exceeding needs* group for this service. The same respondent may be grouped in the *marginally not meeting needs* group for another service—e.g., maintaining local streets and roads—if they were somewhat dissatisfied with the City’s efforts to provide the service, but the service was viewed as only somewhat important.

Figure 33 presents each of the 31 services tested with residents, along with the percentage of residents who were grouped into each of the six possible categories. Figure 34 provides the same information for the 20 services tested with the business community. For ease of interpretation, the color-coding in both figures is consistent with that presented in Table 18. Thus, for example, in the service area of reducing traffic congestion on City streets, the City is exceeding the needs of 4% of residents, moderately meeting the needs of 30% of residents, marginally meeting the needs of 36% of residents, marginally not meeting the needs of 0% of residents, moderately not meeting the needs of 10% of residents, and severely not meeting the needs of 19% of residents.

Perhaps the most important pattern that is shown in both figures is that—for the majority of services tested—the City is meeting the needs of at least 90% of residents and businesses. Moreover, for all but one service—reducing traffic congestion—the City is meeting the needs of at least 80% of residents and businesses.

Operating from the management philosophy that—all other things being equal—the City should focus on improving those services that have the highest percentage of respondents for which the City is currently *not* meeting their needs, the services have been sorted in rank order of priority.

Thus, reducing traffic congestion is the top priority for residents, followed by providing adult sports programs, neighborhood watch programs, and recreation programs for families (Figure 33). Among the business community, the top priorities are reducing traffic congestion, followed by providing business education events, free business consulting services, business watch programs, and business networking events (Figure 34).

FIGURE 33 SERVICE NEEDS: RESIDENT SURVEY

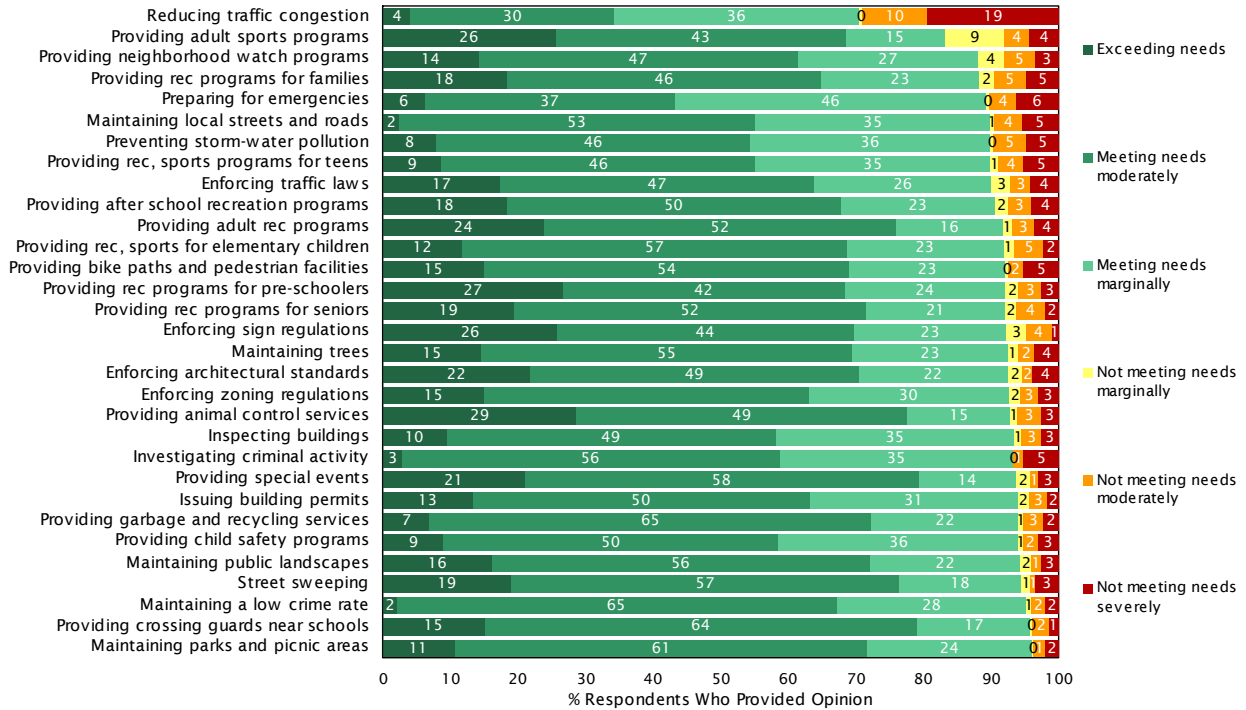
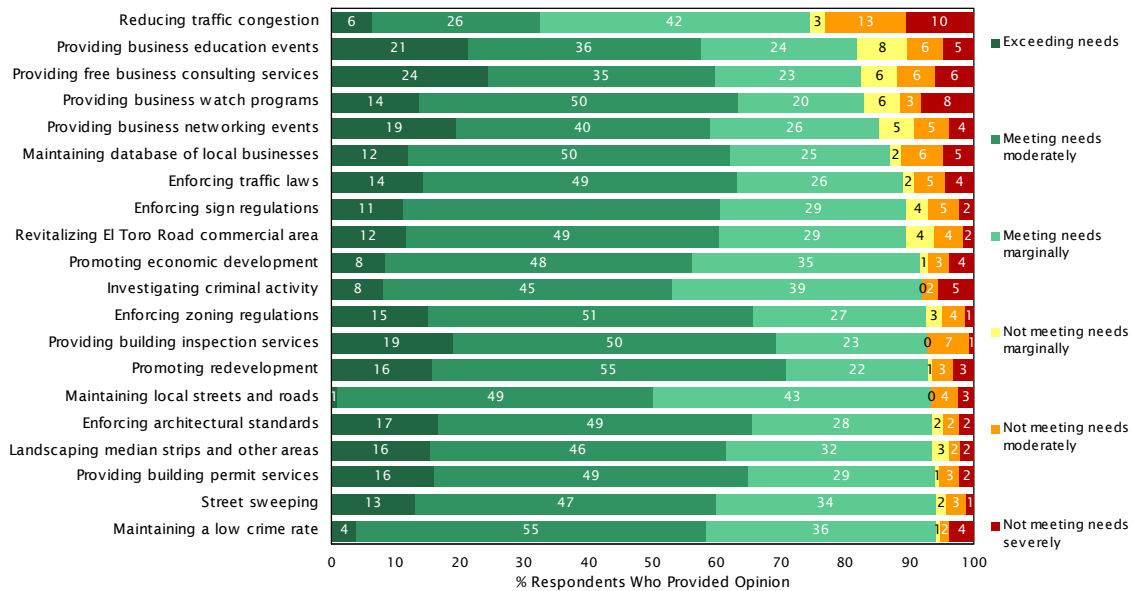


FIGURE 34 SERVICE NEEDS: BUSINESS SURVEY



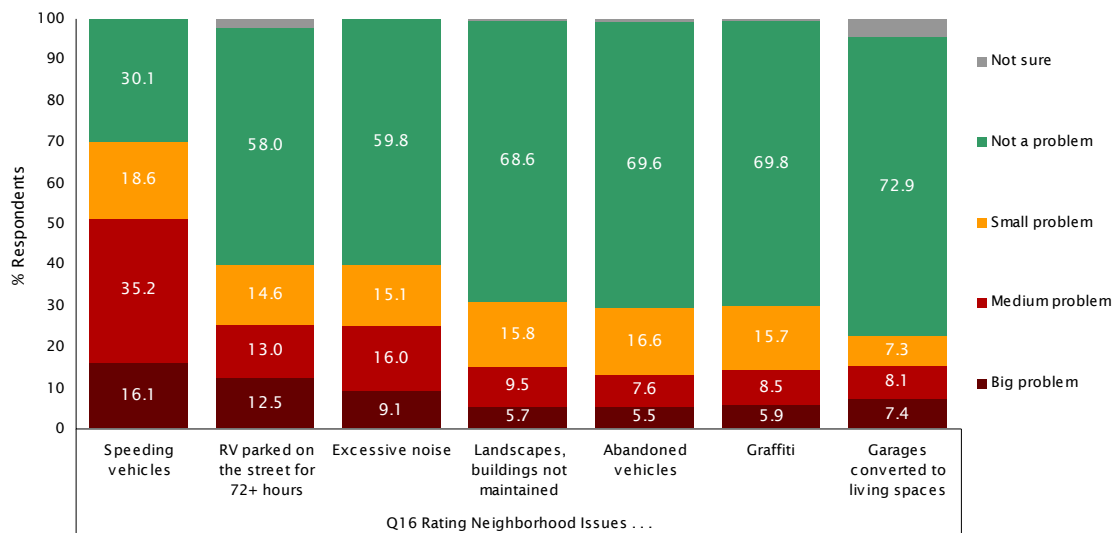
NEIGHBORHOOD ISSUES

Research has shown that personal fear of crime and perceptions of safety can be influenced by factors that—although they are not directly related to crime—when present in a community are suggestive of an unsafe environment. Graffiti, unkempt yards and excessive noise, for example, are problems that can lead a resident to feel that their neighborhood is not safe. These and other issues—such as recreational vehicles being parked on streets and garage conversions—can also negatively impact property values and the perceived quality of life in an area.

Accordingly, the survey presented residents and businesses with each of the issues shown on the bottom of Figures 35 (Resident) and 36 (Business) and asked—for each—whether the issue is a big problem, moderate problem, small problem, or not a problem in their neighborhood or the area surrounding their business, respectively.

Question 16: Resident Survey *As I read the following issues, please indicate whether each issue is a big problem, a moderate problem, a small problem, or not a problem in your neighborhood.*

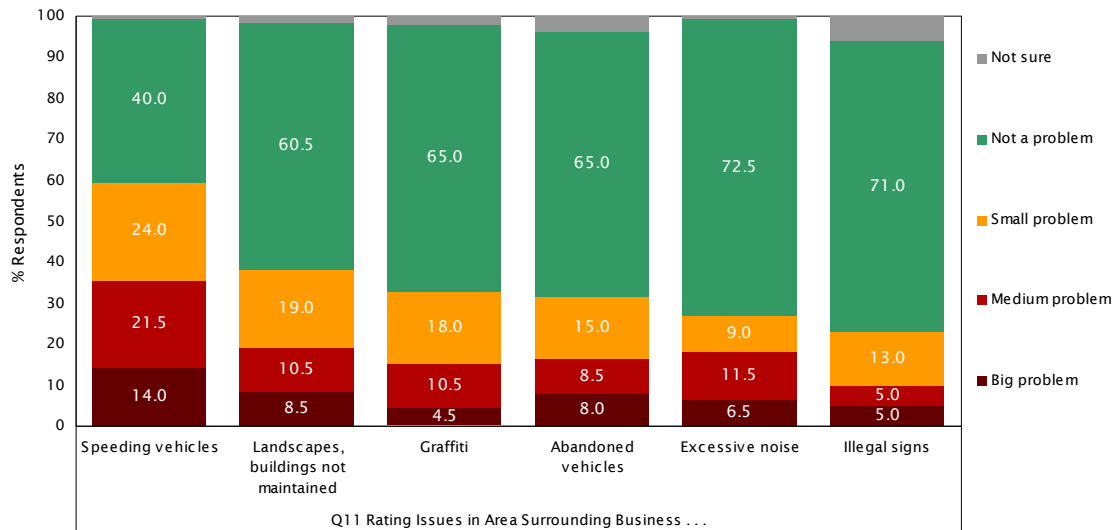
FIGURE 35 RATING LOCAL ISSUES: RESIDENT SURVEY



The most commonly perceived neighborhood problem among those tested for residents and the business community was speeding vehicles, being mentioned by more than half of residents (51%) and one-third of businesses (36%) as at least a moderate problem. Among residents, recreation vehicles parked on the street for more than 72 hours at a time (26%) and excessive noise (25%) rounded-out the top three most prevalent problems. For the business community, landscapes not being properly maintained (19%), graffiti (15%), abandoned vehicles (17%) and excessive noise (18%) had similar percentages of respondents indicating that these issues were at least moderate problems in their area.

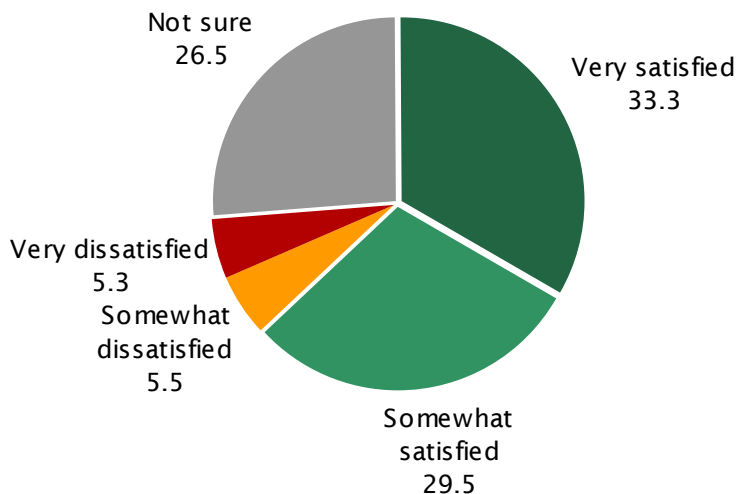
Question 11: Business Survey As I read the following issues, please indicate whether each issue is a big problem, a moderate problem, a small problem, or not a problem in the area surrounding your business location in Lake Forest.

FIGURE 36 RATING LOCAL ISSUES: BUSINESS SURVEY



CODE ENFORCEMENT Respondents were next informed that the City has created codes to address and prevent a variety of issues that can affect a neighborhood or commercial area, including illegal parking, abandoned vehicles, non-permitted construction, junk storage and unkempt yards for neighborhoods, and property maintenance, outdoor storage, and the use of temporary signs and banners for commercial areas. They were then asked if, in general, they are satisfied or dissatisfied with the City’s efforts to *enforce* code violations, or if they do not have an opinion on the matter.

FIGURE 37 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY

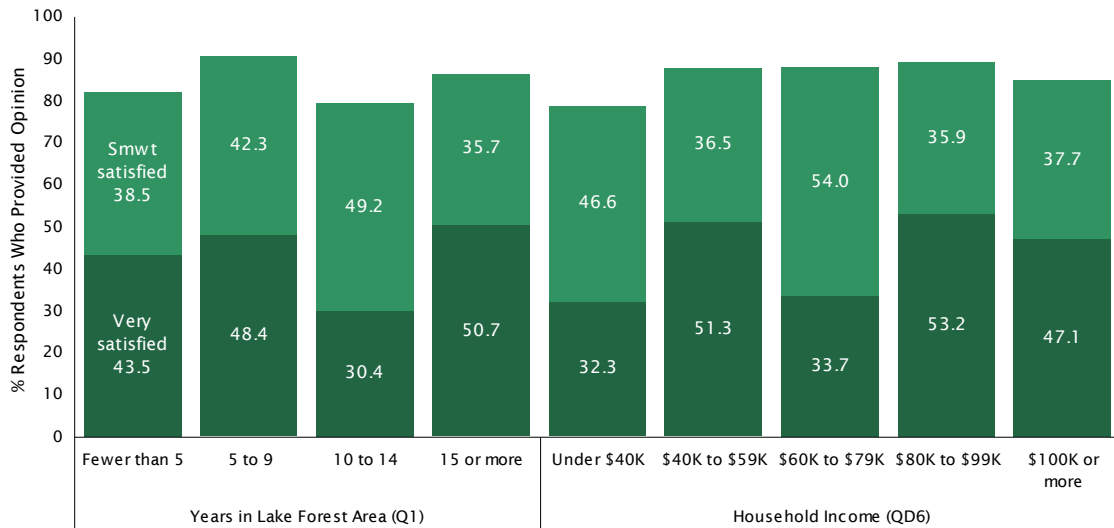


Question 17: Resident Survey

The City of Lake Forest has created codes to address a variety of issues that can affect a neighborhood, such as illegal parking, abandoned vehicles, non-permitted construction, junk storage and properties not being properly maintained. Overall, are you satisfied or dissatisfied with the City's efforts to enforce code violations, or do you not have an opinion?

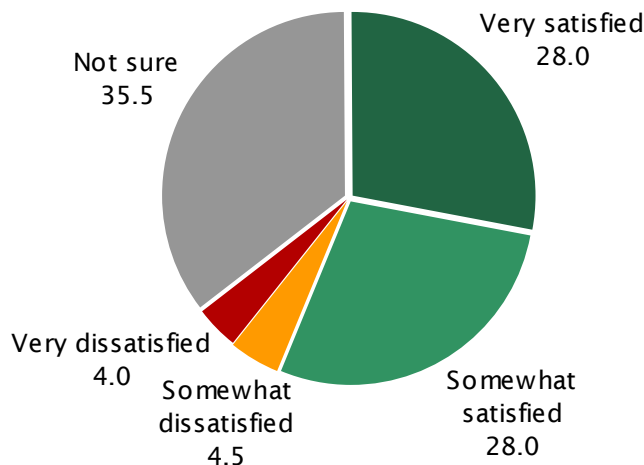
Figure 37 shows that among residents, 27% did not have an opinion regarding the City’s code enforcement efforts. Of those with an opinion, approximately 11% were dissatisfied with City’s efforts in this respect, whereas the remaining respondents were either very (33%) or somewhat (30%) satisfied with the City’s code enforcement efforts. Figure 38—which recalculates the percentages among just those with an opinion—shows that respondent satisfaction with the City’s code enforcement efforts exceeded 75% regardless of length of residence or annual household income.

FIGURE 38 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA & HOUSEHOLD INCOME



Just over one-third (36%) of Lake Forest business professionals also indicated that they did not have an opinion regarding the City’s code enforcement efforts. Among those with an opinion, however, the tone was decidedly positive (Figure 39). Fifty-six percent (56%) of respondents indicated that they were satisfied, whereas less than 9% stated that they were dissatisfied. Figure 40 presents the satisfaction ratings among just those with an opinion by key business subgroups.

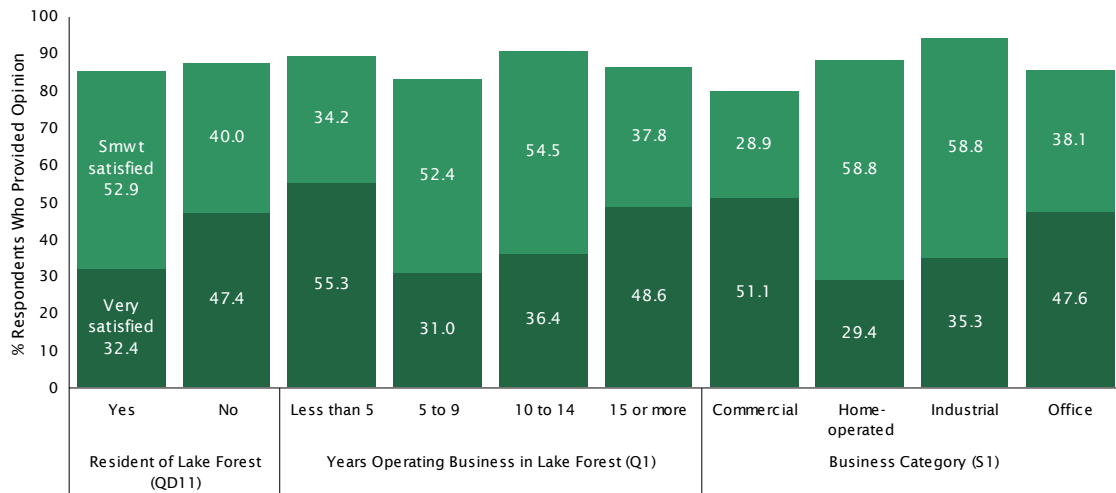
FIGURE 39 SATISFACTION WITH CODE ENFORCEMENT: BUSINESS SURVEY



Question 12: Business Survey

The City of Lake Forest has created codes to address a variety of issues that can affect commercial areas, such as property maintenance, outdoor storage, and the use of temporary signs and banners. Overall, are you satisfied or dissatisfied with the City's efforts to enforce code violations, or do you not have an opinion?

FIGURE 40 SATISFACTION WITH CODE ENFORCEMENT: BUSINESS SURVEY BY RESIDENT OF LAKE FOREST, YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY



Question 18: Resident Survey *Is there a particular issue or code violation that the City isn't addressing that leads you to be dissatisfied?*

Question 13: Business Survey *Is there a particular issue or code violation that the City isn't addressing that leads you to be dissatisfied?*

For the small percentage of respondents who expressed dissatisfaction with the City's code enforcement efforts, the survey provided them with an open-ended opportunity to describe the particular issue or code violation that the City isn't addressing that is the cause of their dissatisfaction. Because so few respondents indicated that they were dissatisfied, however, the results do not warrant a separate graphic. The issues mentioned were pollution control / environmental concerns, housing issues, graffiti, speeding vehicles, and illegally parked vehicles.

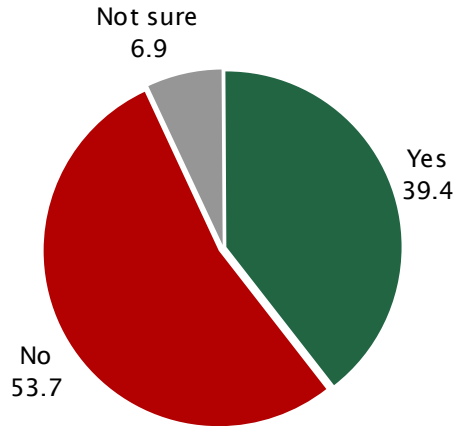
STREET SWEEPING The 2004 survey included several questions regarding street sweeping that focused on gauging residents' and local businesses' support for a policy change that would prohibit parking on a street once per week for several hours in order to improve the effectiveness of street sweeping. Initial support for the policy change was high among residents (69%) and the business community (82%). Moreover, many respondents who initially opposed the policy changed their position once they were informed that street sweeping reduces storm-water pollution.⁵

The 2006 survey sought to gather additional background information from residents and businesses about the perceived effectiveness of current street sweeping efforts and the extent to which parked cars interfere with street sweeping. As shown in Figures 41 and 42, 39% of residents and 16% of businesses reported that parked cars on their street tend to prevent street sweepers from adequately cleaning the street.

5. Combining the answers to both questions yielded 83% support for the policy change among residents and 95% support among the business community. In other words—a near mandate!

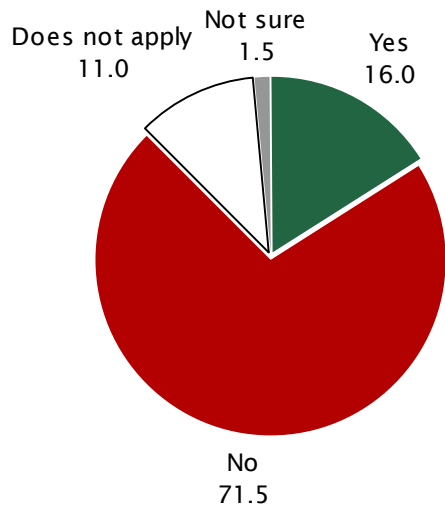
Question 19: Resident Survey *Street-sweepers clean the public streets and gutters in Lake Forest every week. In many areas of the City, however, the street sweepers aren't able to effectively clean the streets due to parked cars. Thinking of the street that you live on, do parked cars tend to prevent the street sweepers from adequately cleaning your street?*

FIGURE 41 STREET SWEEPING PROBLEMS: RESIDENT SURVEY



Question 14: Business Survey *Street-sweepers clean the public streets and gutters in Lake Forest every week. In many areas of the City, however, the street sweepers aren't able to effectively clean the streets due to parked cars. Thinking of the street that your business is located on, do parked cars tend to prevent the street sweepers from adequately cleaning your street?*

FIGURE 42 STREET SWEEPING PROBLEMS: BUSINESS SURVEY



REDEVELOPMENT OF EL TORO

In the past several years, the City and the Lake Forest Redevelopment Agency have played an active role in redeveloping and revitalizing outdated commercial areas along El Toro Road by adding traffic lanes, improving intersections, coordinating traffic signals, and providing better landscaping and access to the shopping centers. A rejuvenated El Toro Road was designed to provide a thriving, accessible shopping corridor and create a "main street" for the city. The revitalization of the corridor will give area residents an attractive and convenient shopping district, while providing both economic growth and greatly improved traffic patterns. This section of the report presents the results of several questions asked of residents and/or local businesses regarding the revitalization of El Toro Road.

HAVE YOU VISITED THE NEW SHOPPING CENTERS? Residents and businesses were first asked whether—in the three months prior the interview—they had visited or driven by the new Orchard and Home Depot Shopping Centers built along El Toro Road. The vast majority of residents (86%) and business professionals (72%) reported that they had visited the shopping Centers during this period (see Figures 43 and 45, respectively). When compared to their respective counterparts, residents who enjoy family incomes in excess of \$60,000 and those over the age of 29 were slightly more likely to have visited the shopping centers (see Figure 44).

Question 20: Resident Survey *In the past three months, have you visited or driven by the new Orchard and Home Depot Shopping Centers built along El Toro Road that replaced the former K-Mart Center and Saddleback Valley Plaza?*

FIGURE 43 DRIVEN PAST OR VISITED NEW SHOPPING CENTERS IN PAST THREE MONTHS: RESIDENT SURVEY

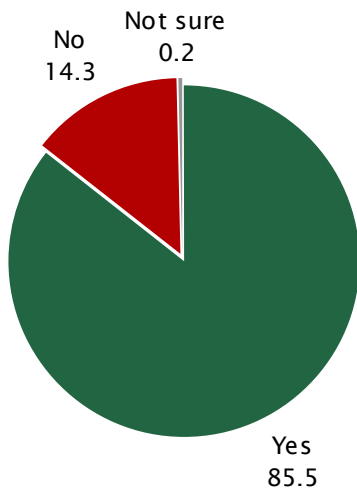
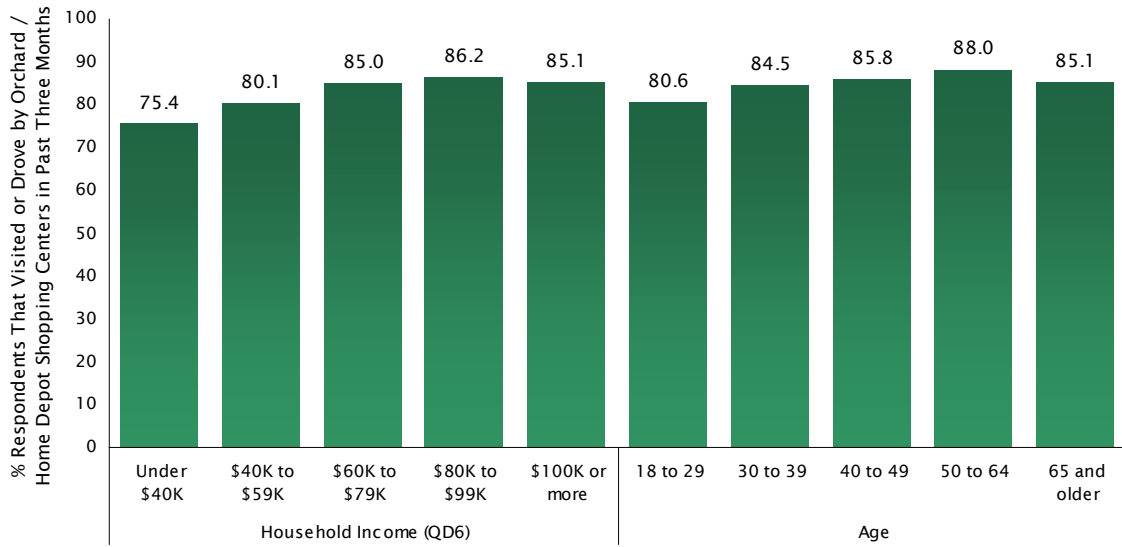
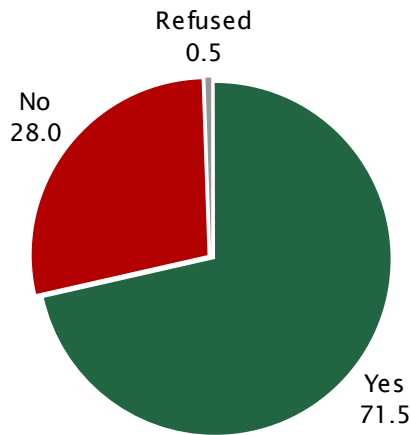


FIGURE 44 DRIVEN PAST OR VISITED NEW SHOPPING CENTERS IN PAST THREE MONTHS: RESIDENT SURVEY BY HOUSEHOLD INCOME & AGE



Question 15: Business Survey *In the past three months, have you visited or driven by the new Orchard and Home Depot Shopping Centers built along El Toro Road that replaced the former K-Mart Center and Saddleback Valley Plaza?*

FIGURE 45 DRIVEN PAST OR VISITED NEW SHOPPING CENTERS IN PAST THREE MONTHS: BUSINESS SURVEY



APPEARANCE Respondents who had visited the revitalized shopping centers along El Toro Road were next asked to rate the appearance of the centers using a five point scale of excellent, good, fair, poor or very poor. As shown in Figure 46, residents provided very positive assessments of the appearance of the new shopping centers, with more than half (51%) rating it as excellent and an additional one-third (33%) rating it as good. Just 6% responded with fair, and less than 5% used poor or very poor to describe the appearance of the new centers. For the interested reader, Figures 47 and 48 display how the appearance ratings varied by key resident sub-groups.

Question 21: Resident Survey How would you rate the appearance of the new shopping centers? Would you say it is excellent, good, fair, poor or very poor?

FIGURE 46 RATING APPEARANCE OF NEW SHOPPING CENTERS: RESIDENT SURVEY

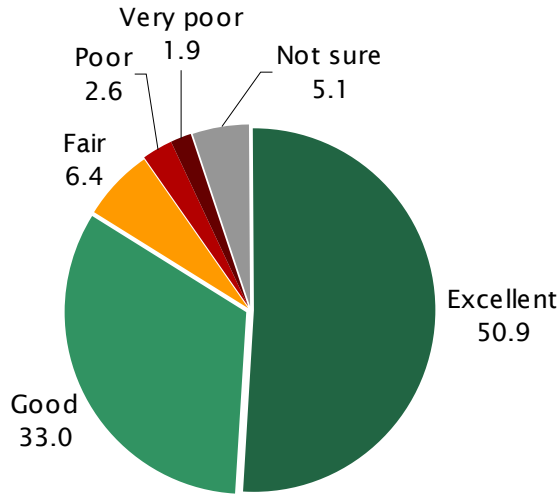


FIGURE 47 RATING APPEARANCE OF NEW SHOPPING CENTERS: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, EMPLOYMENT STATUS & GENDER

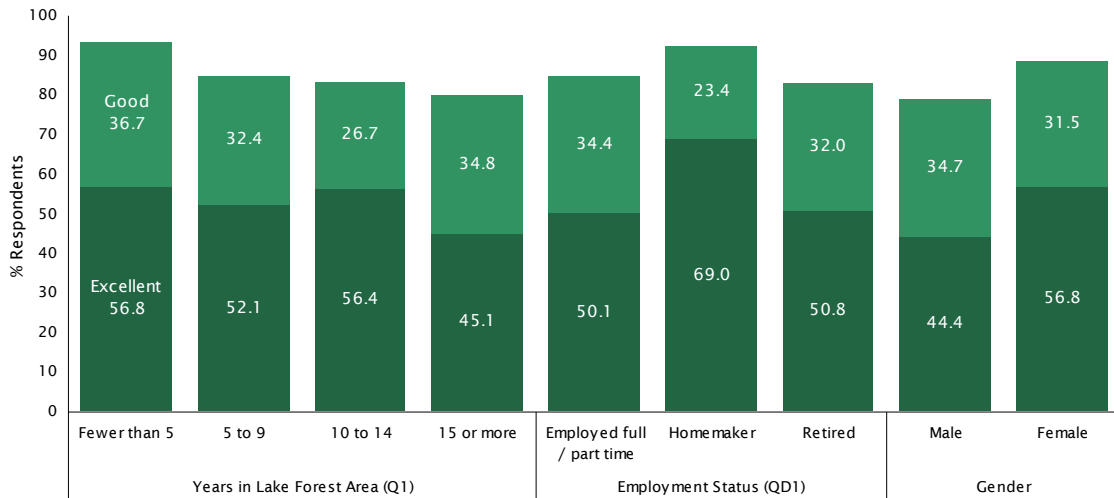
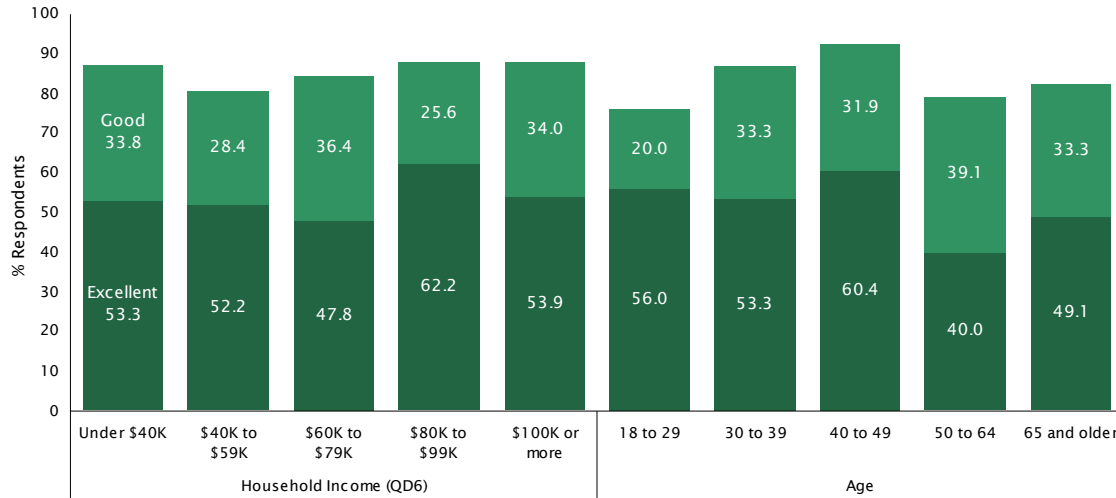


FIGURE 48 RATING APPEARANCE OF NEW SHOPPING CENTERS: RESIDENT SURVEY BY HOUSEHOLD INCOME & AGE



Local business professionals were similarly enthusiastic about the appearance of the new shopping centers along El Toro Road, with 51% describing it as excellent and 36% rating it as good. Just 6% responded with fair, and less than 4% used poor or very poor to describe the appearance of the new centers. Figure 50 on the next page shows how ratings of the appearance of the new shopping centers varied by whether the individual was a resident of Lake Forest, their gender, the number of years that their business has operated in the City, and the type of business.

Question 16: Business Survey *How would you rate the appearance of the new shopping centers? Would you say it is excellent, good, fair, poor or very poor?*

FIGURE 49 RATING APPEARANCE OF NEW SHOPPING CENTERS: BUSINESS SURVEY

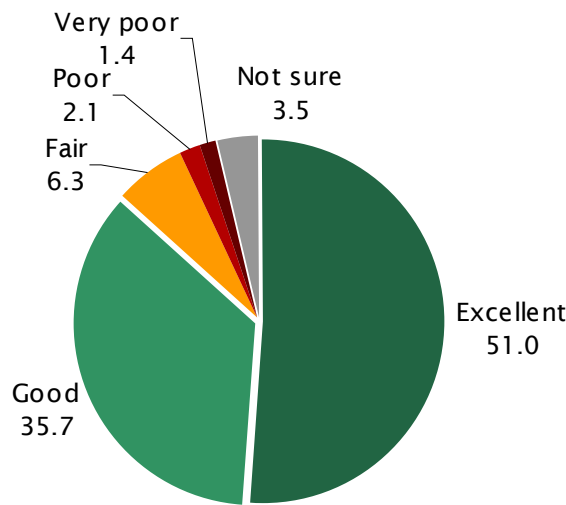
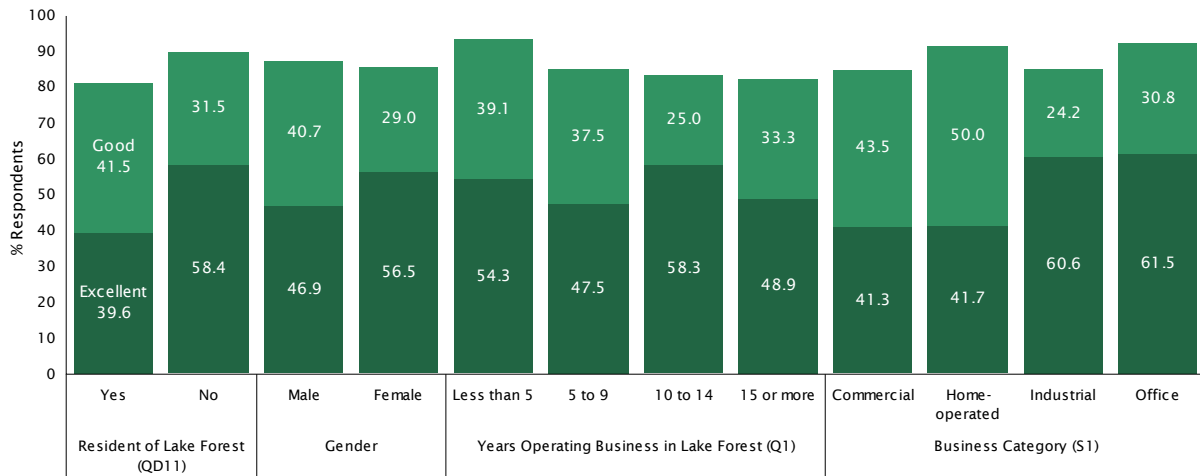


FIGURE 50 RATING APPEARANCE OF NEW SHOPPING CENTERS: BUSINESS SURVEY BY RESIDENT OF LAKE FOREST, GENDER, YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY



ROLE OF CITY AND REDEVELOPMENT AGENCY The final question in this series was designed to gauge whether residents and the local business community support or oppose the City of Lake Forest and the Lake Forest Redevelopment Agency playing an active role in helping to redevelop and revitalize older, outdated commercial areas in the City. As shown in Figures 51 and 53, both residents and the business community strongly support public investment in the revitalization of the City’s commercial areas. Overall, 85% of residents and 87% of businesses supported the City’s and Agency’s continued involvement in redeveloping and revitalizing outdated commercial areas. For the interested reader, Figure 52 shows how opinions about public investment in the redevelopment of commercial areas varied by subgroups of residents, whereas Figures 54 and 55 provide similar information for local business professionals.

Question 22: Resident Survey *Do you think the City of Lake Forest or Lake Forest Redevelopment Agency should play an active role in helping to redevelop and revitalize older, outdated commercial areas in the City?*

FIGURE 51 FEEL REDEVELOPMENT AGENCY SHOULD PLAY ROLE IN REVITALIZING AREAS OF CITY: RESIDENT SURVEY

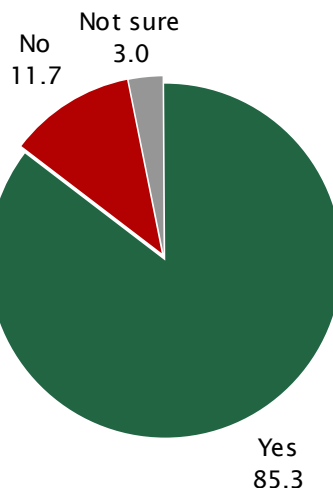
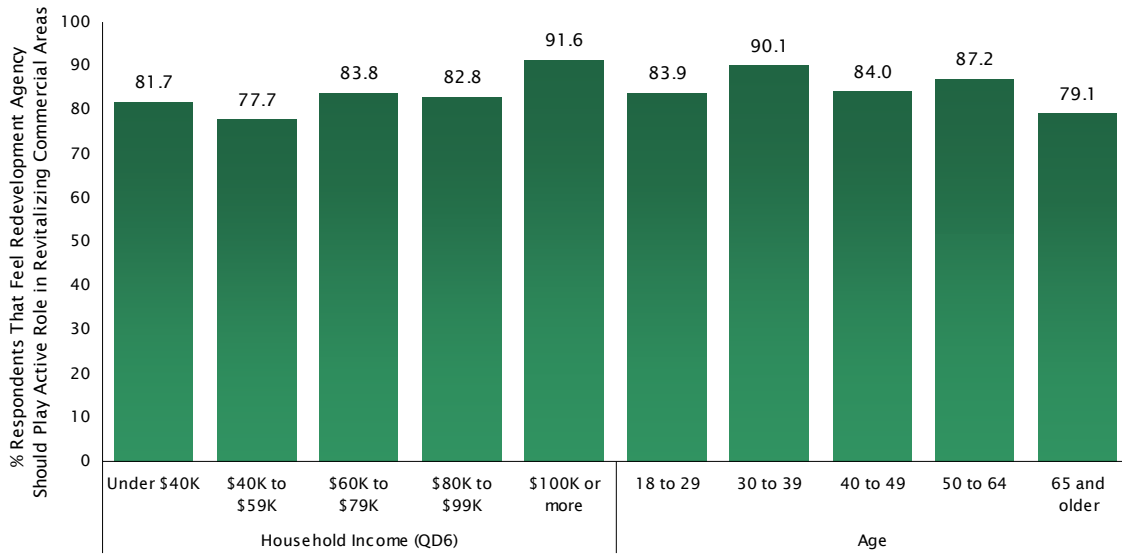


FIGURE 52 FEEL REDEVELOPMENT AGENCY SHOULD PLAY ROLE IN REVITALIZING AREAS OF CITY: RESIDENT SURVEY BY HOUSEHOLD INCOME & AGE



Question 17: Business Survey *Do you think the City of Lake Forest or Lake Forest Redevelopment Agency should play an active role in helping to redevelop and revitalize older, outdated commercial areas in the City?*

FIGURE 53 FEEL REDEVELOPMENT AGENCY SHOULD PLAY ROLE IN REVITALIZING AREAS OF CITY: BUSINESS SURVEY

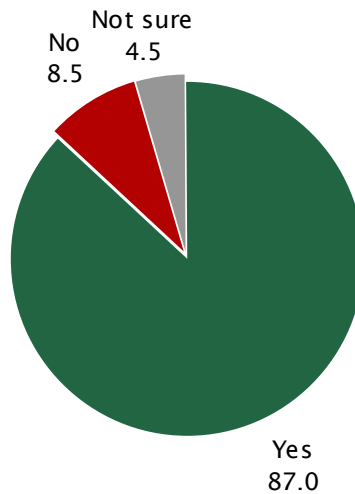


FIGURE 54 FEEL REDEVELOPMENT AGENCY SHOULD PLAY ROLE IN REVITALIZING AREAS OF CITY: BUSINESS SURVEY BY NUMBER OF EMPLOYEES, RESIDENT OF LAKE FOREST & GENDER

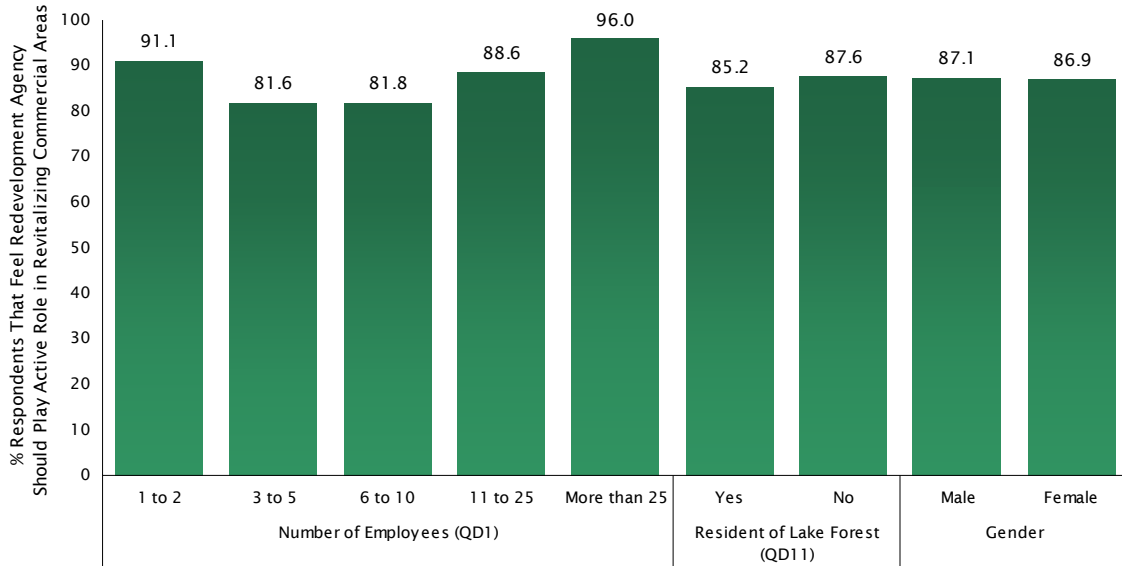
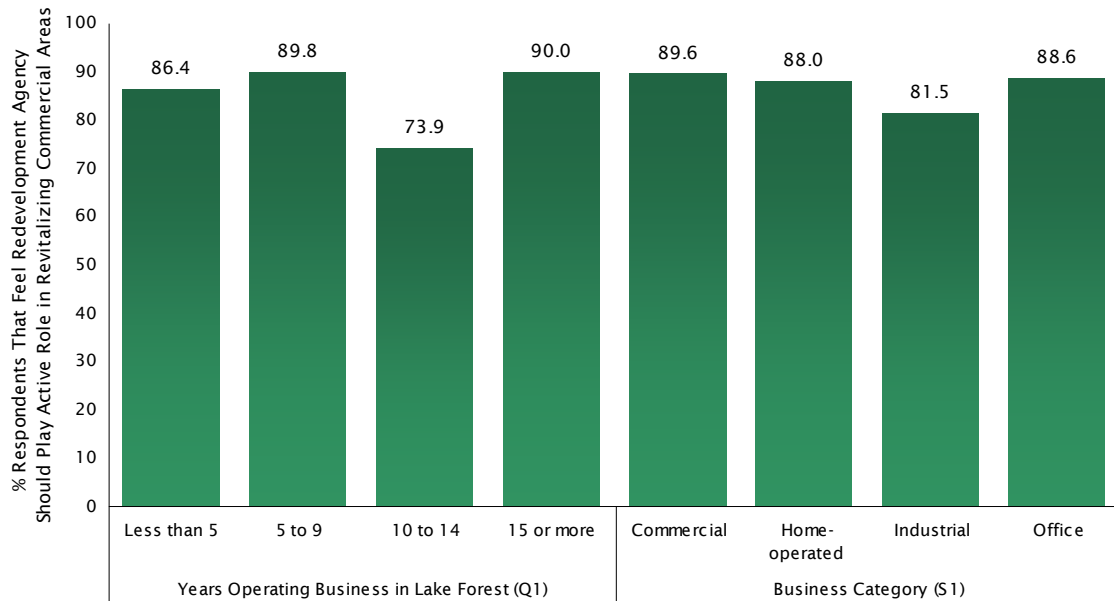


FIGURE 55 FEEL REDEVELOPMENT AGENCY SHOULD PLAY ROLE IN REVITALIZING AREAS OF CITY: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY



COMMUNICATION

The importance of City communication with residents and local businesses cannot be overstated. Much of a city's success is shaped by the quality of information that is exchanged in both directions, from the City to the community and from the community to the City. This study is just one example of Lake Forest's efforts to enhance the information flow to the City to better understand the community's concerns, perceptions, and needs. Some of Lake Forest's many efforts to communicate with its residents and local business community include its newsletters, timely press releases, street banners, and its various websites.

SATISFACTION WITH COMMUNICATION EFFORTS Both residents and businesses were asked to report their overall satisfaction with the City's efforts to communicate with them through newsletters, the Internet, and other means. Overall, 81% of residents indicated that they were either very (48%) or somewhat (33%) satisfied with the City's communication efforts, which is similar to the ratings received in prior surveys (Figure 56). When compared to their respective counterparts, satisfaction was highest among those who had resided in the City between 5 and 9 years, those with household incomes between \$80,000 and \$99,999 per year, females, residents between 40 and 49 years of age, and home owners (see Figures 57 and 58).

Question 23: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, and other means?*

FIGURE 56 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY (2006 ~ 2000)

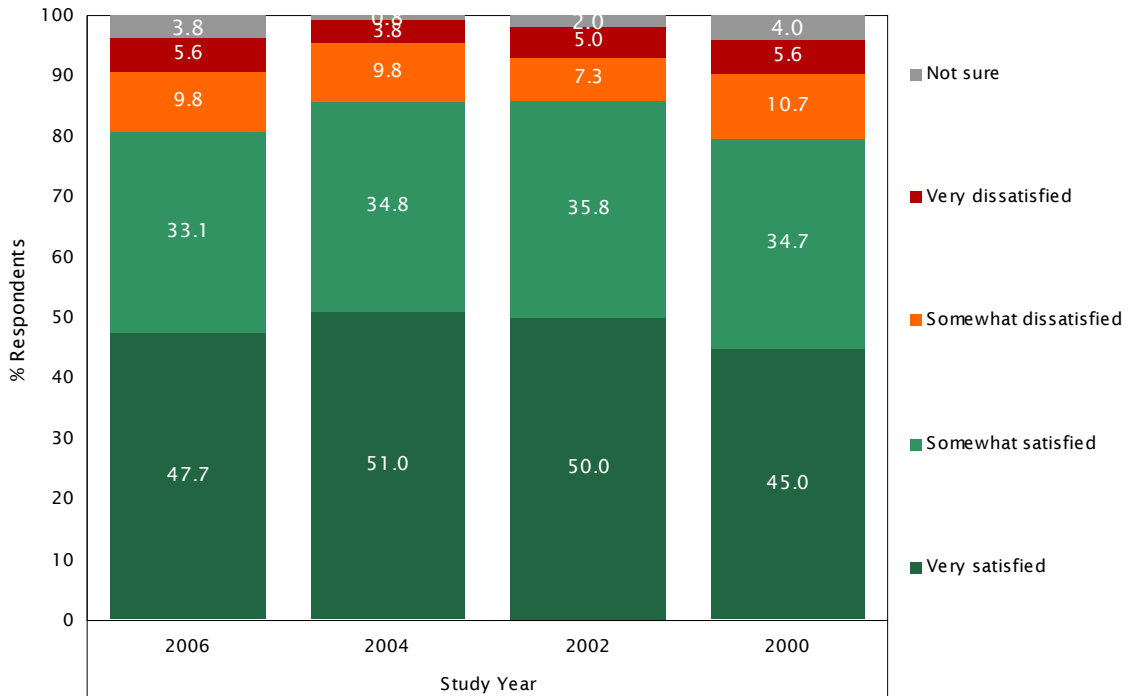


FIGURE 57 SATISFACTION WITH COMMUNICATION: RESIDENT SATISFACTION BY YEARS IN LAKE FOREST AREA, CHILD IN HOME & HOUSEHOLD INCOME

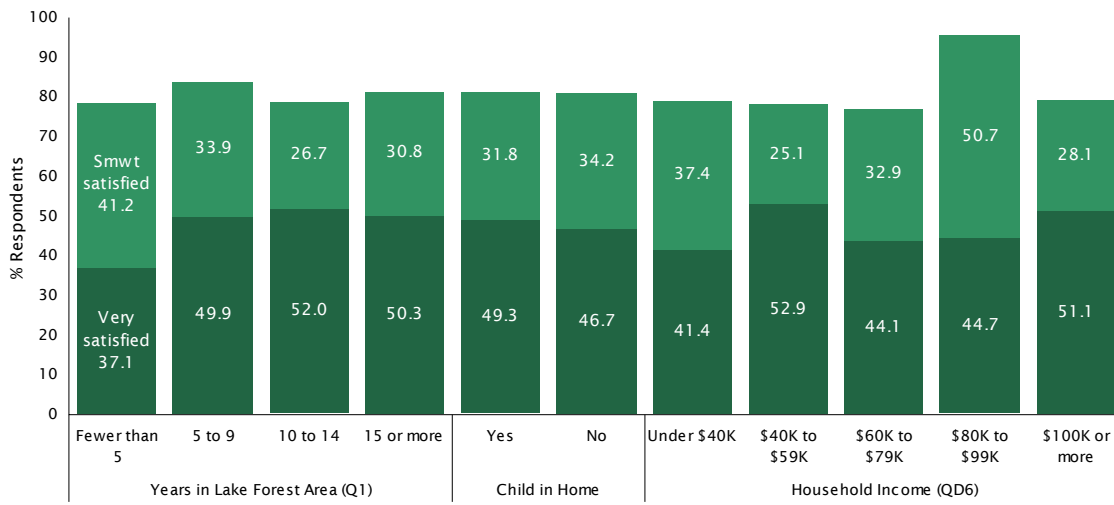
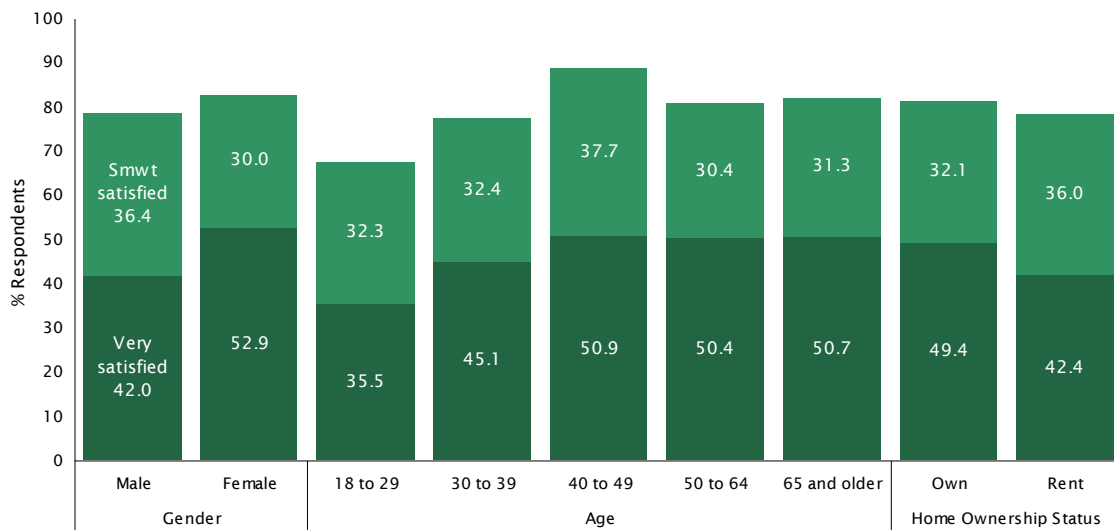


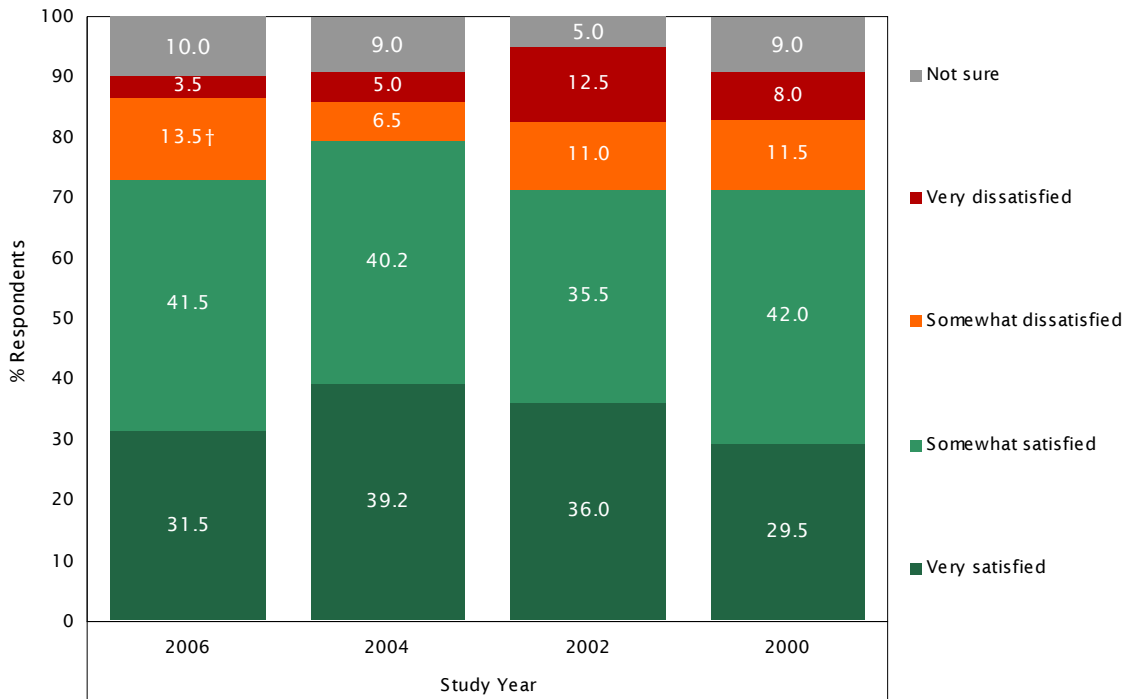
FIGURE 58 SATISFACTION WITH COMMUNICATION: RESIDENT SATISFACTION BY GENDER, AGE & HOME OWNERSHIP STATUS



Among local businesses, the levels of satisfaction with the City’s communication efforts were also similar to prior surveys, with 73% indicating that they were satisfied and 17% indicating that they were dissatisfied (Figure 59). Figures 60 and 61 show how overall satisfaction varied among key business subgroups.

Question 18: Business Survey *Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, and other means?*

FIGURE 59 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY (2006 ~ 2000)



† Statistically significant change (p < 0.05) between the 2004 and 2006 studies.

FIGURE 60 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY NUMBER OF EMPLOYEES, RESIDENT OF LAKE FOREST & GENDER

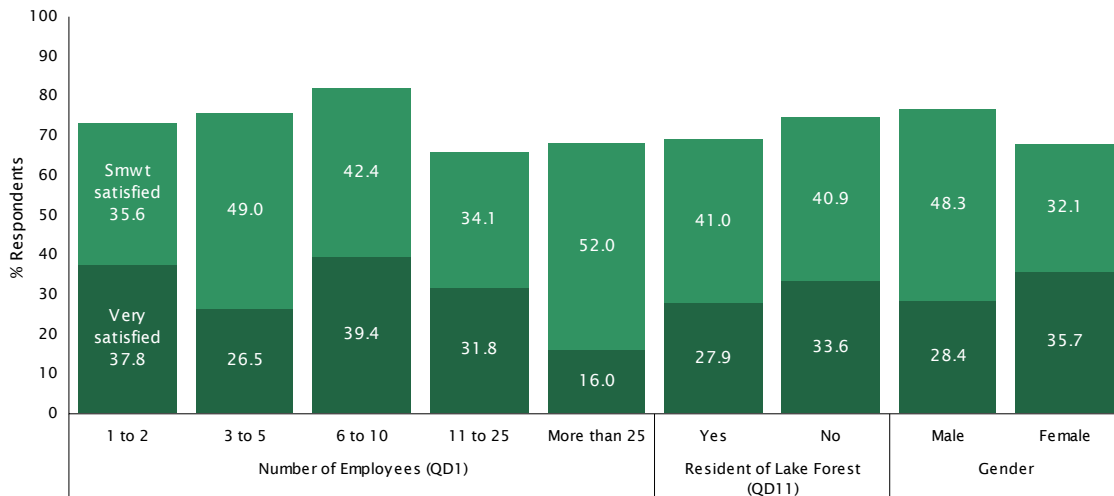
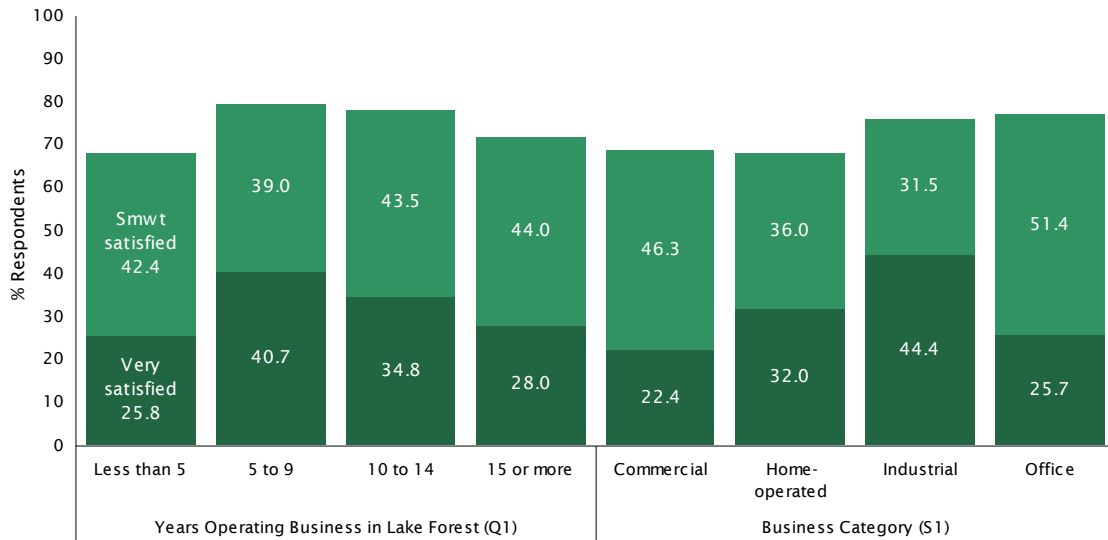


FIGURE 61 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY



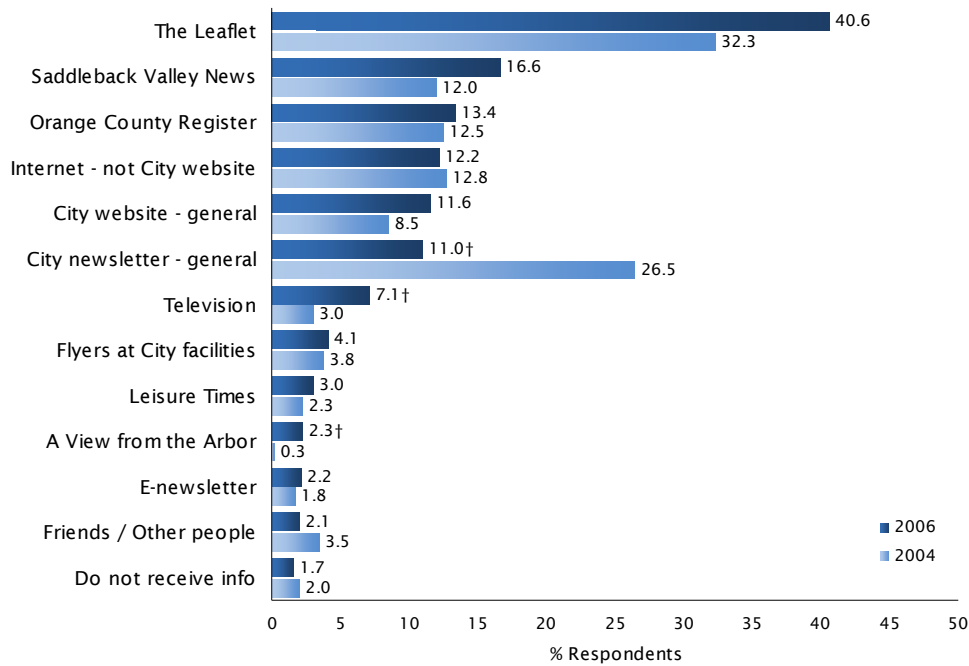
INFORMATION SOURCES Residents and businesses were also asked to indicate which information sources they use to find out about City of Lake Forest news, information, and programming. This question was asked in an open-ended format and respondents were allowed to report up to two sources of information. Thus, the percentages shown in the following figures reflect the percentage of residents and business professionals, respectively, who mentioned a given information source. For comparison, the results of the 2004 survey (light blue) for this question are presented alongside those for 2006 (dark blue) in Figures 62 and 63.

The most frequently cited source of information for City news among residents in 2006 was the City’s newsletter, mentioned by name (*The Leaflet*) by 41% of respondents and referred to in general (the City’s newsletter) by an additional 11% of residents (Figure 62). Other sources that were mentioned by at least 10% of residents included the *Saddleback Valley News* (17%), *Orange County Register* (13%), the Internet in general (12%), and the City’s websites (12%). When compared to the 2004 survey results, awareness of the name of the City’s newsletter (*The Leaflet*) continued an increasing trend which began in 2002.

Members of the business community were most likely to mention the *Orange County Register* (20%) in response to Question 19, followed by the City’s newsletter -- generally (9%) and by its name *The Leaflet* (16%) -- and the Internet in general (14%). When compared to the 2004 study, the proportion of business professionals who mentioned the *Orange County Register* was significantly greater, whereas the proportion who mentioned the City’s Newsletter generally was significantly lower. It is also worth noting that there was a statistically significant decline in the proportion of respondents who indicated that they do not receive information about and/or from the City (Figure 63).

Question 24: Resident Survey *What information sources do you use to find out about City of Lake Forest news, information and programming?*

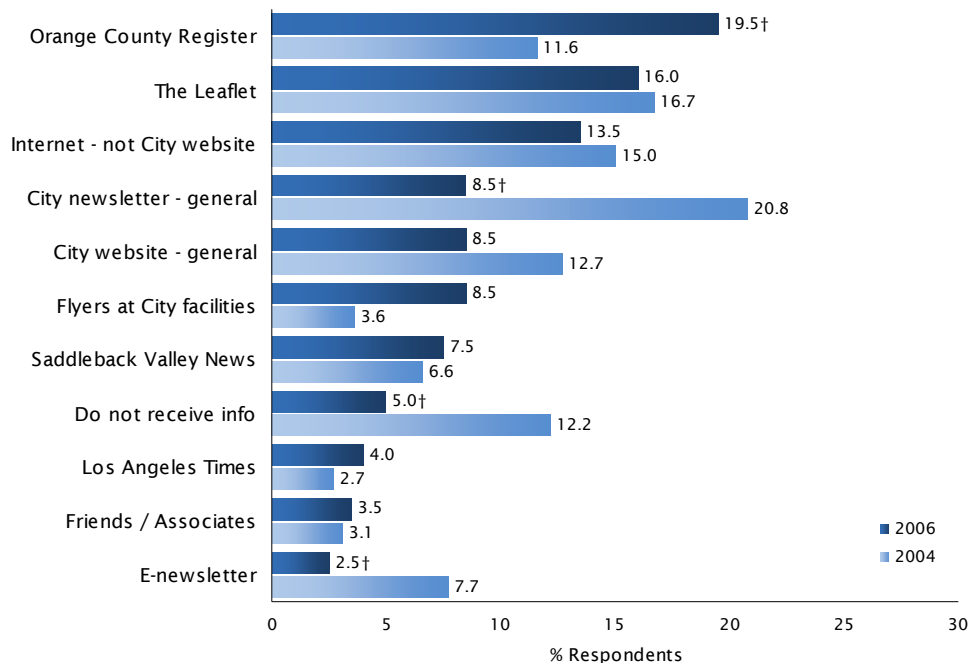
FIGURE 62 INFORMATION SOURCES: RESIDENT SURVEY (2006 ~ 2004)



† Statistically significant change ($p < 0.05$) between the 2004 and 2006 studies.

Question 19: Business Survey *What information sources does your business use to find out about City of Lake Forest news, information and programming?*

FIGURE 63 INFORMATION SOURCES: BUSINESS SURVEY (2006 ~ 2004)



† Statistically significant change ($p < 0.05$) between the 2004 and 2006 studies.

ONLINE FEATURES AND SERVICES The final question in the communication series first informed respondents that the City is considering adding a number of online features and services. Respondents were then presented with each of the services shown at the bottom of Figure 64 (Residents) and Figure 66 (Businesses), respectively, and asked whether they would use each service if it were made available.

As shown in Figure 64, anticipated use of the services by residents ranged dramatically depending on the services tested. Online registration for recreation programs (80%), an interactive map of the City that shows points of interest including parks, shopping centers and commercial properties (78%), online document retrieval for permits, agendas, records and other materials (70%), and the ability to pay for City services online (55%) were popular with at least half of those surveyed. At the other end of the spectrum, less than half of respondents anticipated watching streamed City Council meetings (37%) and using information kiosks and electronic signs that provide news, current events and other City-related information (50%).

For the interested reader, Figure 65 shows how anticipated use of the various online services and features varied by respondent age.

Question 25: Resident Survey *The City of Lake Forest is considering adding a number of online features and services. As I read each of the following, please tell me whether you would use the service if it were made available.*

FIGURE 64 USE OF PROPOSED ONLINE SERVICES: RESIDENT SURVEY

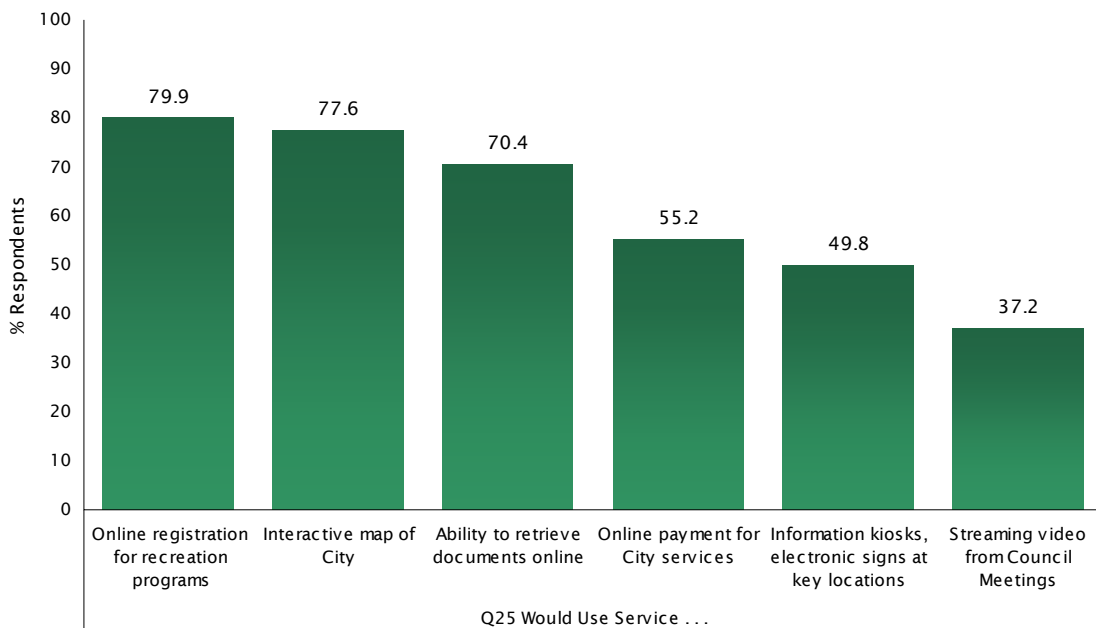
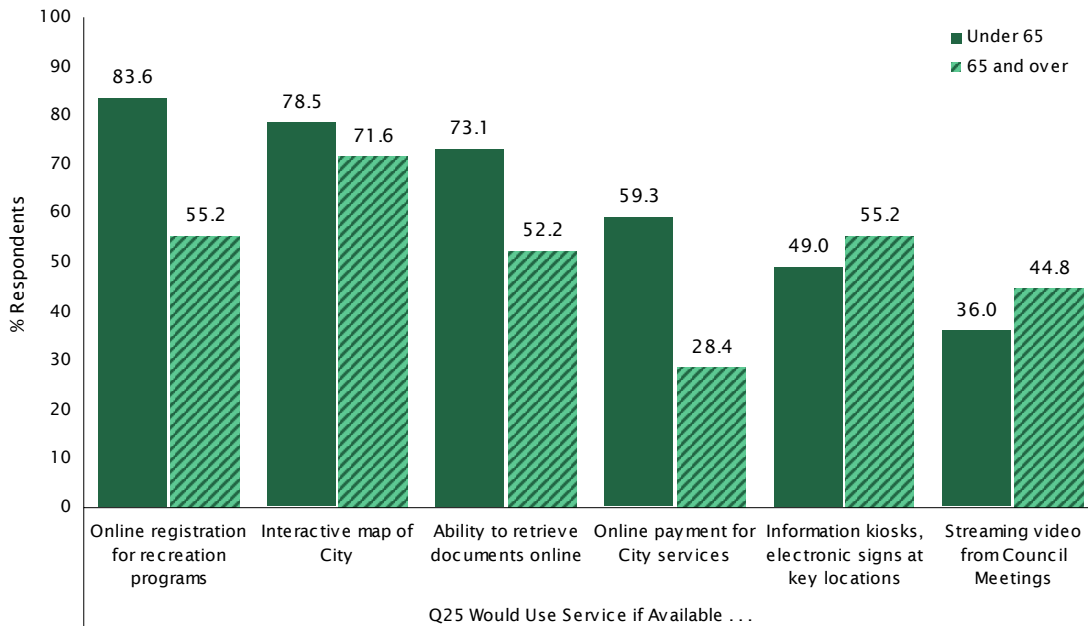


FIGURE 65 USE OF PROPOSED ONLINE SERVICES: RESIDENT SURVEY BY AGE



When compared to residents, business professionals were somewhat less likely to anticipate using each of the services identified in this question. The most popular services were interactive maps of the City (66%) and the ability to retrieve documents online (65%), followed by online bill paying (53%), information kiosks and signs (40%), and streamed City Council meetings (27%). Figure 67 displays how anticipated use of these services varied according to whether the respondent had visited the City’s website in the 12 months prior to the interview.

Question 20: Business Survey *The City of Lake Forest is considering adding a number of online features and services. As I read each of the following, please tell me whether your business would use the service if it were made available.*

FIGURE 66 USE OF PROPOSED ONLINE SERVICES: BUSINESS SURVEY

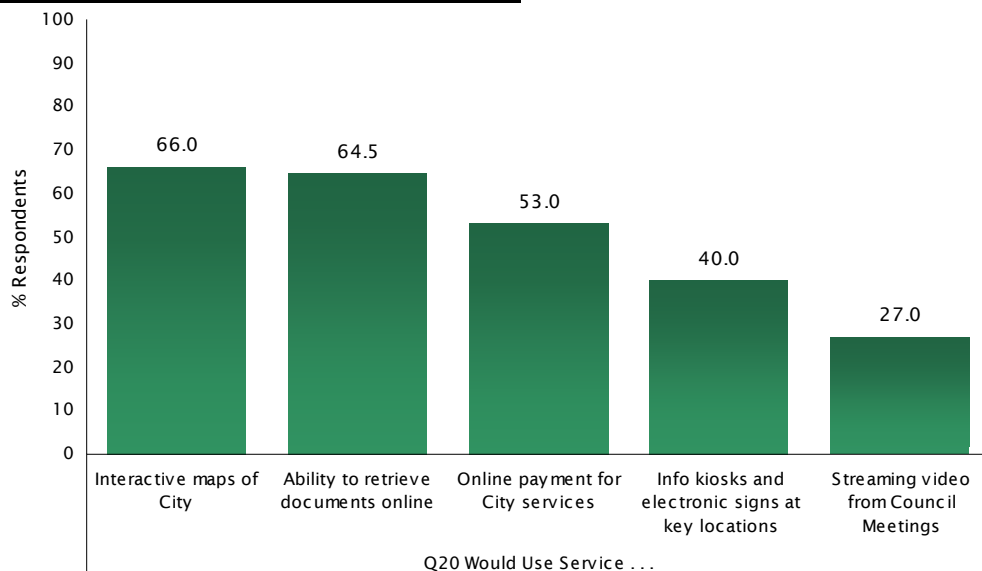
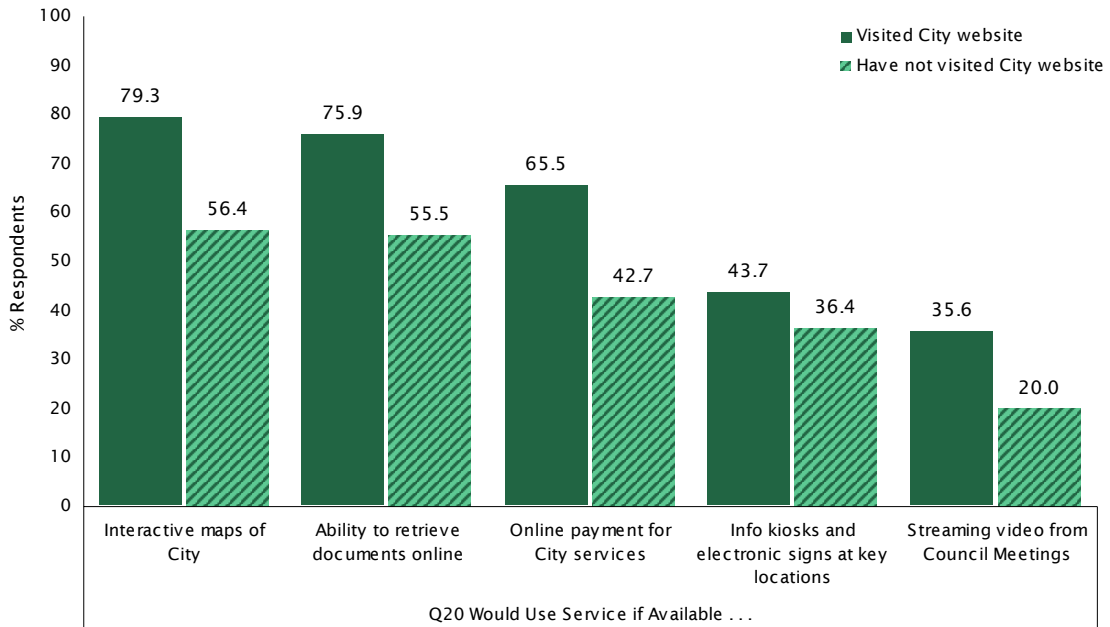


FIGURE 67 USE OF PROPOSED ONLINE SERVICES: BUSINESS SURVEY BY VISITED CITY WEBSITE IN PAST YEAR



CITY WEBSITES

When asked in Questions 24 and 19 what information sources they turn to for information about City news, events and programming, residents and businesses were expected to mention the sites they turn to most often—not necessarily all of the sites they use. Because the City of Lake Forest has been a leader among municipalities in developing websites tailored to different sub-groups in the community, it was naturally of interest to specifically measure resident and business use of the City’s websites, as well as their opinions regarding the content of the sites.

USE OF WEBSITES The first question in this series simply asked each respondent whether they had visited one or more of the City’s websites in the 12 months prior to the interview. Figure 68 shows that, among residents, the proportion who had visited the City’s website has grown substantially over time. At the extremes, 45% of residents indicated that they had visited the sites in 2006, whereas just 18% reported that they had done so in 2000. Moreover, as shown in Figures 69 and 70, visiting the City’s websites was strongly related to certain resident characteristics, including length of residence, employment status, the presence of a child in the home, whether they live in an HOA, household income and age.

Question D4: Resident Survey *Have you visited the City of Lake Forest's websites in the past year?*

FIGURE 68 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY (2006 ~ 2000)

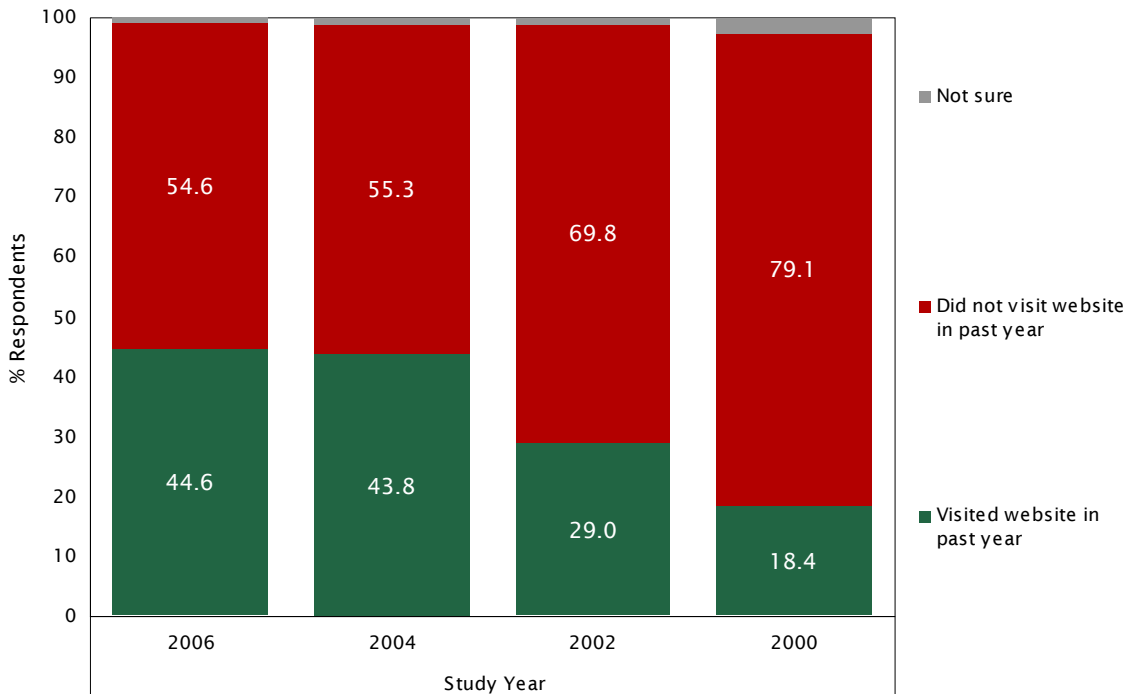


FIGURE 69 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST, EMPLOYMENT STATUS, CHILD IN HOME & LIVE IN HOA

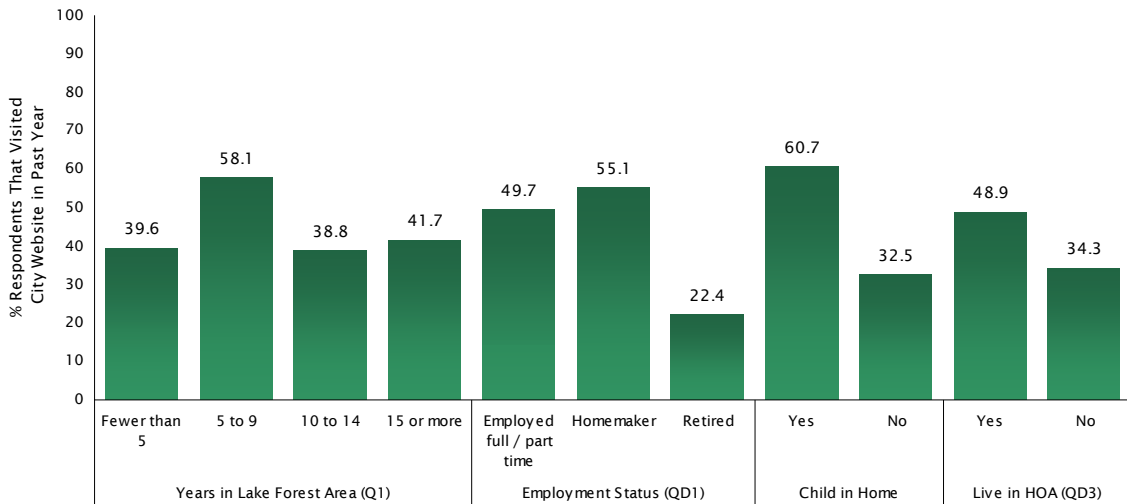
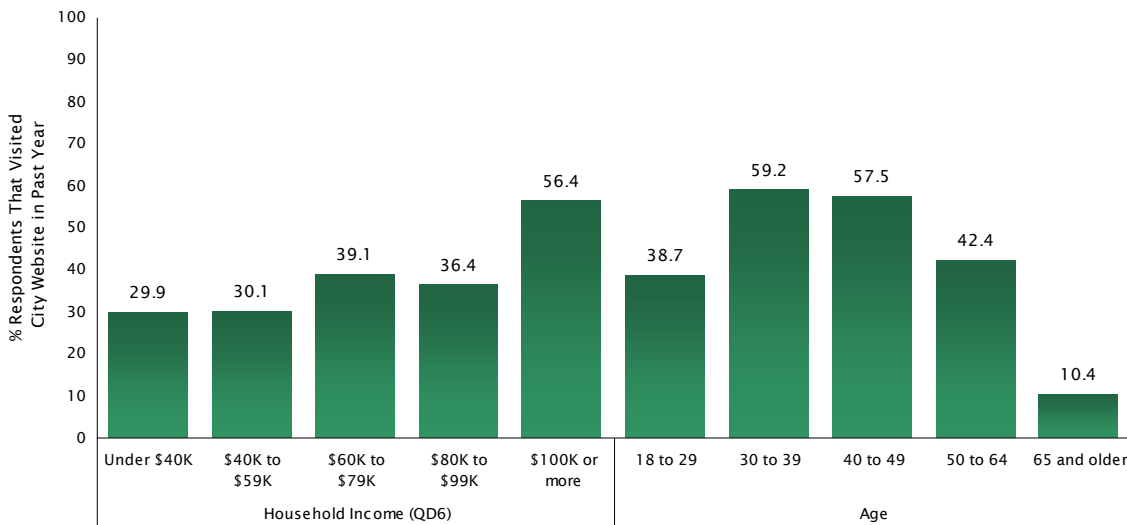


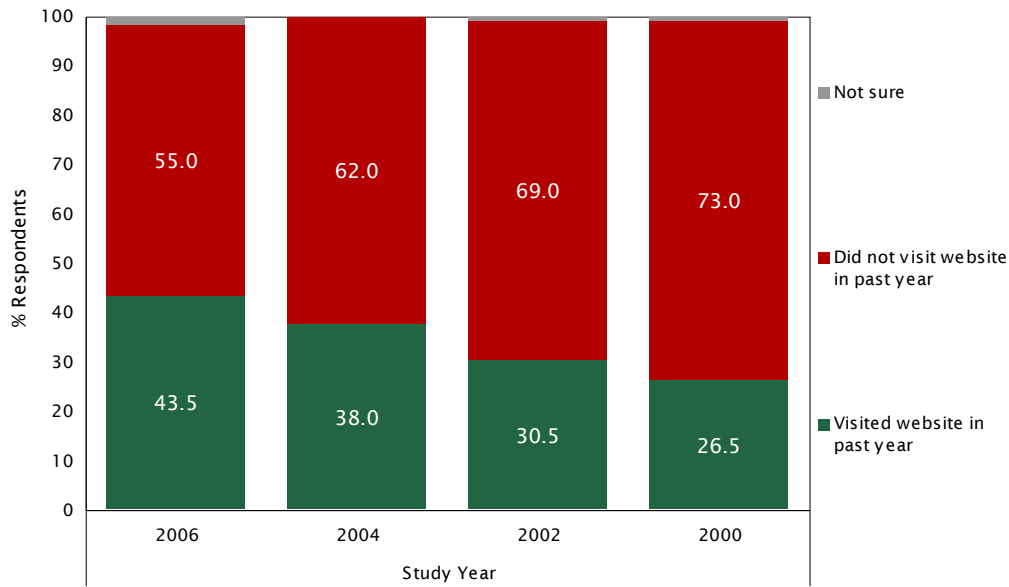
FIGURE 70 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY HOUSEHOLD INCOME & AGE



The proportion of businesses that had visited the City’s websites in the year prior to the interview was similar to that found among residents (see Figure 71). Overall, 44% of businesses indicated that they had visited the City’s websites during this period in 2006. Moreover, like the pattern found among residents, the proportion of businesses that had visited the City’s website has grown substantially since 2000.

Question D4: Business Survey *Have you visited the City of Lake Forest's websites in the past year?*

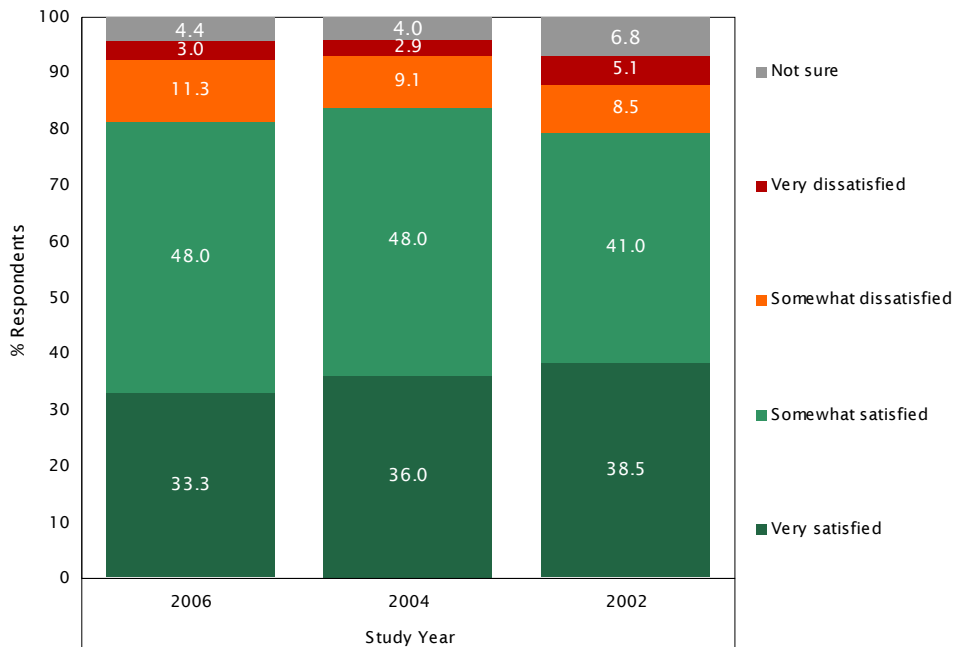
FIGURE 71 VISITED CITY WEBSITE IN PAST YEAR: BUSINESS SURVEY (2006 ~ 2000)



WEBSITE CONTENT Visitors to the City’s websites were next asked to rate their level of satisfaction with the resources available on the sites—the results of which are shown in Figure 72 for residents and Figure 74 for local businesses.

Question D5: Resident Survey *Are you satisfied or dissatisfied with the resources available on the City's web sites?*

FIGURE 72 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY (2006 ~ 2002)



Overall, visitors expressed high levels of satisfaction with the City’s websites, with 81% of residents and 87% of businesses indicating that they were satisfied with the resources available on the sites. When compared to the results for this question in prior years, residents’ opinions remained relatively stable (see Figure 72), whereas the *intensity* of satisfaction among business professionals has dropped considerably since 2002 (Figure 75). One explanation for this pattern may be that although the City has continued to improve its websites, the expectations and standards of the business community have grown at an even faster pace in recent years.

Figures 73 and 74 display how satisfaction with the resources available on the City’s websites varied by subgroups of resident visitors.

FIGURE 73 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY BY YEARS IN LAKE FOREST, CHILD IN HOME & HOUSEHOLD INCOME

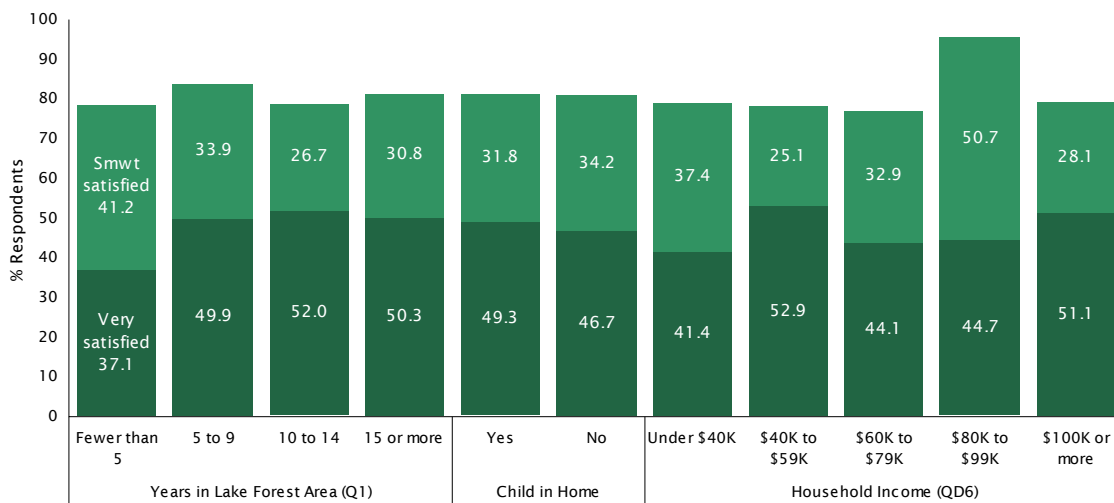
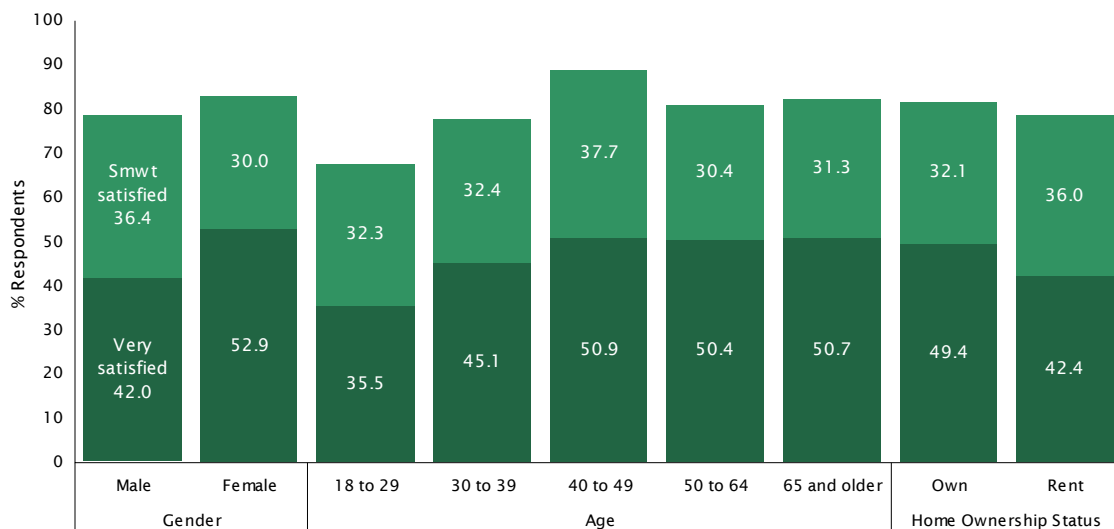
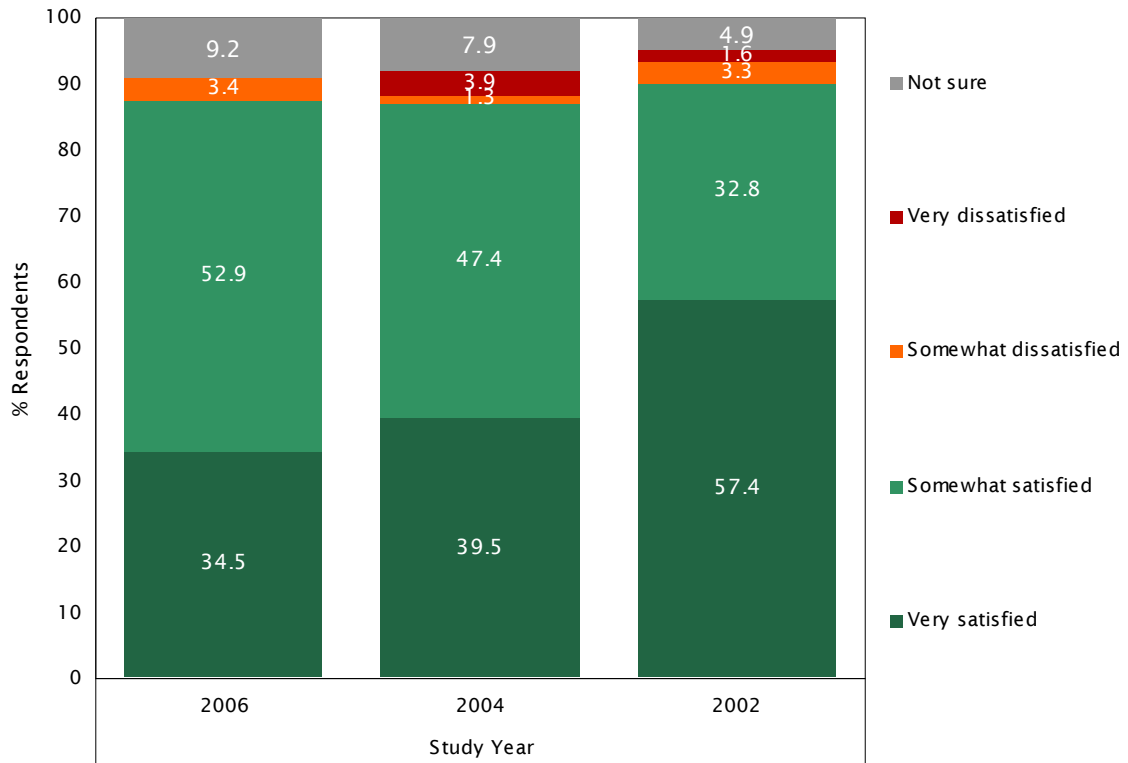


FIGURE 74 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY BY GENDER, AGE & HOME OWNERSHIP STATUS



Question D5: Business Survey *Are you satisfied or dissatisfied with the resources available on the City's web sites?*

FIGURE 75 SATISFACTION WITH CITY WEBSITE: BUSINESS SURVEY (2006 ~ 2002)



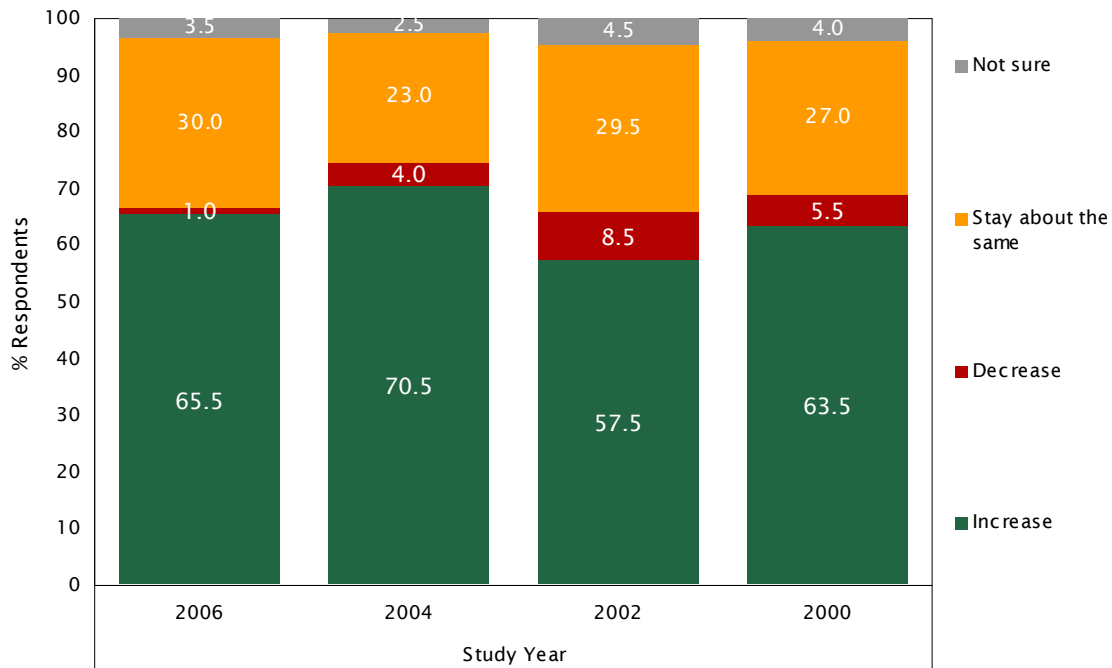
FUTURE BUSINESS NEEDS

At the conclusion of the business survey, respondents were asked several questions about their businesses—including their expectations with respect to future growth, space requirements, and possible relocation.

GROWTH The first question in this series asked local businesses whether—in the upcoming 12 months—they anticipated that their business will increase, decrease, or stay about the same. The results to this question for 2006 and prior years are shown in Figure 76 below. As in prior years, local businesses were generally optimistic about their future growth, with nearly two-thirds (66%) anticipating growth and nearly one-third (30%) expecting that their business would remain about the same. Just 1% indicated that they expect their business to decrease in the coming year.

Question D6: Business Survey *In the next 12 months, do you think your business will increase, decrease, or stay about the same?*

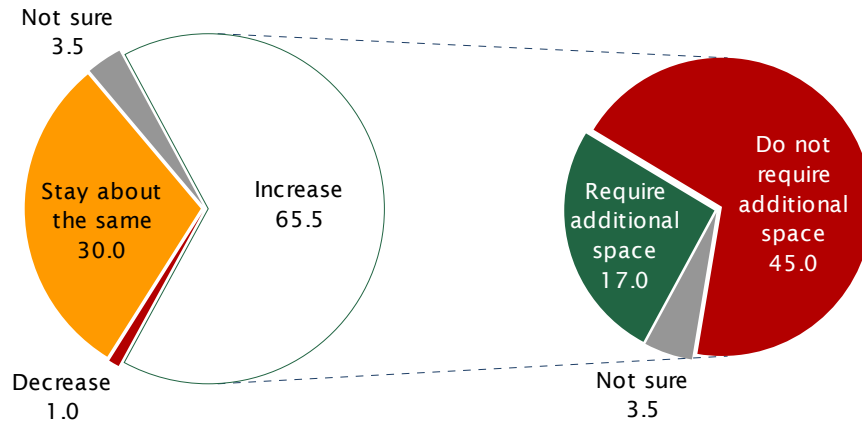
FIGURE 76 PROJECTED BUSINESS SIZE IN NEXT 12 MONTHS (2006 ~ 2000)



REQUIRE ADDITIONAL SPACE? The two-thirds of businesses that anticipated growth in the upcoming 12 months were subsequently asked whether they will require additional square footage or a larger building in order to accommodate the growth. The responses to this question are combined with those of Question D6 in Figure 77 on the next page. Among the 66% of businesses that anticipated growth, 17% indicated that they would require additional space whereas the remaining 49% were either unsure or did not anticipate needing additional space.

Question D7: Business Survey *To accommodate the growth in your business, will you require additional square footage or a larger building?*

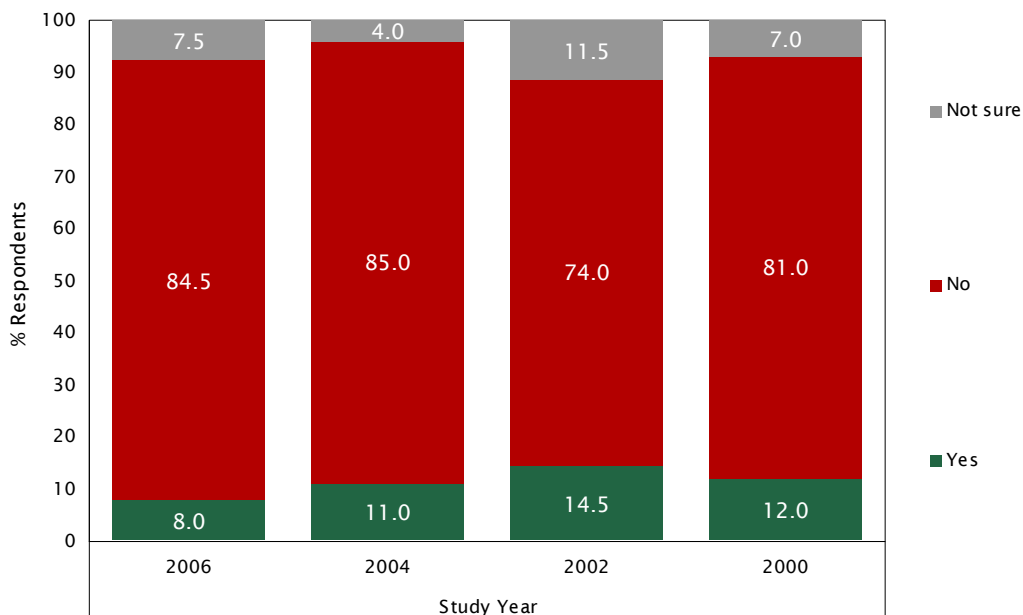
FIGURE 77 PROJECTED NEED FOR ADDITIONAL SQUARE FOOTAGE



RELOCATION The final two substantive questions in the business survey asked respondents whether they anticipated relocating their business in the next year and—if yes—whether they were planning to relocate within Lake Forest or to another community. Figure 78 shows the results to the first question dating back to 2000. The proportion of businesses that anticipated relocating in 2006 was 8%, which is the lowest percentage recorded since 2000. Of the 8% of businesses that anticipated relocating in the next year, approximately half (4%) expected to relocate within Lake Forest, 1.5% to another community, and 2.5% were unsure (see Figure 79)

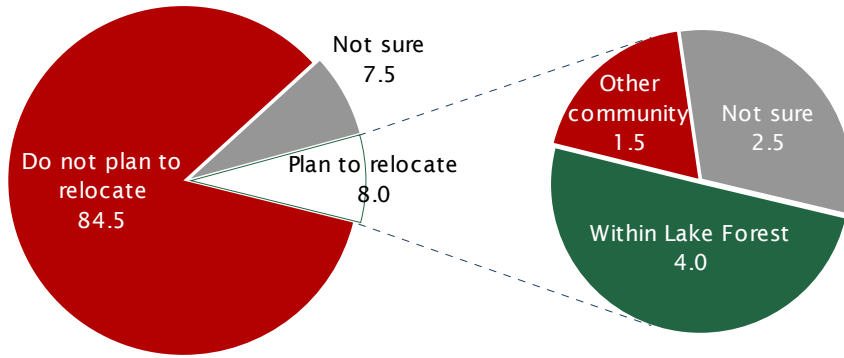
Question D8: Business Survey *In the next 12 months, do you think your business will relocate?*

FIGURE 78 PLANNING RELOCATION IN NEXT 12 MONTHS (2006 ~ 2000)



Question D9: Business Survey *Will you be relocating your business within Lake Forest or to another community?*

FIGURE 79 RELOCATION DESTINATION





BACKGROUND & DEMOGRAPHICS

TABLE 19 SAMPLE DEMOGRAPHICS: RESIDENT SURVEY (2006 ~ 2002)

Study Year	2006	2004	2002
<i>Total Respondents</i>	400	400	400
QD1 Employment status			
Employed full-time	58.5	N/A	N/A
Employed part-time	11.0	N/A	N/A
Student	3.7	N/A	N/A
Homemaker	7.9	N/A	N/A
Retired	16.0	N/A	N/A
In-between jobs	1.9	N/A	N/A
Refused	1.1	N/A	N/A
QD2 Child in home			
Yes	43.4	44.5	44.8
No	56.4	55.0	54.3
Refused	0.2	0.5	1.0
QD3 Live in HOA			
Yes	73.3	72.8	73.3
No	25.6	26.0	25.3
Refused	1.1	1.3	1.5
QD6 Household income			
Under \$40K	7.0	9.5	11.5
\$40K to \$59K	10.3	14.8	15.3
\$60K to \$79K	16.8	21.0	12.8
\$80K to \$99K	10.7	13.3	17.0
\$100K or more	42.4	31.3	29.3
Not sure / Refused	12.9	10.3	14.3
QD7 Gender			
Male	47.5	49.8	49.3
Female	52.5	50.3	50.8
S1 Party			
Democrat	25.5	28.3	26.5
Republican	52.5	50.3	54.8
Other	5.1	4.3	4.8
DTS	17.0	17.3	14.0
S2 Age			
18 to 29	13.4	14.5	14.8
30 to 39	16.9	20.8	22.8
40 to 49	26.9	28.8	26.5
50 to 64	29.9	23.8	23.5
65 and older	13.0	12.3	12.3
S6 Home Ownership status			
Own	75.3	66.5	N/A
Rent	24.7	33.5	N/A

Table 19 presents the key demographic and background information that was collected during the survey of residents. Some of the information was gathered during the interview, whereas other information was available on the voter file sample. Because of the probability-based sampling methodology used in this study, the results shown in the table are representative of registered voters in the City of Lake Forest. The primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics (see Appendix A for more details).

Table 20 provides similar information that was collected from local businesses during the survey. This information was gathered during the survey or from the City's database of local businesses.

TABLE 20 SAMPLE DEMOGRAPHICS: BUSINESS SURVEY (2006 ~ 2000)

Study Year	2006	2004	2002	2000
<i>Total Respondents</i>	200	200	200	200
QD1 Number of employees				
1 to 2	22.5	17.5	25.0	29.5
3 to 5	24.5	22.5	25.5	26.5
6 to 10	16.5	21.5	16.0	18.0
11 to 25	22.0	21.5	15.0	16.0
More than 25	12.5	15.5	12.0	9.0
Refused	2.0	1.5	6.5	1.0
QD2 Business type				
Retail	25.0	27.3	24.1	27.6
Food service	8.0	6.6	8.7	5.5
Entertainment	1.0	0.0	3.6	2.0
Light industrial	9.5	11.6	7.7	8.0
Office	16.5	15.2	10.3	10.6
Technology	6.5	7.1	9.7	9.5
Corporate headquarters	2.5	0.5	2.6	4.0
Warehouse	2.5	4.0	7.2	2.5
None apply	28.5	27.8	26.2	30.2
QD3 Internet access				
Home	63.5	49.0	73.8	67.7
Work	72.0	75.0	74.9	71.3
School	1.5	0.5	1.1	1.2
Library	1.5	1.0	0.5	0.0
Mobile	4.5	1.5	9.3	6.0
QD11 Resident of Lake Forest				
Yes	30.5	23.5	42.5	N/A
No	68.5	76.5	55	N/A
Refused	1.0	0.0	2.5	N/A
QD12 Gender				
Male	58.0	57.0	68.0	71.0
Female	42.0	43.0	32.0	29.0
QS1 Business categories				
C-FR	6.0	4.5	4.5	N/A
C-Southwest	8.5	8.0	8.0	N/A
C-Midcity	8.0	8.5	10.0	N/A
C-RDA	11.0	11.5	12.5	N/A
Homeoccs	12.5	12.5	13.0	N/A
I-AspanLambert	8.0	10.5	12.0	N/A
I-Midcity	13.0	18.0	20.5	N/A
I-FRPH	4.0	4.5	4.0	N/A
I-RDA	2.0	2.5	2.5	N/A
Office	17.5	17.5	11.0	N/A
Other	9.5	2.0	2.0	N/A



M E T H O D O L O G Y

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with the City of Lake Forest to develop questionnaires that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias in responses, the items were asked in a random order for each respondent.

Some of the questions asked in this study were presented only to a subset of respondents. For example, only respondents who had visited one of the City of Lake Forest's websites in the past year were asked about their satisfaction with the resources available on the sites. The questionnaires included with this report (see *Questionnaires & Toplines* on page 78) identify the skip patterns that were used during the interview to ensure that each respondent received the appropriate questions.

Many of the questions asked in the 2006 survey were tracked directly from the 2004, 2002, and 2000 surveys to allow the City to reliably track its performance over time

CATI & PRE-TEST Prior to fielding the surveys, the questionnaires were CATI (Computer Assisted Telephone Interviewing) programmed to assist the live interviewers when conducting the interviews, as well as web programmed to allow online participation. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts the interviewer to certain types of keypunching mistakes should they happen during the interview. The integrity of the questionnaires was pre-tested internally by True North and also by dialing into random homes and businesses in the Lake Forest area prior to formally beginning the surveys.

SAMPLE The resident survey was conducted using a sample of 400 individuals drawn from the universe of registered voters in the City. Consistent with the profile of this universe, a total of 400 clusters were defined, each representing a particular combination of age, gender, partisanship, household party-type, and geographic location within the City. Individuals were then randomly selected based on their profile into an appropriate cluster. This method ensures that if a person of a particular profile refuses to participate in the study, they are replaced by an individual who shares their same profile.

For the business survey, 200 business owners or managers completed the interview, representing a total of 2,782 companies that appear in the City's business database. The businesses were selected from the City's database of businesses operating in the City. It should be noted that due to the large percentage of home-based businesses in the City, the sample was not drawn in a strictly proportional manner. A total of 25 interviews were collected among home-based businesses, with the remaining 175 interviews drawn proportionately from non home-based businesses stratified according to their type and location within the City. The groups were as follows:

- C-FR: Commercial businesses located in shopping centers in Foothill Ranch, north of the 241 toll road.
- C-Southwest: Commercial businesses located in the shopping centers between Interstate 5 and the railroad tracks, excluding the RDA project area (see below).
- C-Midcity: Commercial businesses located in the shopping centers between the railroad tracks and the 241 toll road, excluding the RDA project area (see below).
- C-RDA: Commercial businesses located in shopping centers in the RDA project area.
- Homeoccs: Home-based businesses.
- I-AspandLambert: Industrial businesses located in business parks and industrial areas near Aspan and Lambert.
- I-Midcity: Industrial businesses located in industrial areas between Trabucco and the 241 toll road, excluding the RDA project area.
- I-FRPH: Industrial businesses located in business parks and industrial areas north of the 241 toll road.
- I-RDA: Industrial businesses located in industrial areas within the RDA project area.
- Office: Office buildings.
- Other: Businesses that do not fit into one of the aforementioned categories.

MARGIN OF ERROR By using stratified and clustered samples and monitoring the sample characteristics as data collection proceeded, True North ensured that the samples were representative of registered voters and business managers in the City of Lake Forest.⁶ The results of the surveys can thus be used to estimate the opinions of *all* registered voters and businesses in the City. Because not every voter and business in the City participated, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found, for example, in the survey of 400 voters for a particular question and what would have been found if all 33,873 registered voters in Lake Forest had been interviewed.

For example, in estimating the percentage of registered voters who have applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department in the past year (Question 11 of the resident survey), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence level, and the distribution of responses to the question. The appropriate equation for estimating the margin of error, in this case, is shown below:

$$\hat{p} \pm t \sqrt{\left(\frac{N-n}{N}\right) \frac{\hat{p}(1-\hat{p})}{n-1}}$$

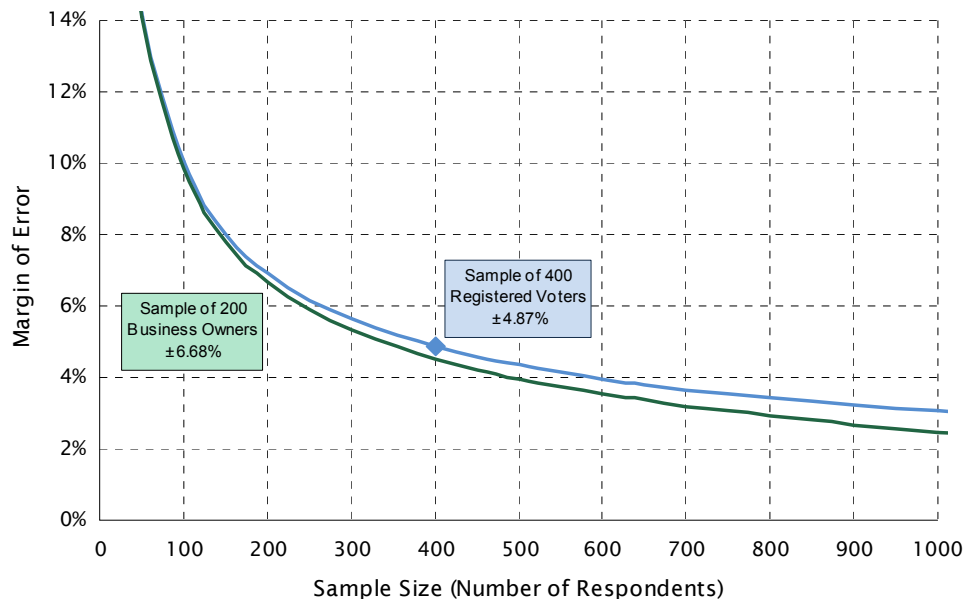
6. As noted previously, the business sample was based on a universe of businesses that was not as heavily weighted toward home-based businesses as is the actual universe.

where \hat{p} is the proportion of voters who have interacted with the Department in the past year (0.11 for 11%, for example), N is the population size of all registered voters (33,873), n is the sample size that received the question (400), and t is the upper $\alpha/2$ point for the t-distribution with $n - 1$ degrees of freedom (1.96 for a 95% confidence interval). Solving this equation using these values reveals a margin of error of $\pm 3.05\%$. This means that, with 11% of registered voters indicating they interacted with the City of Lake Forest's Development Services Department in the past year, we can be 95% confident that the actual percentage of all registered voters who interacted with the Department during that period is between 8% and 14%.

Figure 80 presents the margin of error equation as a graph, plotting sample sizes along the bottom axis. There are two lines represented in the graph, which partially overlap—one for the resident survey and one for the business survey. As seen in the figure, the maximum margin of error in the telephone survey for questions answered by all 400 registered voters is $\pm 4.87\%$, whereas the maximum margin of error for questions answered by all 200 business managers property owners in the mail survey is $\pm 6.68\%$.

Within this report, figures and tables show how responses to certain questions varied by subgroups such as years living in Lake Forest, age of the respondent, and household income. Figure 80 above is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

FIGURE 80 MAXIMUM MARGIN OF ERROR



DATA COLLECTION Consistent with the prior studies, the primary mode of data collection was telephone interviewing. In order to maximize response rates and the convenience of participating in the study, the 2006 surveys were also made available online to sampled respondents.

Telephone interviews for the resident survey were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM) between October 6 and October 16, 2006. It is standard practice not to call during the day on weekdays for resident surveys because most working adults are unavailable and thus calling during those hours would bias the sample. Resident interviews averaged 20 minutes in length.

The business survey was also administered via telephone and via the web. Calls were made during normal business hours between November 1 and November 7, 2006. The business interviews averaged 15 minutes in length.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing open-end responses, and preparing frequency analyses and cross-tabulations. Tests of statistical significance were also conducted to evaluate whether a change in responses between 2004 and 2006 was due to an actual change in opinions or was likely an artifact of independently drawn cross-sectional samples.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and pie charts for a given question.

QUESTIONNAIRES & TOPLINES

RESIDENT SURVEY



City of Lake Forest
Resident Satisfaction Survey
Final Toplines
November 2006

Section 1: Introduction to Study

Hello, may I please speak to ____? My name is _____, and I'm calling on behalf of TNR, a public opinion research company. We're conducting a survey about issues in your community and we would like to get your opinions.

If needed: This is a survey about important issues in Lake Forest - I'm NOT trying to sell anything.

If needed: The survey should take around 15 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back?

If the person says they are an elected official or is somehow associated with the survey, politely explain that this survey is designed to measure the opinions of those not closely associated with the study, thank them for their time, and terminate the interview.

Section 2: General Perception of City & Local Issues

I'd like to begin by asking you a few questions about what it is like to live in the City of Lake Forest.

Q1 First, how long have you lived in the Lake Forest area?

1	Less than 5 years	22%
2	5 years to less than 10 years	24%
3	10 years to less than 15 years	17%
4	15 or more years	37%
99	Not sure/Refused	0%

Q2 What do you feel is the most important issue facing residents of Lake Forest? *Probe:* Any others?

Traffic	24%
Cannot think of any issues	24%
Crime / Public safety	12%
Immigration / Day laborer issues	9%
Availability, cost of housing	8%
Education	7%
City planning / Development	5%
Overcrowding / Growth	5%
Cleaning, maintaining public facilities	4%
Cost of living	4%
Parks / Recreation	3%
Road maintenance	3%
Neighborhood issues	3%
Airport / Marine Base	2%

	Local economy, businesses, jobs	2%
	Pollution / Environment	2%
	Taxes / Fees	2%
	Transportation	2%
	Shopping / Entertainment options	1%
	Youth activities	1%
	Gangs	1%
	War in Iraq	1%
	Quality of life	1%
Q3	How would you rate the overall quality of life in Lake Forest? Would you say it is excellent, good, fair, poor or very poor?	
	1 Excellent	46%
	2 Good	49%
	3 Fair	4%
	4 Poor	1%
	5 Very Poor	0%
	98 Not sure	0%
	99 Refused	0%
Q4	What is it that you value most about living in Lake Forest?	
	Public safety / Low crime rate	21%
	Sense of community / Friendly people	16%
	Convenient location / Proximity	15%
	Peacefulness / Quietness	9%
	Weather / Climate	5%
	Quality of schools, education	4%
	Well-maintained neighborhoods, landscapes	4%
	Trees / Parks / Surroundings	3%
	Not sure	3%
	Quality of life	2%
	Small town feeling	2%
	Environment	2%
	Family-oriented community	2%
	Shopping opportunities	1%
	Affordable housing	1%
	Other (singular responses)	9%

Q5	Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services? (<i>get answer, then ask</i>): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?		
	1	Very satisfied	56%
	2	Somewhat satisfied	35%
	3	Somewhat dissatisfied	4%
	4	Very dissatisfied	2%
	98	Not sure	3%
	99	Refused	0%
Q6	I'm going to read you a sentence, and I'd like you to finish it for me. Here is the sentence: What I want most from the City of Lake Forest over the next two years is:		
		Not sure	12%
		Reduced, improved traffic	11%
		Increased crime prevention, safety	8%
		Improved, repaired roads	7%
		Limited growth	7%
		Redevelopment of commercial areas	5%
		Keep doing what they are doing	4%
		Better, more schools	4%
		Improved shopping, entertainment options	4%
		Enforced immigration laws	4%
		Cleaner air / Better environmental effort	3%
		Increased, improved recreation	3%
		More affordable housing	3%
		Improved parks, recreation	3%
		Improved community spirit, family values	2%
		Improved government leadership	2%
		Improved City communication	2%
		Well-maintained infrastructure	2%
		Completed construction on El Toro Road	1%
		Increased job opportunities	1%
		Lower taxes, fees	1%
		Improved public transportation	1%
		Other (singular responses)	9%

Section 3: Police Department								
Q7		<p>Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Police Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.</p> <p>Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?</p>						
		<i>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Refused
A	Providing neighborhood watch programs	15%	41%	35%	8%	2%	0%	
B	Investigating criminal activity	35%	57%	7%	1%	0%	0%	
C	Providing child safety programs	23%	49%	21%	5%	1%	0%	
D	Enforcing traffic laws	19%	44%	31%	5%	0%	0%	
E	Maintaining a low crime rate	44%	51%	5%	1%	0%	0%	
F	Preparing for emergencies	29%	57%	11%	2%	1%	0%	
G	Providing crossing guards near schools	23%	49%	21%	7%	0%	0%	
H	Providing animal control services	7%	35%	42%	14%	2%	0%	
Q8		<p>For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service.</p> <p>Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</p>						
		<i>Randomize</i>	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Refused
A	Provide neighborhood watch programs	30%	38%	8%	2%	23%	0%	
B	Investigate criminal activity	45%	32%	3%	3%	18%	1%	
C	Provide child safety programs	30%	34%	3%	1%	32%	0%	
D	Enforce traffic laws	44%	41%	7%	2%	6%	0%	
E	Maintain a low crime rate	61%	29%	4%	0%	6%	0%	
F	Prepare for emergencies	23%	36%	5%	2%	34%	0%	
G	Provide crossing guards near schools	57%	25%	3%	1%	15%	0%	
H	Provide animal control services	37%	38%	3%	2%	20%	0%	

Section 4: Development Services							
<p>Q9 Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Development Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.</p> <p>Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?</p>							
		<i>Randomize</i>					
		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Refused
A	Issuing building permits	12%	45%	33%	6%	5%	0%
B	Inspecting buildings	13%	50%	27%	5%	4%	0%
C	Enforcing zoning regulations	12%	44%	33%	7%	4%	0%
D	Enforcing sign regulations	8%	32%	42%	13%	5%	0%
E	Enforcing architectural standards	10%	41%	36%	12%	2%	0%
<p>Q10 Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</p>							
		<i>Randomize</i>					
		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Refused
A	Issue building permits	25%	31%	3%	1%	41%	1%
B	Inspect buildings	22%	32%	3%	1%	42%	0%
C	Enforce zoning regulations	26%	35%	4%	1%	34%	1%
D	Enforce sign regulations	27%	36%	3%	2%	31%	0%
E	Enforce architectural standards	30%	33%	3%	2%	32%	0%
<p>Q11 In the past year, have you applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department?</p>							
	1	Yes	11%				
	2	No	89%				
	98	Not sure	0%				
	99	Refused	0%				

Section 5: Public Works Department							
Q12		Next, I'd like to ask about several services provided by the Public Works Department. For each of the following, please tell me whether the service is extremely important to you, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?					
		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Refused
<i>Randomize</i>							
A	Street sweeping	15%	44%	36%	4%	1%	0%
B	Maintaining trees	20%	49%	27%	3%	1%	0%
C	Preventing storm-water pollution	26%	53%	18%	2%	1%	0%
D	Reducing traffic congestion	38%	52%	7%	2%	1%	0%
E	Maintaining local streets and roads	28%	63%	8%	0%	0%	0%
F	Providing bike paths and pedestrian facilities	19%	49%	28%	3%	0%	0%
G	Maintaining parks and picnic areas	25%	52%	20%	2%	0%	0%
H	Maintaining public landscapes	18%	51%	29%	3%	0%	0%
I	Providing garbage and recycling services	28%	56%	11%	2%	1%	0%
Q13		Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?					
		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Refused
<i>Randomize</i>							
A	Provide street sweeping services	53%	35%	3%	2%	8%	0%
B	Maintain trees	53%	34%	5%	2%	6%	0%
C	Prevent storm-water pollution	32%	35%	5%	2%	25%	0%
D	Reduce traffic congestion	27%	40%	19%	9%	6%	0%
E	Maintain local streets and roads	48%	39%	7%	3%	3%	0%
F	Provide bike paths and pedestrian facilities	50%	35%	4%	3%	8%	0%
G	Maintain parks and picnic areas	58%	34%	3%	1%	4%	0%
H	Maintain public landscapes	56%	35%	4%	1%	3%	0%
I	Provide garbage and recycling services	64%	26%	5%	1%	5%	0%

Section 6: Community Services Department							
Q14	<p>Next I'd like to ask you about a number of services provided by the City of Lake Forest's Community Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.</p> <p>Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?</p>						
<i>Read in Order</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Refused
A	Providing after school recreation programs	18%	37%	24%	15%	6%	0%
B	Providing recreation programs for pre-school children	12%	31%	27%	22%	7%	0%
C	Providing recreation and sports programs for elementary school-aged children	15%	46%	23%	10%	6%	0%
D	Providing recreation and sports programs for teens	21%	45%	20%	8%	5%	0%
E	Providing adult recreation programs such as classes, concerts and trips	11%	30%	36%	19%	4%	0%
F	Providing adult sports programs	6%	23%	42%	25%	5%	0%
G	Providing recreation programs for seniors	10%	39%	35%	12%	4%	0%
H	Providing recreation programs for families	12%	35%	32%	18%	3%	0%
I	Providing special events like concerts in the park and the Fourth of July Parade	15%	43%	30%	10%	2%	0%
Q15	<p>Now I'd like to know how satisfied you are with the job the City of Lake Forest is doing to provide each of the services.</p> <p>Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</p>						
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Refused
A	Provide after school recreation programs	30%	29%	4%	2%	35%	0%
B	Provide recreation programs for pre-school children	25%	25%	3%	1%	46%	0%
C	Provide recreation and sports programs for elementary school-aged children	35%	27%	4%	1%	33%	0%
D	Provide recreation and sports programs for teens	27%	30%	4%	2%	37%	0%
E	Provide adult recreation programs such as classes, concerts and trips	34%	32%	3%	3%	28%	0%
F	Provide adult sports programs	22%	26%	8%	2%	42%	0%
G	Provide recreation programs for seniors	30%	26%	4%	1%	39%	0%

H	Provide recreation programs for families	26%	33%	6%	2%	33%	0%
I	Provide special events like concerts in the park and the Fourth of July Parade	54%	30%	4%	2%	11%	0%

Section 7: Neighborhood Issues

Q16 As I read the following issues, please indicate whether each issue is a big problem, a moderate problem, a small problem, or not a problem in your neighborhood.

		Big Problem	Moderate Problem	Small Problem	Not a Problem	Not Sure	Refused
	<i>Randomize</i>						
A	Graffiti	6%	8%	16%	70%	0%	0%
B	Recreational vehicles parked on the street for more than 72 hours at a time	12%	13%	15%	58%	2%	0%
C	Landscapes and buildings <u>not</u> being properly maintained	6%	9%	16%	69%	0%	0%
D	Speeding vehicles	16%	35%	19%	30%	0%	0%
E	Excessive noise	9%	16%	15%	60%	0%	0%
F	Abandoned vehicles	6%	8%	17%	70%	1%	0%
G	Garages that have been converted to living spaces	7%	8%	7%	73%	4%	0%

Q17 The City of Lake Forest has created codes to address a variety of issues that can affect a neighborhood, such as illegal parking, abandoned vehicles, non-permitted construction, junk storage and properties not being properly maintained. Overall, are you satisfied or dissatisfied with the City's efforts to enforce code violations, or do you not have an opinion? *Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?*

1	Very satisfied	33%	Skip to Q19
2	Somewhat satisfied	29%	Skip to Q19
3	Somewhat dissatisfied	5%	Ask Q18
4	Very dissatisfied	5%	Ask Q18
98	Not sure	26%	Skip to Q19
99	Refused	0%	Skip to Q19

Q18 Is there a particular issue or code violation that the City isn't addressing that leads you to be dissatisfied? *If yes, ask: Please briefly describe it to me.*

	Illegally parked vehicles	49%
	Housing issues	26%
	Pollution control	22%
	Graffiti	6%
	Speeding vehicles	6%
	Not sure	6%

Q19	Street-sweepers clean the public streets and gutters in Lake Forest every week. In many areas of the City, however, the street sweepers aren't able to effectively clean the streets due to parked cars.		
	Thinking of the street that you live on, do parked cars tend to prevent the street sweepers from adequately cleaning your street?		
	1	Yes	39%
	2	No	54%
	98	Not sure	7%
	99	Refused	0%

Section 8: Redevelopment of El Toro

Q20	In the past three months, have you visited or driven by the new Orchard and Home Depot Shopping Centers built along El Toro Road that replaced the former K-Mart Center and Saddleback Valley Plaza?		
	1	Yes	85%
	2	No	14%
	99	Refused	0%
Q21	How would you rate the appearance of the new shopping centers? Would you say it is excellent, good, fair, poor or very poor?		
	1	Excellent	51%
	2	Good	33%
	3	Fair	6%
	4	Poor	3%
	5	Very Poor	2%
	98	Not sure	5%
	99	Refused	1%
Q22	Do you think the City of Lake Forest or Lake Forest Redevelopment Agency should play an active role in helping to redevelop and revitalize older, outdated commercial areas in the City?		
	1	Yes	85%
	2	No	12%
	99	Refused	0%

Section 9: City-Resident Communication		
Q23	Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, and other means? (<i>get answer, then ask</i>): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?	
	1	Very satisfied 48%
	2	Somewhat satisfied 33%
	3	Somewhat dissatisfied 10%
	4	Very dissatisfied 6%
	98	Not sure 4%
	99	Refused 0%
Q24	What information sources do you use to find out about City of Lake Forest news, information and programming? (<i>Don't read list. Record up to first 2 responses</i>). <i>If they say Internet or web, probe to see if a City website and, if yes, which one.</i>	
	The Leaflet	41%
	Saddleback Valley News	17%
	Orange County Register	13%
	Internet - not City website	12%
	City website - general	12%
	City newsletter - general	11%
	Television	7%
	Other (singular responses)	7%
	Not sure	5%
	Flyers at City facilities	4%
	Leisure Times	3%
	E-newsletter	2%
	A View from the Arbor	2%
	Friends / Other people	2%
	Do not receive info	2%
	Los Angeles Times	1%
	City Council Meetings	1%
	Radio	1%
	Gov Populous	1%
	HOA Newsletter	1%

Q25 The City of Lake Forest is considering adding a number of online features and services. As I read each of the following, please tell me whether you would use the service if it were made available.					
	<i>Randomize</i>	Yes (would use)	No (would not use)	Not sure	Refused
A	Streaming live and recorded City Council Meetings	37%	57%	5%	0%
B	The ability to retrieve documents online, such as building permits, City Council agendas, and other city records	70%	26%	3%	0%
C	Online registration for recreation programs	80%	18%	2%	0%
D	Interactive maps that show points of interest in the City, including parks, shopping centers and commercial properties	78%	21%	2%	0%
E	Online payment for city services, such as building permits	55%	42%	3%	0%
F	Information kiosks and electronic signs at key locations in the City that provide information about news, current events and programs in the City	50%	47%	3%	0%

Section 10: Background/Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1 Which of the following best describes your employment status? Would you say you are employed full-time, part-time, a student, a homemaker, retired, or are you in-between jobs right now?		
1	Employed full-time	58%
2	Employed part-time	11%
3	Student	4%
4	Homemaker	8%
5	Retired	16%
6	In-between jobs	2%
98	Not sure	1%
99	Refused	0%
D2 Do you currently have any children under the age of 18 living in your home?		
1	Yes	43%
2	No	56%
99	Refused	0%

D3	Some residents live in Homeowners Associations and some do not. Do you live in a Homeowners Association?		
	1	Yes	73%
	2	No	26%
	99	Refused	1%
D4	Have you visited any of the City of Lake Forest's websites in the past year?		
	1	Yes	45% Ask D5
	2	No	55% Skip to D6
	99	Refused	1% Skip to D6
D5	Are you satisfied or dissatisfied with the resources available on the City's web sites? (<i>get answer, then ask</i>): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?		
	1	Very satisfied	33%
	2	Somewhat satisfied	48%
	3	Somewhat dissatisfied	11%
	4	Very dissatisfied	3%
	98	Not sure	4%
	99	Refused	0%
D6	This last question is for statistical purposes only. As I read the following income categories, please stop me when I reach the category that best represents your household's total annual income before taxes.		
	1	Under \$40,000	7%
	2	\$40,000 to \$59,999	10%
	3	\$60,000 to \$79,999	17%
	4	\$80,000 to \$99,999	11%
	5	\$100,000 or more	42%
	98	Not sure	3%
	99	Refused	10%
Thank you for participating! This survey was conducted for the City of Lake Forest.			

Section 11: Post-Interview & Sample Items		
D7	Gender (<i>Determined by voice of respondent</i>)	
	1	Male 48%
	2	Female 52%
S1	Party	
	1	Democrat 25%
	2	Republican 53%
	3	Other 5%
	4	DTS 17%
S2	Age	
	1	18 to 29 13%
	2	30 to 39 17%
	3	40 to 49 27%
	4	50 to 64 30%
	5	65 or older 13%
S3	Registration Date	
	1	2003 to 2005 34%
	2	2000 to 2002 21%
	3	1997 to 1999 21%
	4	1990 to 1996 11%
	5	Before 1990 14%
S4	Household Party Type	
	1	Single Dem 11%
	2	Dual Dem 8%
	3	Single Rep 16%
	4	Dual Rep 26%
	5	Single Other 10%
	6	Dual Other 5%
	7	Dem & Rep 8%
	8	Dem & Other 5%
	9	Rep & Other 11%
	0	Mixed (Dem + Rep + Other) 2%

S5		
Likely to Vote by Mail		
1	Yes	32%
0	No	68%
S6		
Home Owner		
1	Yes	75%
2	No	25%

BUSINESS SURVEY



City of Lake Forest
Business Survey
Topline Toplines
November 2006

Section 1: Introduction to Study

Hello, may I please speak with _____? My name is _____ and I'm calling on behalf of TNR, a public opinion research company. We're conducting a survey on issues of importance to businesses in Lake Forest and would like to get your opinions.

If person listed on sample is no longer with the company or will not be reachable during the course of the survey, ask to speak to a member of the management team who can speak for the company.

If needed: This is a survey about important business issues in Lake Forest- I'm NOT trying to sell anything.

If needed: The survey should take around 10 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back?

If the person says they are an elected official or is somehow associated with the survey, politely explain that this survey is designed to measure the opinions of those not closely associated with the study, thank them for their time, and terminate the interview.

Section 2: General Perception of Business Climate, Issues and City Performance

I'd like to begin by asking you a few questions about what it is like to conduct business in the City of Lake Forest.

Q1	First, how long has your business operated in Lake Forest?	
1	Less than 5 years	33%
2	5 years to less than 10 years	30%
3	10 years to less than 15 years	12%
4	15 or more years	25%
99	Not sure/Refused	1%

Q2 What do you feel are the one or two most important issues facing the business community of Lake Forest?		
	Not sure	46%
	Traffic congestion	16%
	Taxes / Fees	5%
	Affordability, availability of commercial space	4%
	Crime / Public safety	4%
	Competition from other businesses	4%
	No issues	3%
	Growth / Development	3%
	El Toro Road construction	3%
	Cost of living	3%
	Advertising, marketing opportunities	3%
	Parking / Parking enforcement	3%
	Illegal immigrants / Day laborers	3%
	Beautifying, landscaping City	2%
	Government communication, cooperation	2%
	Demographics of populace	2%
	Pollution / Environmental concerns	2%
	Finding qualified workers	2%
	Youth-related issues	2%
	Signage issues	2%
	Networking opportunities	2%
Q3 How would you rate the business climate in Lake Forest compared to other cities in the area? Would you say it is excellent, good, fair, poor, or very poor compared to other cities in the area?		
1	Excellent	25%
2	Good	54%
3	Fair	16%
4	Poor	2%
5	Very poor	1%
98	Not sure	4%
99	Refused	0%

Q4	Is there a particular aspect or feature of Lake Forest that is beneficial to your business? <i>If yes, ask: Please describe the aspect of Lake Forest that benefits your business.</i>	
	None	27%
	Not sure / Refused	14%
	Access to freeways, proximity to surrounding areas	12%
	Location in general	11%
	Quality, image of City, local community	9%
	Number, quality of local businesses, retailers	6%
	Visibility of business, amount of customer traffic	4%
	Demographics of community	4%
	Open, available land / New construction	3%
	City's pro-business efforts, helpful attitude	3%
	Taxes / Fees / Licensing	3%
	Proximity of business to home	2%
	Low crime rate	2%
	Networking opportunities	1%
	Building inspectors / Permitting process	1%
	Affordability, availability of commercial space	1%
Q5	Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services? <i>(get answer, then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>	
	1 Very satisfied	48%
	2 Somewhat satisfied	39%
	3 Somewhat dissatisfied	6%
	4 Very dissatisfied	2%
	98 Not sure	6%
	99 Refused	0%

Q6	I'm going to read you a sentence, and I'd like you to finish it for me. Here is the sentence:	
	What I want most from the City of Lake Forest over the next two years is:	
	Not sure / Refused	26%
	Continue to grow, zone commercial, industrial	11%
	Reduce traffic / Time traffic lights	9%
	Nothing—keep up good work	8%
	Improve support of businesses, communication	7%
	Redevelop, beautify, landscape City	7%
	Complete construction projects in timely manner	4%
	Improve public safety	4%
	Offer, improve advertising opportunities	4%
	Improve recreation facilities, programs	3%
	Reduce taxes, fees, costs	3%
	Improve parking, parking enforcement	3%
	Limit growth, population increase	2%
	Improve signage regulations	2%
	Address immigration, day laborer issues	2%
	Improve networking opportunities	2%
	Improve code enforcement	1%

Section 3: Specific Services

Q7	Now, I'm going to ask you about a number of specific services provided by the City of Lake Forest. For the following list of services, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important.						
	Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?						
	<i>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Refused
A	Providing business watch programs	18%	33%	31%	14%	6%	0%
B	Investigating criminal activity	37%	50%	7%	5%	1%	0%
C	Enforcing traffic laws	25%	43%	24%	9%	0%	0%
D	Maintaining a low crime rate	47%	46%	5%	2%	1%	0%

E	Providing building permit services	14%	37%	24%	17%	9%	0%
F	Providing building inspection services	11%	38%	29%	16%	7%	0%
G	Promoting economic development	27%	47%	18%	8%	2%	0%
H	Promoting redevelopment	14%	39%	31%	13%	3%	0%
I	Providing business education events	11%	28%	38%	21%	3%	0%
J	Providing business networking events	10%	32%	35%	22%	3%	0%
K	Providing free business consulting services	11%	30%	28%	29%	3%	0%
L	Maintaining a database of Lake Forest businesses	18%	33%	30%	19%	2%	0%
Q8	For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?						
	<i>Randomize</i>	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Provide business watch programs	23%	30%	8%	3%	37%	1%
B	Investigate criminal activity	41%	36%	4%	3%	16%	1%
C	Enforce traffic laws	42%	40%	7%	4%	9%	0%
D	Maintain a low crime rate	53%	35%	3%	3%	7%	0%
E	Provide building permit services	28%	34%	3%	2%	34%	1%
F	Provide building inspection services	29%	36%	4%	2%	30%	1%
G	Promote economic development	34%	38%	5%	2%	22%	1%
H	Promote redevelopment	32%	41%	5%	2%	20%	1%
I	Provide business education events	16%	37%	9%	3%	36%	1%
J	Provide business networking events	16%	40%	7%	3%	35%	1%
K	Provide free business consulting services	14%	35%	8%	3%	39%	2%
L	Maintain a database of Lake Forest businesses	22%	33%	6%	2%	38%	0%

Q9		Now I'm going to ask you about another series of specific services provided by the City. Again, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?					
Randomize		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Refused
A	Enforcing zoning regulations	14%	43%	26%	14%	3%	0%
B	Enforcing sign regulations	16%	40%	31%	12%	2%	0%
C	Revitalizing the El Toro Road commercial area	20%	47%	21%	11%	1%	0%
D	Street sweeping	19%	49%	25%	7%	1%	0%
E	Reducing traffic congestion	29%	53%	14%	5%	0%	0%
F	Maintaining local streets and roads	30%	61%	9%	2%	0%	0%
G	Landscaping median strips and other areas of the City	16%	52%	20%	13%	0%	0%
H	Enforcing architectural standards	11%	46%	27%	15%	2%	0%
Q10		Turning to your satisfaction with these same services, would you say that you are satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?					
Randomize		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Enforce zoning regulations	33%	43%	4%	2%	19%	1%
B	Enforce sign regulations	31%	46%	6%	4%	14%	0%
C	Revitalize the El Toro Road commercial area	43%	40%	6%	4%	8%	1%
D	Provide street sweeping services	38%	50%	4%	2%	7%	0%
E	Reduce traffic congestion	24%	48%	17%	8%	5%	0%
F	Maintain local streets and roads	42%	49%	5%	2%	3%	0%
G	Landscape median strips and other areas of the City	43%	45%	4%	3%	7%	0%
H	Enforce architectural standards	35%	45%	3%	3%	14%	1%

Section 4: Community Appearance/Issues							
Q11	As I read the following issues, please indicate whether each issue is a big problem, a moderate problem, a small problem, or not a problem in the area surrounding <u>your</u> business location in Lake Forest.						
	<i>Randomize</i>	Big Problem	Moderate Problem	Small Problem	Not a Problem	Not Sure	Refused
A	Graffiti	5%	11%	18%	65%	2%	0%
B	Landscapes and buildings <u>not</u> being properly maintained	9%	11%	19%	61%	1%	1%
C	Speeding vehicles	14%	22%	24%	40%	1%	0%
D	Excessive noise	7%	12%	9%	73%	1%	0%
E	Abandoned vehicles	8%	9%	15%	65%	4%	0%
F	Illegal signs	5%	5%	13%	71%	6%	0%
Q12	The City of Lake Forest has created codes to address a variety of issues that can affect commercial areas, such as property maintenance, outdoor storage, and the use of temporary signs and banners. Overall, are you satisfied or dissatisfied with the City's efforts to <u>enforce</u> code violations, or do you not have an opinion? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>						
	1	Very satisfied	28%		Skip to Q14		
	2	Somewhat satisfied	28%		Skip to Q14		
	3	Somewhat dissatisfied	5%		Ask Q13		
	4	Very dissatisfied	4%		Ask Q13		
	98	Not sure	35%		Skip to Q14		
	99	Refused	1%		Skip to Q14		
Q13	Is there a particular issue or code violation that the City isn't addressing that leads you to be dissatisfied? <i>If yes, ask: Please briefly describe it to me.</i>						
	Verbatim responses on file						
Q14	Street-sweepers clean the public streets and gutters in Lake Forest every week. In many areas of the City, however, the street sweepers aren't able to effectively clean the streets due to parked cars. Thinking of the street that your business is located on, do parked cars tend to prevent the street sweepers from adequately cleaning your street?						
	1	Yes	16%				
	2	No	72%				
	3	Doesn't Apply/Not Applicable	11%				
	98	Not sure	2%				
	99	Refused	0%				

Section 5: Redevelopment of El Toro

Q15	In the past three months, have you visited or driven by the new Orchard and Home Depot Shopping Centers built along El Toro Road that replaced the former K-Mart Center and Saddleback Valley Plaza?		
	1	Yes	72%
	2	No	28%
	99	Refused	1%
Q16	How would you rate the appearance of the new shopping centers? Would you say it is excellent, good, fair, poor or very poor?		
	1	Excellent	51%
	2	Good	36%
	3	Fair	6%
	4	Poor	2%
	5	Very Poor	1%
	98	Not sure	3%
	99	Refused	0%
Q17	Do you think the City of Lake Forest or Lake Forest Redevelopment Agency should play an active role in helping to redevelop and revitalize older, outdated commercial areas in the City?		
	1	Yes	87%
	2	No	9%
	99	Refused	5%

Section 6: City-Business Communication

Q18	Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, and other means? (<i>get answer, then ask</i>): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?		
	1	Very satisfied	32%
	2	Somewhat satisfied	42%
	3	Somewhat dissatisfied	14%
	4	Very dissatisfied	4%
	98	Not sure	10%
	99	Refused	0%

Q19	What information sources does your business use to find out about City of Lake Forest news, information and programming? (Don't read list. Record up to first 2 responses).				
	Orange County Register	20%			
	The Leaflet	16%			
	City website - general	16%			
	Internet - not City website	14%			
	Not sure	11%			
	City newsletter - general	9%			
	Flyers at City facilities	9%			
	Saddleback Valley News	8%			
	Do not receive info	5%			
	Los Angeles Times	4%			
	Friends / Other people	4%			
	E-newsletter	3%			
	Leisure Times	2%			
	A View from the Arbor	1%			
	City Council Meetings	1%			
	The Arbor website	1%			
	Gov Populous	1%			
Q20	The City of Lake Forest is considering adding a number of online features and services. As I read each of the following, please tell me whether your business would use the service if it were made available.				
	<i>Randomize</i>	Yes (would use)	No (would not use)	Not sure	Refused
A	Streaming live and recorded City Council Meetings	27%	60%	13%	0%
B	The ability to retrieve documents online, such as building permits, City Council agendas, and other city records	65%	27%	9%	0%
C	Interactive maps that show points of interest in the City, including parks, shopping centers and commercial properties	66%	26%	8%	0%
D	Online payment for city services, such as building permits	53%	39%	9%	0%
E	Information kiosks and electronic signs at key locations in the City that provide information about news, current events and programs in the City	40%	49%	11%	0%

Section 7: Background/Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1	How many people are currently employed at your worksite in Lake Forest?	
	1 to 2	23%
	3 to 5	25%
	6 to 10	17%
	11 to 25	22%
	More than 25	13%
	Not sure	2%
D2	Is it most accurate to say that your business is retail-oriented, food service-oriented, entertainment-oriented, light industrial or manufacturing-oriented, office-oriented, technology-oriented, a corporate headquarters, a warehouse or distribution center, or do none of these descriptions apply?	
	1 Retail oriented	25%
	2 Food service	8%
	3 Entertainment oriented	1%
	4 Light industrial/manufacturing oriented	10%
	5 Office oriented	17%
	6 Technology oriented	7%
	7 Corporate headquarters	3%
	8 Warehouse/distribution	3%
	9 None apply	28%
	99 Refused	1%
D3	If you access the Internet, where do you typically access it? (<i>Multiple responses allowed</i>)	
	1 Home	64%
	2 Work / office / business	72%
	3 School	2%
	4 Library	2%
	5 Mobile / laptop / PDA	5%
	6 Community center	1%
	7 Friend / relative's house	1%
	8 Church	1%
	9 Other	0%
	99 Refused	1%

D4	Have you visited the City of Lake Forest's websites in the past year?			
	1	Yes	44%	Ask D5
	2	No	55%	Skip to D6
	99	Refused	2%	Skip to D6
D5	Are you satisfied or dissatisfied with the resources available on the City's web sites? (<i>get answer, then ask</i>): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?			
	1	Very satisfied	34%	
	2	Somewhat satisfied	53%	
	3	Somewhat dissatisfied	3%	
	4	Very dissatisfied	0%	
	98	Not sure	8%	
	99	Refused	1%	
D6	In the next 12 months, do you think your business will increase, decrease or stay about the same?			
	1	Increase	66%	Ask D7
	2	Decrease	1%	Skip to D8
	3	Stay about the same	30%	Skip to D8
	98	Not sure	3%	Skip to D8
	99	Refused	1%	Skip to D8
D7	To accommodate the growth in your business, will you require additional square footage or a larger building?			
	1	Yes	26%	
	2	No	69%	
	98	Not sure	5%	
	99	Refused	0%	
D8	In the next 12 months, do you think your business will relocate?			
	1	Yes	8%	Ask D9
	2	No	85%	Skip to D11
	98	Not sure	7%	Skip to D11
	99	Refused	1%	Skip to D11
D9	Will you be relocating your business within Lake Forest or to another community?			
	1	Lake Forest	50%	Skip to D11
	2	Another community	19%	Ask D10
	98	Not sure / Refused	31%	Skip to D11

D10	Is there a particular reason why your business is leaving Lake Forest? <i>If yes, ask: Please describe the reason.</i>	
		Verbatim responses on file
D11	Last question for you. Are you a resident of Lake Forest?	
	1	Yes 31%
	2	No 69%
	99	Refused 0%

Thank you for participating! This survey was conducted for the City of Lake Forest.

Section 12: Post-Interview & Sample Items		
D12	Gender (<i>Determined by voice of respondent</i>)	
	1	Male 58%
	2	Female 42%
S1	Sample Subgroup	
	1	C-FR 6%
	2	C-Southwest 9%
	3	C-Midcity 8%
	4	C-RDA 11%
	5	Homeoccs 13%
	6	I-AspanLambert 8%
	7	I-Midcity 13%
	8	I-FRPH 4%
	9	I-RDA 2%
	10	Office 18%
	11	Other 10%