



community satisfaction survey



Lake Forest

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report prepared for the
City of Lake Forest



TRUENORTH
RESEARCH

741 Garden View Court, Suite 208
Encinitas, California 92024
760.632.9900 www.tn-research.com



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INTRODUCTION

Located in the heart of South Orange County and the beautiful Saddleback Valley, the City of Lake Forest has been carefully managed to help ensure that it will always be an ideal place for businesses 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 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 opinions regarding potential capital improvements and 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, 2004, and 2006. 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 prior surveys.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 76). In brief, a total of 400 randomly selected Lake Forest residents who are registered to vote participated in the resident survey between November 11 and November 19, 2008. Survey participants were categorized into one of four geographic areas according to the location of their residence (see Figure 1 map on next page). The resident interviews averaged 20 minutes in length. The 15-minute survey of business managers was administered to a stratified random sample of 200 local business owners and managers between November 24 to December 4, 2008.

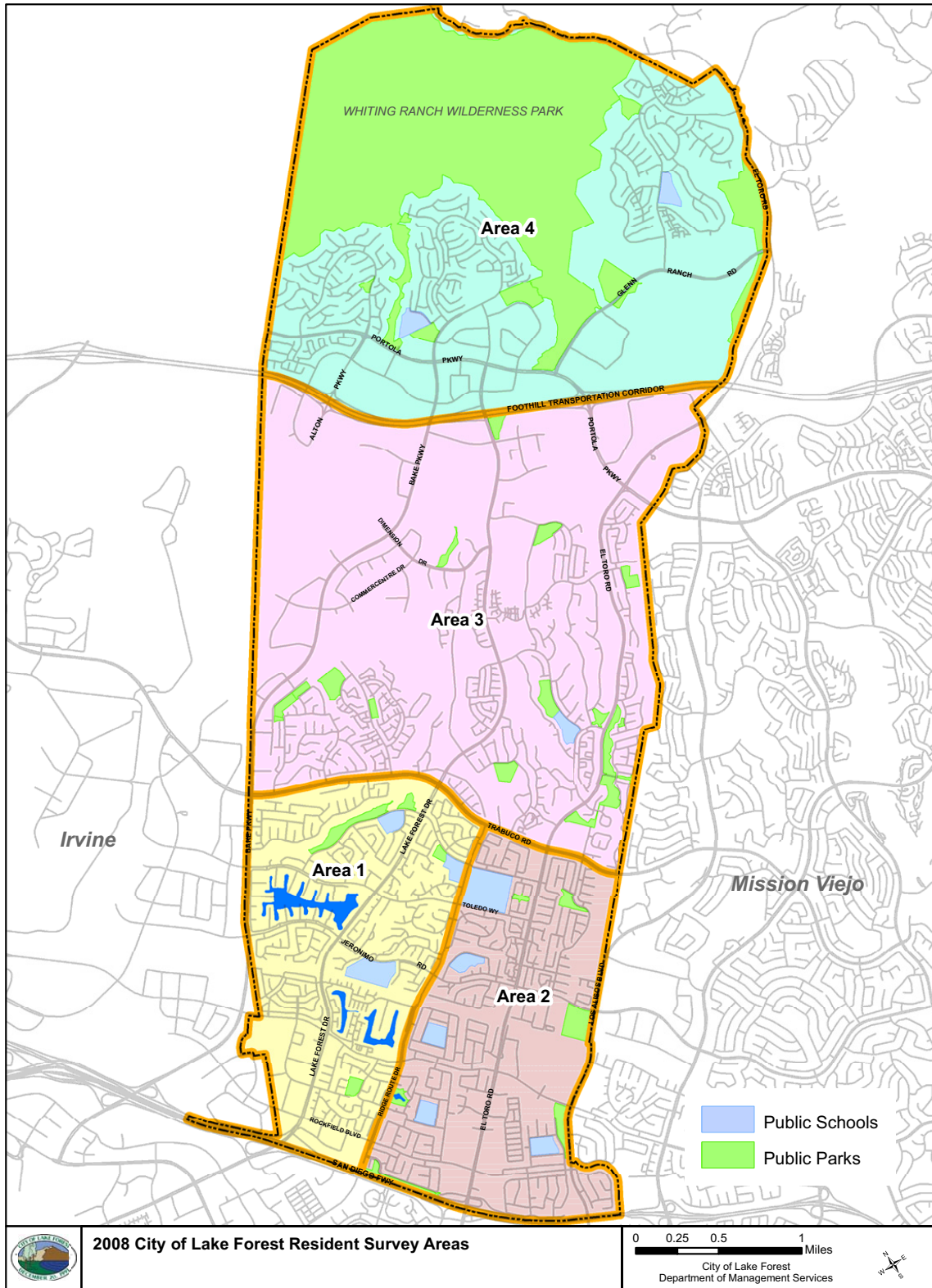
STATISTICAL SIGNIFICANCE As noted above, many of the figures and tables in this report present the results of questions asked in 2008 alongside the results found in previous surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify 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 thanks the staff at the City of Lake Forest who contributed their valuable input during the design stage of this study. Their collective experience, local knowledge, 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.

FIGURE 1 MAP OF LAKE FOREST STUDY AREA



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 surveys, 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 500 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 2008 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

- One-quarter (25%) of residents did not perceive (or were unable to offer) a specific issue or problem facing residents in Lake Forest. Among the specific issues that were mentioned, traffic congestion (17%), crime/public safety (14%), and the state of the local economy/job market (11%) were mentioned most often. The availability/cost of housing (9%) and the quality of education in Lake Forest (6%) were the only other issues that were cited by at least 5% of respondents.
- 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 (33%). Among the specific issues mentioned, concerns about the economy topped the list (23%), followed by traffic congestion (6%). All other issues were mentioned by less than 5% of businesses surveyed, respectively.
- The vast majority of residents shared very favorable opinions of the quality of life in Lake Forest, with 52% reporting it is excellent, 41% good, and only 4% saying it is fair. Less than 3% 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, 23% reported that it is excellent, 48% stated it is good, and 26% offered that it is fair. Just 3% of businesses indicated that, when compared to neighboring areas, the business climate in the City of Lake Forest is either poor or very poor.

OVERALL SATISFACTION

- An overwhelming majority of residents (92%) 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 (12%), followed by increasing crime prevention and public safety (11%), and improving recreation opportunities (5%). Businesses mentioned improved support for/communication with local businesses (12%), redevelop/beautify the City (7%), maintain infrastructure (7%), and reduce taxes/fees (7%). It is worth noting that 9% of residents and 8% of businesses took the opportunity to provide a favorable assessment of the City's performance by requesting that the City simply continue doing what it is already doing.

SPECIFIC SERVICES: RESIDENT SURVEY

- Among the services provided by the **Police**, 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, provide child safety programs, and maintain a low crime rate.

- Among the services provided by the **Development Services Department**, residents rated inspecting buildings as the most important service, followed by enforcing zoning regulations, and issuing building permits. Residents were similarly satisfied with the Department's efforts to provide all four services tested in the survey.
- Of the residents surveyed, just 8% 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 service, followed by providing garbage and recycling services, and reducing traffic congestion. Residents were most satisfied with the Department's efforts to maintain public landscapes, provide street sweeping services, and maintain trees.
- 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 after school recreation programs. Residents were most satisfied with the Department's efforts to provide special events, followed by recreation and sports programs for seniors, and recreation programs for adults.

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 enforce traffic laws, maintain a low crime rate, and provide building permit 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 landscaping medians and other areas of the City. Satisfaction was greatest with respect to the City's efforts to landscape medians and other public areas, provide street sweeping, and maintain local streets and roads.

SPORTS PARK & COMMUNITY CENTER

- When asked to prioritize among a list of amenities for inclusion in the proposed 40 acre sports park, residents were most enthused about having outdoor courts for sports like basketball, volleyball, tennis and roller hockey, followed by lighted sports fields, and outdoor tracks and circuits for walking, running and exercising.
- When asked to prioritize among a list of facilities for inclusion in the proposed Community Center, residents were most enthused with the prospect of having special purpose rooms that can be used for activities like arts and crafts, dance and aerobics. General purpose rooms for meetings and classes were also popular, as were a Senior Center, a computer lab, and a community stage.

NEIGHBORHOOD ISSUES

- The most commonly perceived neighborhood problem among those tested for residents was too many vehicles associated with a single home, followed by illegally parked vehicles and too many people living in a single house.

- For the business community, abandoned vehicles, graffiti, and landscapes and/or buildings not being properly maintained had the highest 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 13% were dissatisfied with City's efforts in this respect, whereas the remaining respondents were either very (38%) or somewhat (23%) satisfied with the City's code enforcement efforts.
- Just over one-third (37%) 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 8% stated that they were dissatisfied.

GO LOCAL TRANSIT

- Among all businesses surveyed, the average number of employees was 11.97.
- On average, businesses reported 5.73 employees who work in Lake Forest but reside outside of the City—or approximately 48% of the average total number of employees per business.
- Sixty-three percent (63%) of Lake Forest businesses have employees who commute to Lake Forest from other areas.
- Less than 3% of Lake Forest businesses have at least one employee who currently uses the Metrolink.
- More than one quarter (28%) of businesses expected that the availability of local shuttles would increase Metrolink usage among their employees.
- Among businesses surveyed, a total of 98 employees were estimated to start using the Metrolink if local shuttles were made available. This represents approximately 9% of the total workforce that commutes into Lake Forest among those businesses surveyed.
- Few Lake Forest businesses (2%) currently provide incentives for employees to use public transit.
- Approximately 5% of all Lake Forest businesses would, however, be willing to help pay for the costs of operating a local shuttle that would transport employees between their work site and the Metrolink station.

COMMUNICATION

- Overall, 85% of residents indicated that they were either very (51%) or somewhat (34%) satisfied with the City's efforts to communicate with them through newsletters, the Internet, and other means.
- Overall, 78% of local businesses indicated that they were either very (38%) or somewhat (39%) satisfied with the City's efforts to communicate with them through newsletters, the Internet, and other means.
- Approximately one-third (31%) of residents indicated there was a particular topic or issue that they'd like to receive more information about from the City. Information about the proposed sports park and existing recreation facilities was the most commonly mentioned topic of interest, followed by information about current events and activities, traffic issues, garage conversions, construction/development projects in Lake Forest, and crimes in the City.

- The most frequently cited source of information for City news among residents in 2008 was the City's newsletter, mentioned by name (*The Leaflet*) by 42% of respondents and referred to in general (the City's newsletter) by an additional 21% of residents. Other sources that were mentioned by at least 10% of residents included the City's website (22%), the Internet in general (14%), and the *Orange County Register* (12%).
- Members of the business community were most likely to mention the City's website (23%) and newsletter—generally (23%) and by its name *The Leaflet* (22%)—when asked what information sources they rely on for Lake Forest news, information and programming.
- Forty-nine percent (49%) of residents indicated that they had visited at least one of the City's websites in the 12 months prior to the interview.
- Half (50%) of businesses indicated that they had visited at least one of the City's websites in the 12 months prior to the interview.
- Visitors expressed high levels of satisfaction with the City's websites, with 86% of residents and 94% of businesses indicating that they were satisfied with the resources available on the sites.
- When local businesses were asked to rate their interest in a series of topics that could be included in a proposed business-oriented newsletter, interest was greatest for updates on City projects, followed closely by profiles on local companies, market-related information, and tips from local businesses.
- Lake Forest businesses expressed the greatest interest in attending business networking events (70% very or somewhat interested), followed by seminars on business marketing and sales (66%), and a business job fair and expo (62%).

BUSINESS BACKGROUND INFO

- When asked to identify the most important factor for why they chose to locate their business in the City of Lake Forest, more than one-third (35%) indicated that it is close to the owner's home. Other reasons cited by at least 5% of respondents included that Lake Forest is close to clients/customers (12%), is a high-quality city (7%), is in a convenient location (7%), has competitive lease rates (6%), and is close to freeways (5%).
- Local businesses were generally optimistic about their future growth, with 42% anticipating growth in the next 12 months and 38% expecting that their business would remain about the same. Just 15% indicated that they expect their business to decrease in the coming year.
- Seven percent (7%) of Lake Forest businesses anticipated relocating in the next year. Approximately half (4%) expected to relocate to another community, 1% within Lake Forest, and 1.5% were unsure.



CONCLUSIONS

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 continue to be 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 continued the eight year trend of improving its performance 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 eight years to 92% 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 61% in 2008. 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 2008 was 49%.

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, as well as a positive business climate. Nearly every resident surveyed (93%) rated the quality of the life in the City as excellent or good, and most businesses rated Lake Forest's business climate favorably when compared to neighboring areas.

It is also 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. A substantial percentage of respondents also took the opportunity to reiterate their favorable assessment of the City's overall performance by requesting that the City simply continue doing what it is already doing.

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 virtually all 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.

As the City continues to strive for improvement, however, the results of this study do suggest opportunities to further bolster community satisfaction. Considering respondents' open-ended statements about what they want most from the City in the next two years (see *What I Want Most...* on page 21) and the most important issues facing the City (see *Local Issues* on page 13), as well as the 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 38), the top priority for both residents and businesses is managing traffic congestion. When prompted, residents also identified economic development/job creation, providing adult sports programs, increased public safety, providing animal control services, and enforcing zoning regulations as priorities. Local businesses, when prompted, identified a need for business networking events, free business consulting services, and greater promotion of economic development.

We feel it is equally important to stress that the appropriate strategy for improving community satisfaction in these areas would likely be a com-

bination of better communication and actual service improvements. It may be, for example, that many residents and businesses are simply not aware of the City's existing economic development plans or 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 the community's 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 is doing 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 and businesses rely on conventional media sources such as local and regional papers for information about City news, events and programming, Lake Forest residents and businesses generally turn to the City's newsletter (*The Leaflet*) and City websites. And, they are also doing so in larger numbers in recent years. Reliance on the City's website and *The Leaflet* for city-related information and programming increased significantly since 2006, especially among local businesses. The proportion of business professionals who mentioned that they rely on the City's website and newsletter more than doubled in the past two years, catapulting these information sources to the top of the list.

The high penetration of the City's newsletter and the high rates of viewership for the City's websites are undoubtedly one of the keys to understanding why residents and businesses in Lake Forest are so pleased with the City's communication efforts.

Are local businesses interested in the City playing a more active role in economic development?

Yes. In addition to the City's general efforts to promote economic development in the City, Lake Forest businesses were clearly interested in the City playing a more active role in helping local businesses where possible. More than three-quarters of those surveyed expressed at least moderate interest in a business-oriented newsletter that would provide updates on City projects, profile local companies, provide market information, suggest tips for local businesses, and address other topics. Similarly, a majority of those surveyed expressed interest in attending seminars hosted by the City on business topics, including networking events, marketing and sales, and a job fair and expo.

What appears to be the demand for enhanced Metrolink service among existing Lake Forest businesses?

The Go Local program is a plan to implement city-initiated transit extensions to the Orange County Transportation Authority's (OCTA) Metrolink commuter rail line. The Metrolink rail line is the backbone of the County's transit system, with two-thirds of the County's population and job centers located within a four mile radius of the county's 10 Metrolink stations. One of the goals of the 2008 Lake Forest business survey was to gather additional information about existing use of the Metrolink, as well as latent demand for the transit service and local businesses' willingness to sponsor Metrolink shuttle services for their employees.

Keeping in mind that a single individual in the company was asked to estimate existing ridership and potential demand for enhanced Metrolink services (rather than surveying employees individually), the results of the survey indicate that few employees of Lake Forest businesses currently utilize the Metrolink despite nearly half (48%) of the workforce for Lake Forest businesses residing outside the City. Indeed, although 63% of Lake Forest businesses have employees who commute to Lake Forest from other areas, less than 3% of Lake Forest businesses have at least one employee who currently uses the Metrolink.

The results of the survey also suggest, however, that the advent of a local shuttle program that would provide shuttle service between the Metrolink and Lake Forest businesses would substantially increase Metrolink use. More than one quarter (28%) of businesses expected that the availability of local shuttles would increase Metrolink usage among their employees, resulting in approximately 9% of the total workforce that commutes into Lake Forest among those businesses surveyed starting to use Metrolink. Moreover, approximately 5% of Lake Forest businesses indicated that they would help pay for the costs of operating a local shuttle service, even though few (2%) currently provide incentives for employees to use public transit.

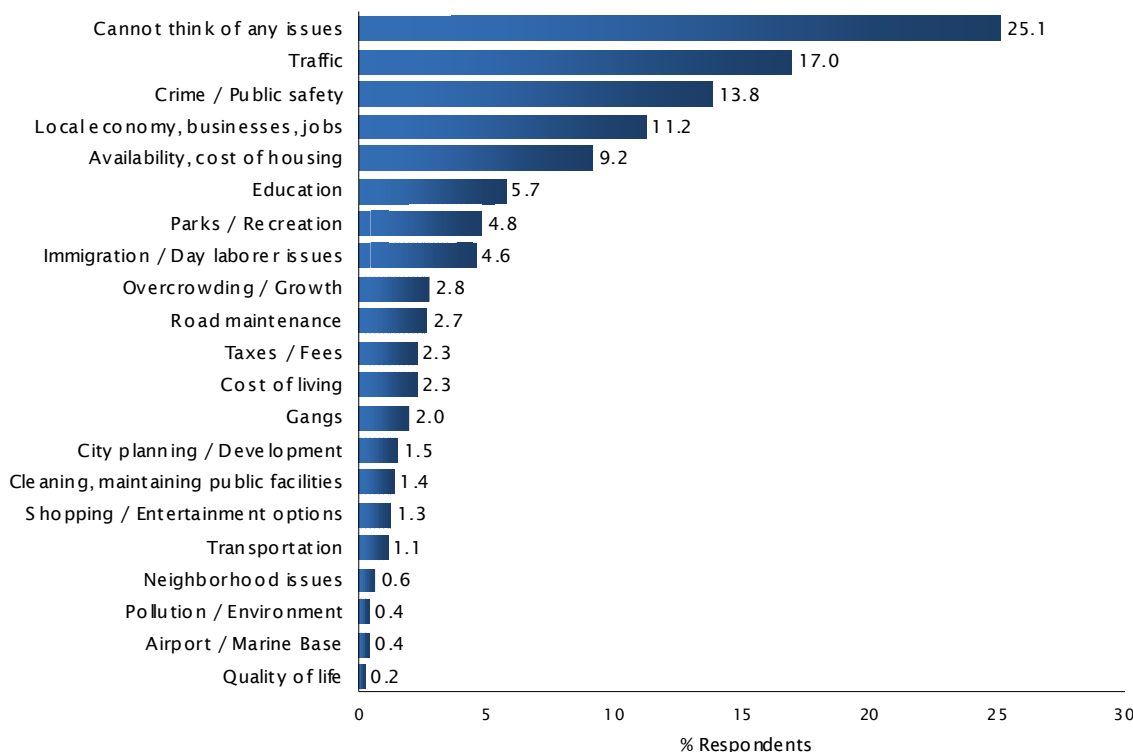
GENERAL PERCEPTIONS OF CITY & LOCAL ISSUES

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 2 for residents and Figure 3 for the business community.

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

FIGURE 2 MOST IMPORTANT ISSUES FACING RESIDENTS



One-quarter (25%) of residents did not perceive (or were unable to offer) a specific issue or problem facing residents in Lake Forest. Among the specific issues that were mentioned, traffic congestion (17%), crime/public safety (14%), and the state of the local economy/job market (11%)

were mentioned most often. The availability/cost of housing (9%) and the quality of education in Lake Forest (6%) were the only other issues that were cited by at least 5% of respondents.

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 were resolved in past years, traffic and public safety concerns have risen to the top of the scale. The introduction of the immigration/day laborer issue in 2006 was undoubtedly a reflection of the politicization of this issue in state and national politics that year,¹ and it has been supplanted in 2008 by concerns about the local economy/job market as both the State and the Nation grapple with the recession.

TABLE 1 TOP FIVE ISSUES FACING RESIDENTS (2008 ~ 2000)

Study Year				
2008	2006	2004	2002	2000
Cannot think of any issues	Traffic	Traffic	El Toro Airport / Marine Base	El Toro Airport / Marine Base
Traffic	Cannot think of any issues	Cannot think of any issues	Traffic	Traffic
Crime / Public safety	Crime / Public safety	Crime / Public safety	Cannot think of any issues	Crime / Public safety
Local economy, businesses, jobs	Immigration / Day laborer issues	El Toro Airport / Marine Base	Crime / Public safety	Availability, cost of housing
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 3 on the next page.

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 (33%). Among the specific issues mentioned, concerns about the economy (national, regional or local) topped the list (23%), followed by traffic congestion (6%). All other issues were mentioned by less than 5% of businesses surveyed, respectively. When compared to the 2006 study, concerns about the economy were far more salient in 2008 (see Table 2).

1. The immigration issue was arguably the most salient domestic issue in both state and national politics during the general election cycle in 2006. 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 3 MOST IMPORTANT ISSUES FACING BUSINESS COMMUNITY

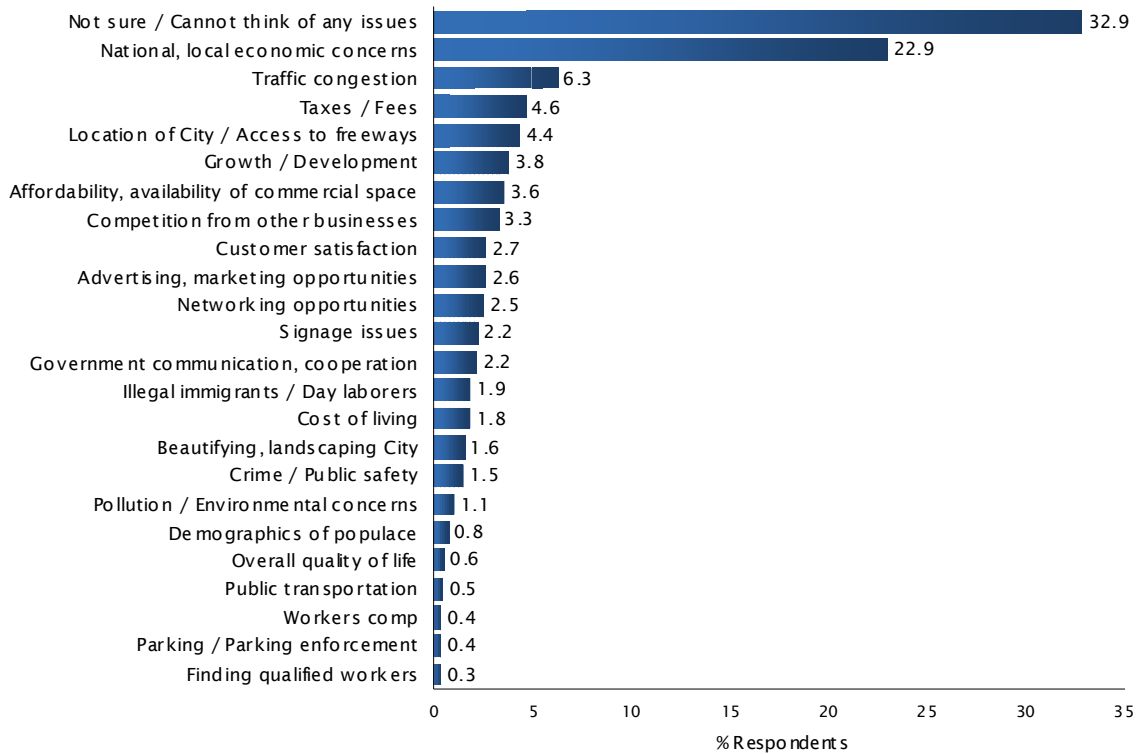


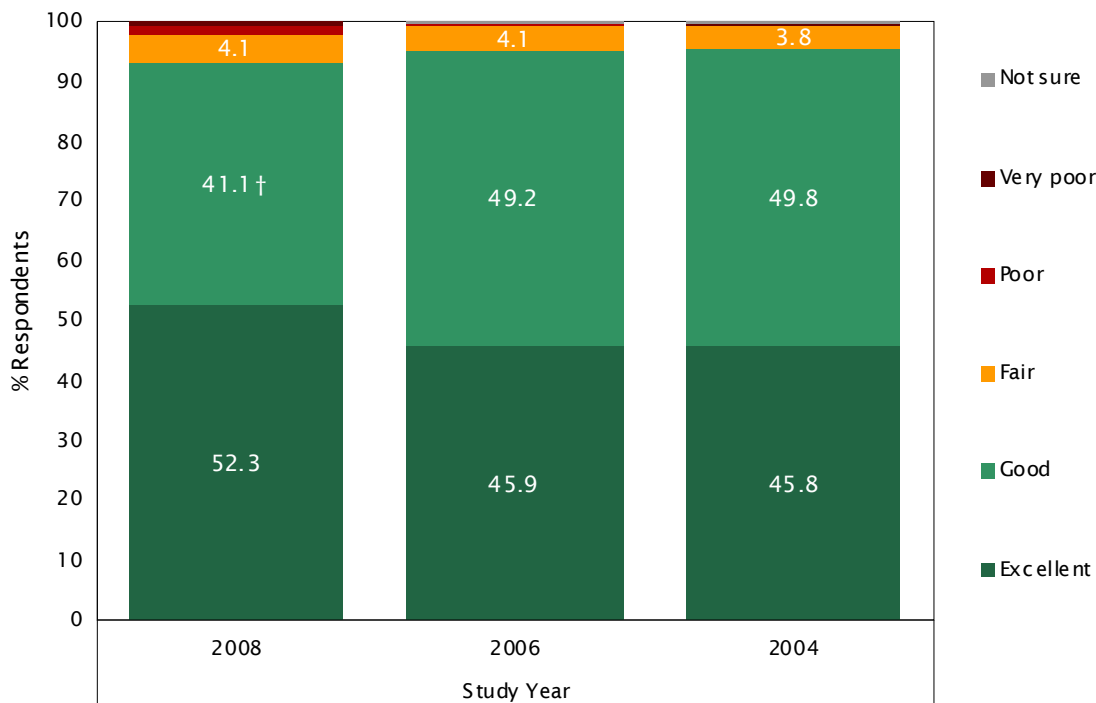
TABLE 2 TOP FIVE ISSUES FACING BUSINESS COMMUNITY (2008 ~ 2000)

Study Year				
2008	2006	2004	2002	2000
Cannot think of any issues	Cannot think of any issues	Cannot think of any issues	Cannot think of any issues	Traffic congestion
National, local economic concerns	Traffic congestion	Traffic congestion	Traffic congestion	National, local economic concerns
Traffic congestion	Taxes / Fees	Competition from other businesses	National, local economic concerns	El Toro Road
Taxes / Fees	Competition from other businesses	Growth / Development	Recent loss of local businesses	Cost of living
Location of City / Access to freeways	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 4, the vast majority of respondents shared very favorable opinions of the quality of life in Lake Forest, with 52% reporting it is excellent, 41% good, and only 4% saying it is fair. Less than 3% of residents indicated that the quality of life in Lake Forest is poor or very poor. Moreover, as shown in the figure, the proportion of respondents who indicated that the quality of life in the City is excellent increased in the past two years.

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 4 OVERALL QUALITY OF LIFE (2008 ~ 2004)



† Statistically significant change ($p < 0.05$) between the 2006 and 2008 studies.

For the interested reader, Figures 5 and 6 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, home ownership status, and the area of the City in which they reside. Although there was some variation in opinion—e.g., those earning \$80,000 or more per year were more likely than their counterparts to view the quality of life as excellent—the most striking pattern in these figures is the relative consistency of opinion. Regardless of subgroup category, respondents generally held a very positive assessment of the quality of life in the City.

FIGURE 5 OVERALL QUALITY OF LIFE BY YEARS IN LAKE FOREST AREA, CHILD IN HOME, HOUSEHOLD INCOME & GENDER

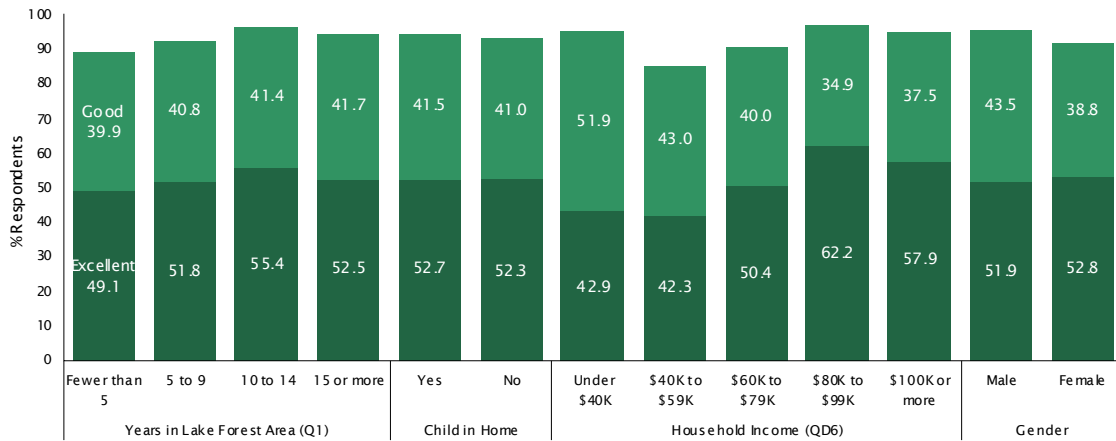
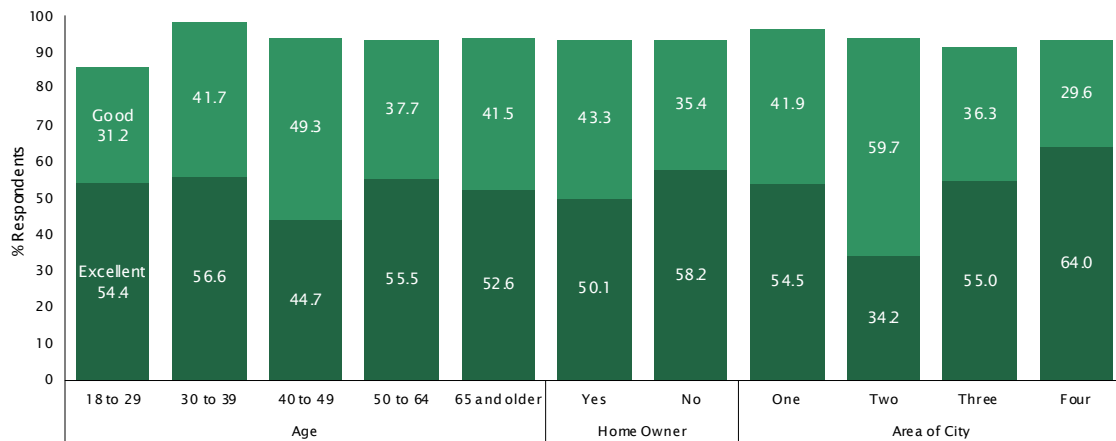


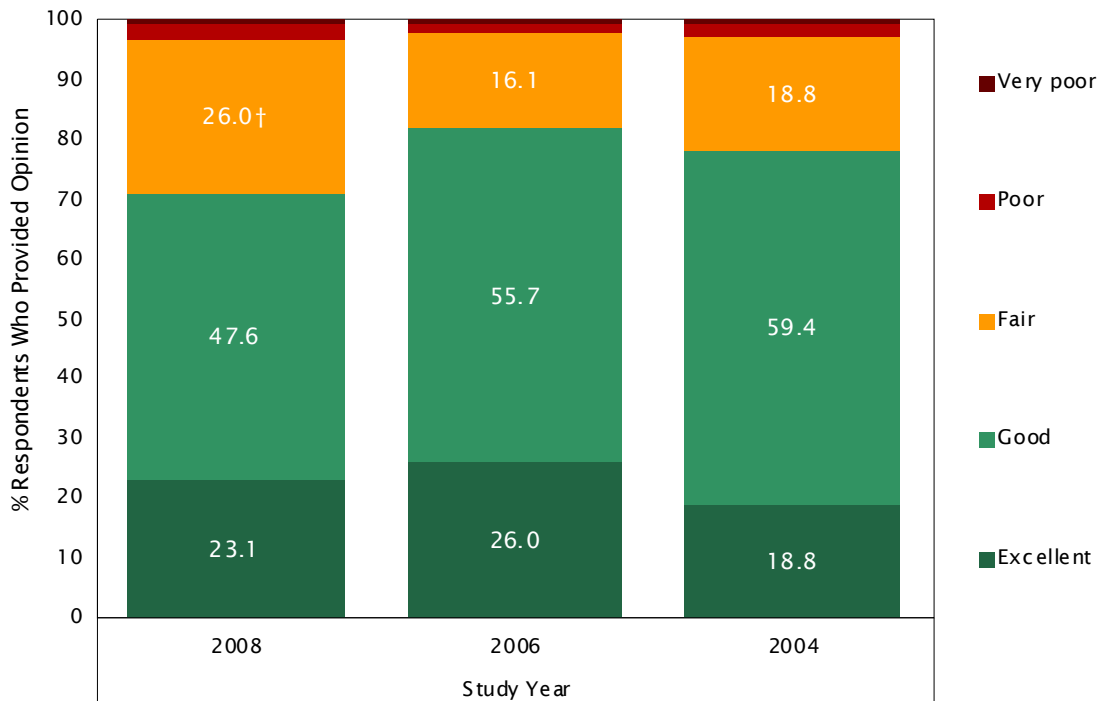
FIGURE 6 OVERALL QUALITY OF LIFE BY YEARS IN AGE, HOME OWNER & AREA OF CITY



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 7, most respondents shared a comparatively favorable opinion of Lake Forest’s business climate. Overall, 23% reported that it is excellent, 48% stated it is good, and 26% offered that it is fair. Just 3% 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 2006, opinions of the business climate in Lake Forest were somewhat less favorable in 2008—undoubtedly a reflection of the recession that has gripped both the State and the Nation during the past year.

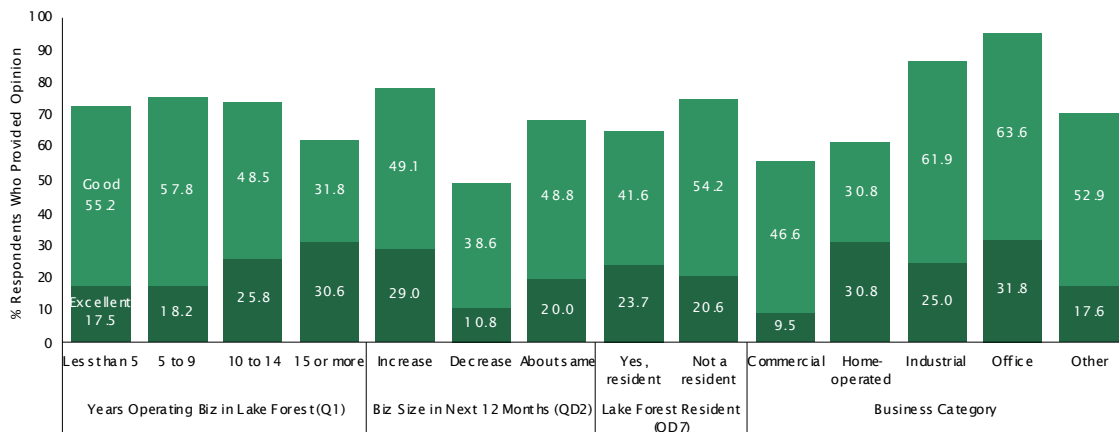
Question 3: Business Survey How would you rate the business climate in Lake Forest compared to other cities in the area? Would you say it is excellent, good, fair, poor, or very poor compared to other cities in the area?

FIGURE 7 QUALITY OF BUSINESS CLIMATE (2008 ~ 2004)



For the interested reader, Figure 8 shows how respondents' rating of the business climate in the City was related to the years they have operated their business in the City, expectations regarding changes in their business size in the next 12 months, whether they personally reside in the City, as well as the type of business they operate.

FIGURE 8 QUALITY OF BUSINESS CLIMATE BY YEARS OPERATING BUSINESS IN LAKE FOREST, BIZ SIZE IN NEXT 12 MONTHS, LAKE FOREST RESIDENT & BUSINESS CATEGORY



OVERALL SATISFACTION

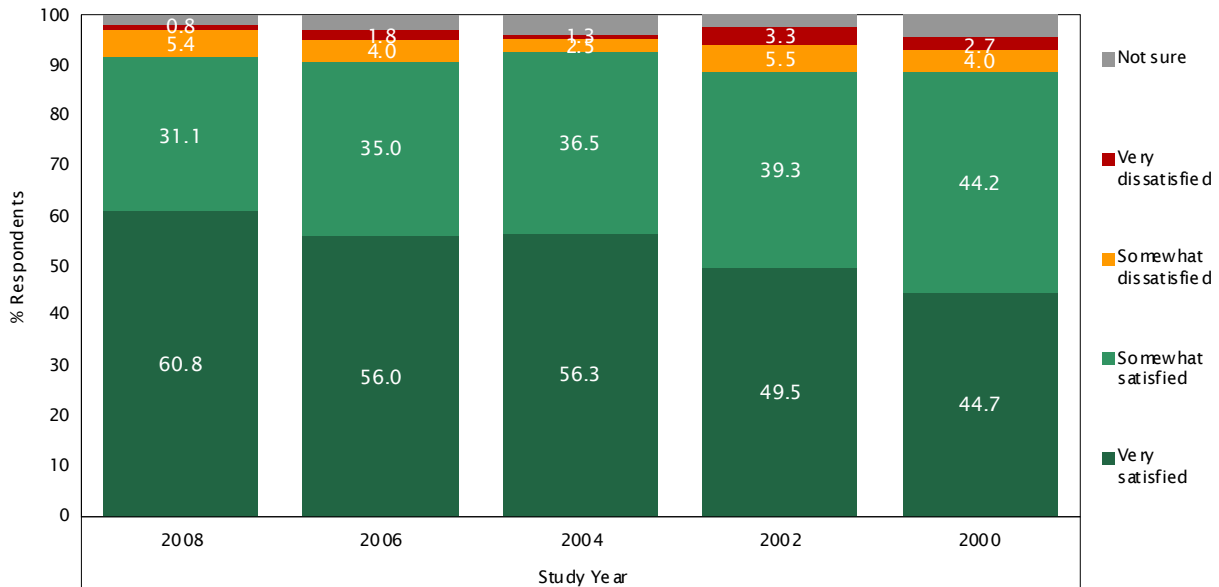
The next series of questions in the surveys addressed respondents' overall level of satisfaction with the job the City of Lake Forest is doing to provide city services, as well as what they most want the City to accomplish in the next two years. Because these questions were asked in an identical manner 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 9 presents the results to this question for the resident survey for 2008 and for prior surveys dating back to 2000, whereas Figure 12 on page 21 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, 92% of residents and 87% of local businesses in 2008 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 61% among residents and from 40% to 49% among businesses between 2000 and 2008.

Question 4: Resident Survey *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

FIGURE 9 OVERALL SATISFACTION: RESIDENT SURVEY (2008 ~ 2000)



For the interested reader, Figures 10 and 11 display how overall satisfaction with the City’s performance in providing municipal services varied by key resident traits. Figures 13 presents similar information for the business community.

FIGURE 10 OVERALL SATISFACTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, CHILD IN HOME, HOUSEHOLD INCOME & GENDER

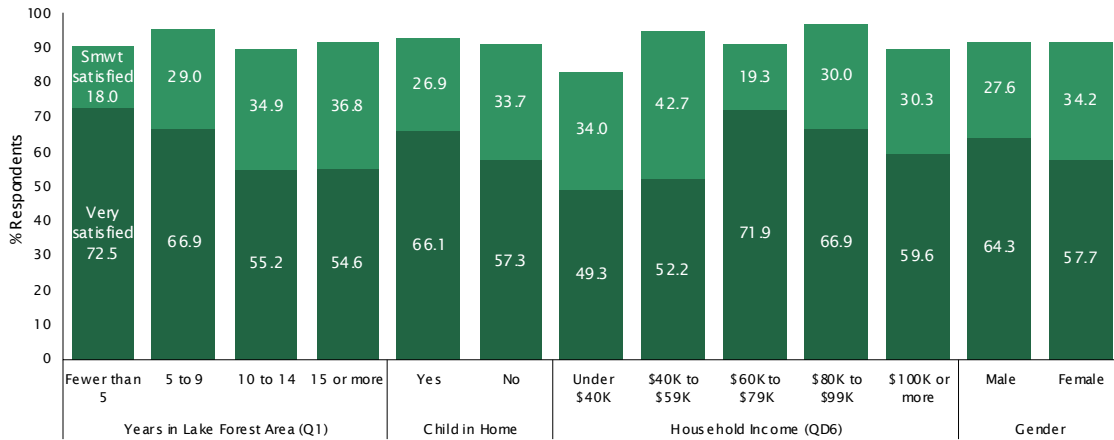
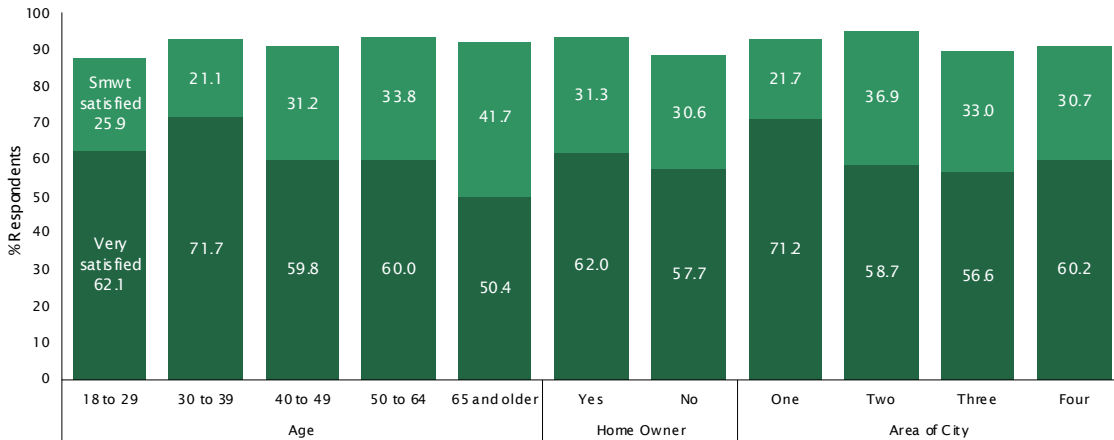


FIGURE 11 OVERALL SATISFACTION: RESIDENT SURVEY BY AGE, HOME OWNER & AREA OF CITY



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 12 OVERALL SATISFACTION: BUSINESS SURVEY (2008 ~ 2000)

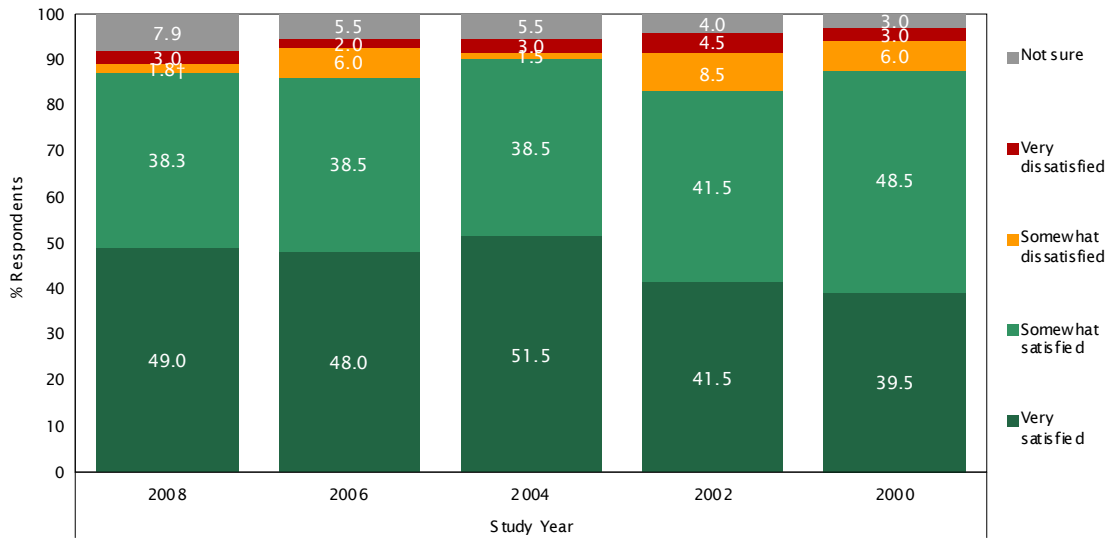
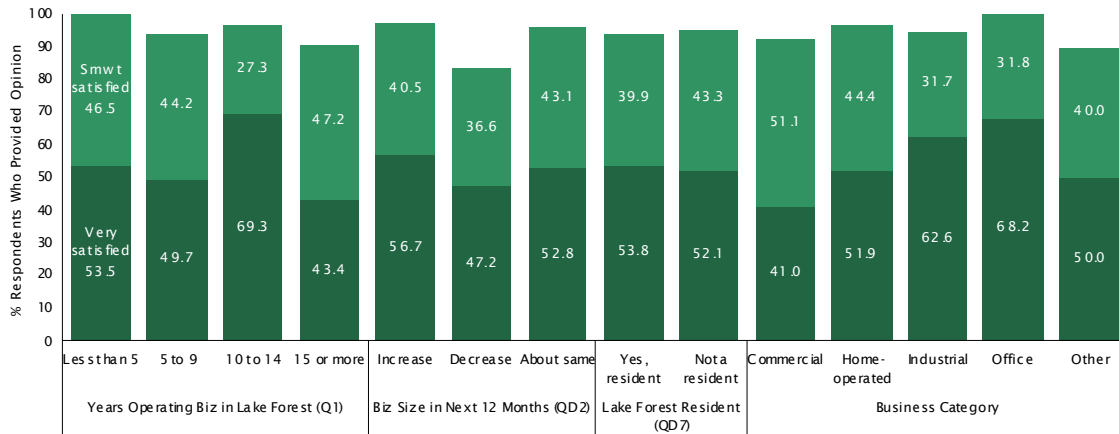


FIGURE 13 OVERALL SATISFACTION: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST, BIZ SIZE IN NEXT 12 MONTHS, LAKE FOREST RESIDENT & BUSINESS CATEGORY



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 14 (Resident) and 15 (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 (12%), followed by increasing crime prevention and public safety (11%), and improving recreation opportunities (5%). Businesses mentioned improved support for/communication with local businesses (12%), redevelop/beautify the City (7%), maintain infrastructure (7%), and reduce taxes/fees (7%). It is

worth noting that 9% of residents and 8% of businesses took the opportunity to provide a favorable assessment of the City’s performance by requesting that the City simply continue doing what it is already doing.

Tables 3 and 4 display the five most common responses to this question in 2008, 2006 and 2004 for the resident and business communities, respectively.

Question 5: 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 14 WANT FROM LAKE FOREST IN NEXT TWO YEARS: RESIDENT SURVEY

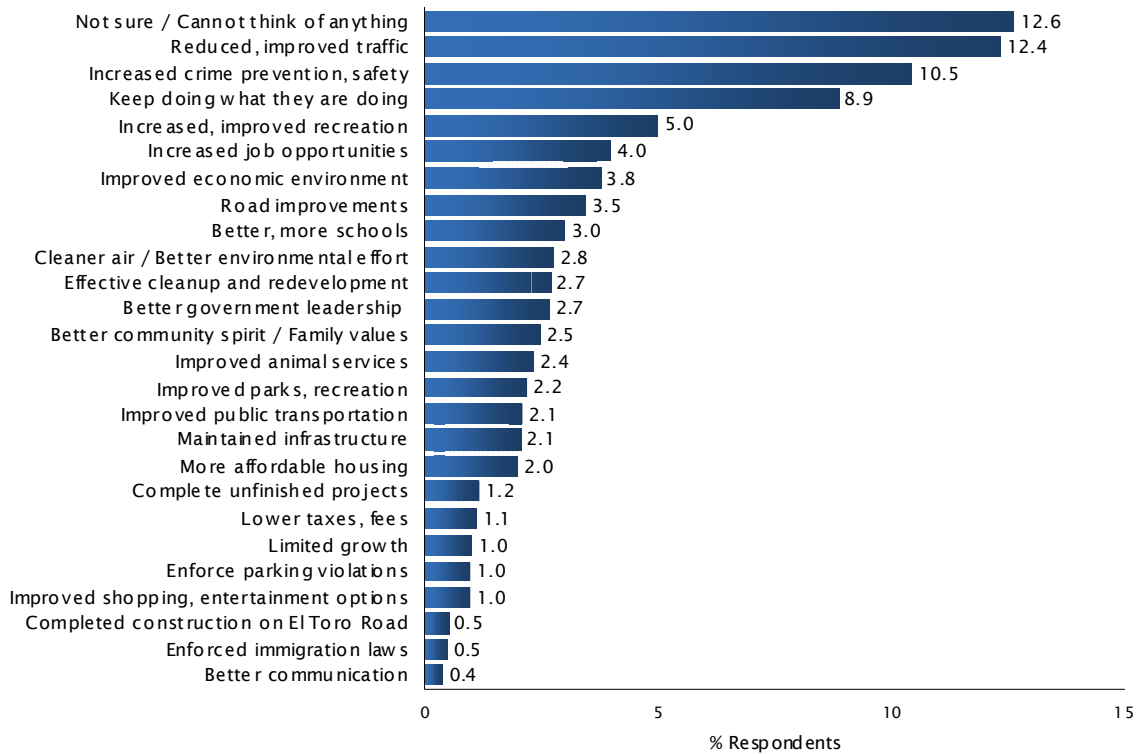


TABLE 3 WANT FROM LAKE FOREST IN NEXT TWO YEARS: RESIDENT SURVEY (2008 ~ 2004)

Study Year		
2008	2006	2004
Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything
Reduced, improved traffic	Reduced, improved traffic	Reduced, improved traffic
Increased crime prevention, safety	Increased crime prevention, safety	Completed construction on El Toro Road
Keep doing what they are doing	Limited growth	Keep doing what they are doing
Increased, improved recreation	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 15 WANT FROM LAKE FOREST IN NEXT TWO YEARS: BUSINESS SURVEY

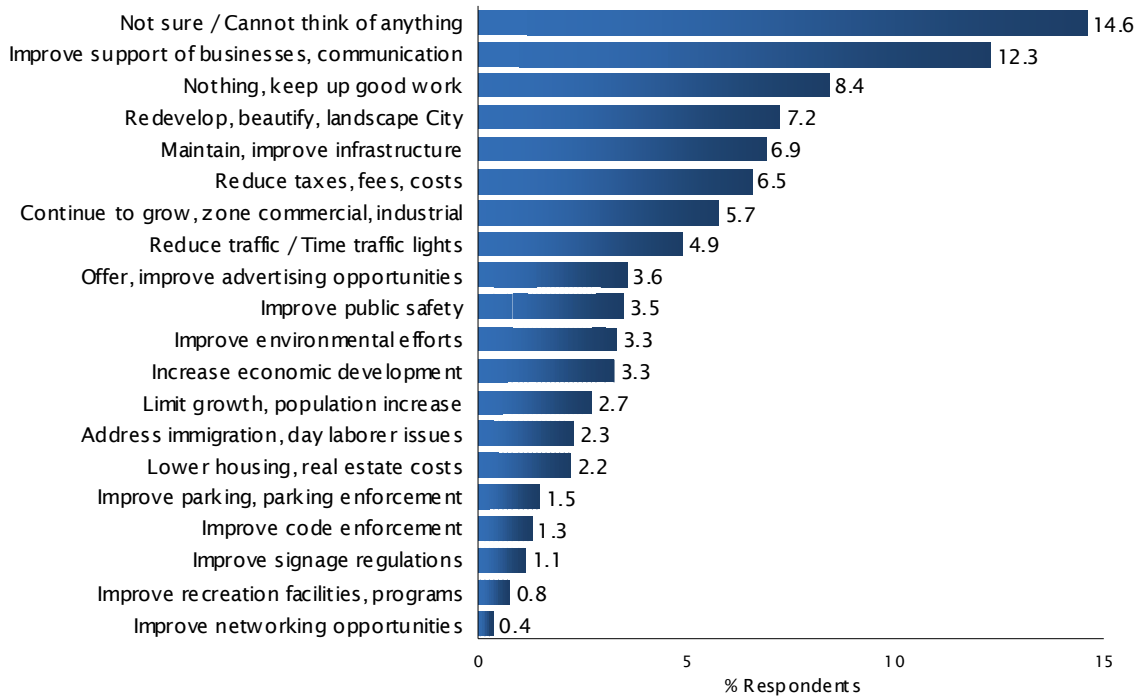


TABLE 4 WANT FROM LAKE FOREST IN NEXT TWO YEARS: BUSINESS SURVEY (2008 ~ 2004)

Study Year		
2008	2006	2004
Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything
Improve support of businesses, communication	Continue to grow, zone commercial, industrial	Reduce traffic / Time traffic lights
Nothing, keep up good work	Reduce traffic / Time traffic lights	Continue to grow, zone commercial, industrial
Redevelop, beautify, landscape City	Nothing, keep up good work	Improve support of businesses, communication
Maintain, improve infrastructure	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 16 presents the services provided by the Police Department 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 (95% extremely or very important), followed by investigating criminal activity (90%), and preparing for emergencies (81%). At the other end of the spectrum, providing animal control services (46%) and enforcing traffic laws (58%) were viewed as comparatively less important. Table 5 displays the percentage of respondents who were satisfied with each service for 2008 and 2006, as well as the difference between the two studies. Just one of the differences was statistically significant (preparing the City for emergencies).

Question 6: 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.*

FIGURE 16 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY

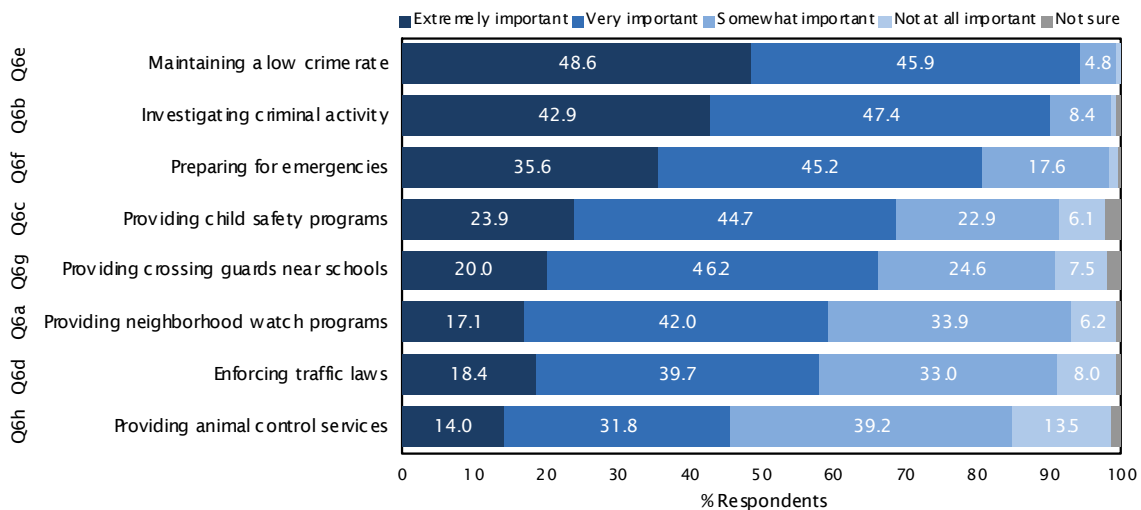


TABLE 5 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY (2008 ~ 2006)

	Study Year		Change in Extremely + Very Important
	2008	2006	
Providing animal control services	45.8	41.7	+4.0
Providing neighborhood watch programs	59.1	56.1	+3.0
Maintaining a low crime rate	94.5	94.4	+0.1
Investigating criminal activity	90.2	92.2	-1.9
Providing child safety programs	68.6	72.0	-3.4
Preparing for emergencies	80.8	85.9	-5.1 †
Enforcing traffic laws	58.1	63.4	-5.4
Providing crossing guards near schools	66.2	71.7	-5.4

† Statistically significant change (p < 0.05) between the 2006 and 2008 studies.

Turning to the satisfaction component, Figure 17 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 17. 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 86% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 70% were very satisfied and 27% 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 (97%), provide child safety programs (94%), and maintain a low crime rate (93%). Table 6 shows how the 2008 results compared with the prior 2006 study. There was one statistically significant change during this period for providing animal control services.

Question 7: 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 17 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY

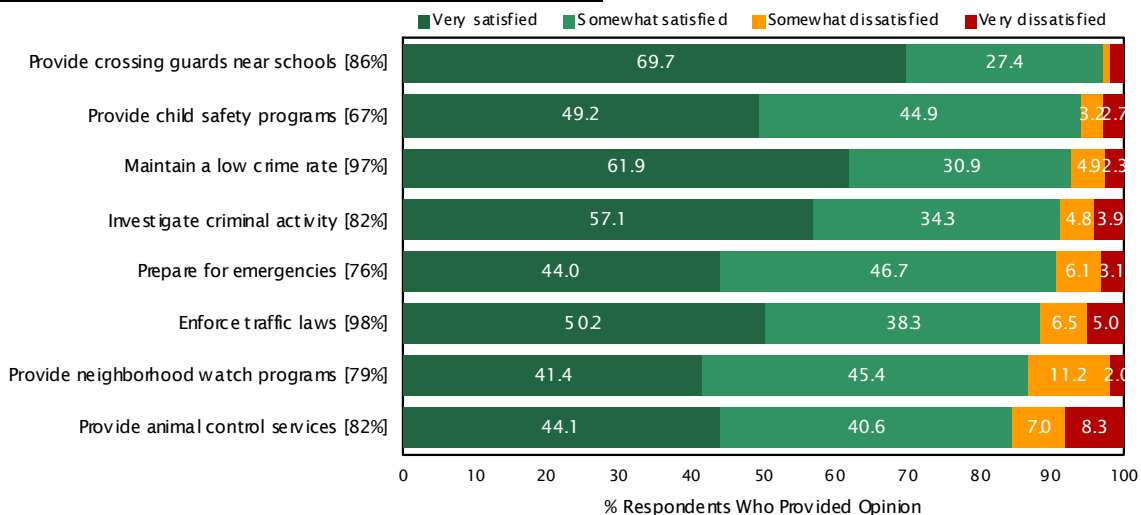


TABLE 6 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY (2008 ~ 2006)

	Study Year		Change in Satisfaction
	2008	2006	
Prepare for emergencies	90.8	89.4	+1.4
Provide crossing guards near schools	97.2	95.8	+1.3
Provide child safety programs	94.1	94.2	-0.0
Provide neighborhood watch programs	86.8	87.6	-0.8
Enforce traffic laws	88.5	90.1	-1.6
Investigate criminal activity	91.3	93.4	-2.0
Maintain a low crime rate	92.8	95.2	-2.4
Provide animal control services	84.7	93.0	-8.3†

† Statistically significant change ($p < 0.05$) between the 2006 and 2008 studies.

DEVELOPMENT SERVICES DEPARTMENT Figure 18 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 (61%), followed by enforcing zoning regulations (48%), issuing building permits (47%), and enforcing sign regulations (40%). When compared to 2006, there were statistically significant decreases in the percentage of respondents who rated enforcing zoning regulations and issuing building permits as extremely or very important (see Table 7).

Question 8: 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.*

FIGURE 18 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY

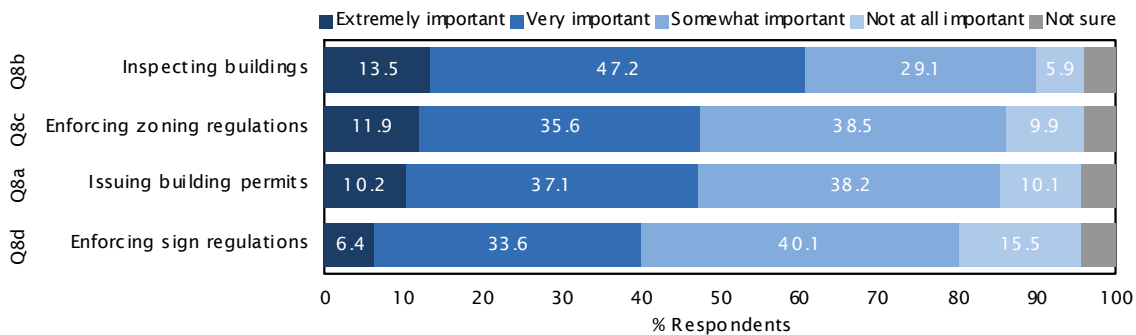


TABLE 7 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY (2008 ~ 2006)

	Study Year		Change in Extremely + Very Important
	2008	2006	
Enforcing sign regulations	40.0	40.2	-0.1
Inspecting buildings	60.7	63.5	-2.8
Enforcing zoning regulations	47.5	55.9	-8.4†
Issuing building permits	47.2	56.6	-9.4†

† Statistically significant change ($p < 0.05$) between the 2006 and 2008 studies.

Figure 19 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 86% for enforcing zoning regulations to a high of 92% for inspecting buildings. When compared to 2006 (see Table 8), residents' satisfaction with the Department's efforts to enforce zoning regulations declined somewhat, whereas satisfaction with the remaining services did not change significantly in the past two years. Satisfaction was also somewhat lower for two 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 9: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to: -----, or do you not have an opinion?*

FIGURE 19 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY

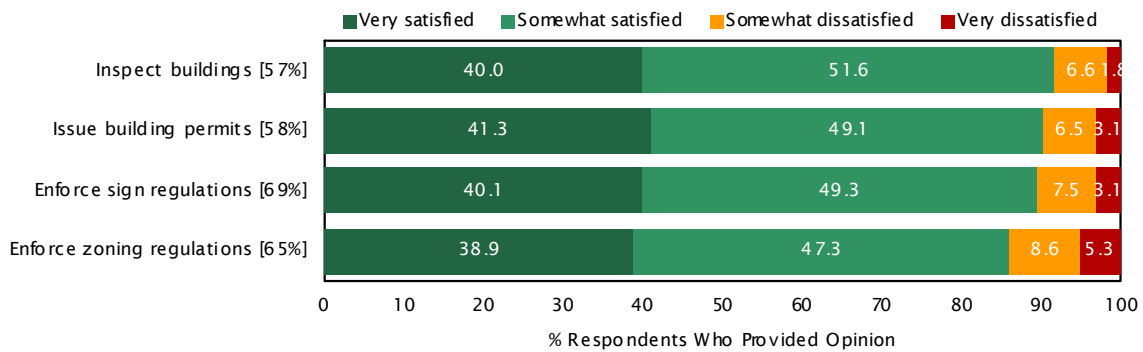


TABLE 8 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY (2008 ~ 2006)

	Study Year		Change in Satisfaction
	2008	2006	
Inspect buildings	91.6	93.3	-1.7
Enforce sign regulations	89.4	92.5	-3.1
Issue building permits	90.4	94.1	-3.7
Enforce zoning regulations	86.1	92.8	-6.7†

† Statistically significant change ($p < 0.05$) between the 2006 and 2008 studies.

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	
Enforce sign regulations	90.4	89.3	+1.1
Issue building permits	90.9	90.3	+0.6
Enforce zoning regulations	79.2	86.8	-7.5
Inspect buildings	82.6	92.6	-10.0

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 2008 study was whether a respondent had interacted with the Development Services Department during the past year. As shown in Figure 20, just 8% of residents surveyed indicated that they had interacted with the Department during the 12 months

prior to the survey in 2008, which is slightly lower than the 11% recorded in 2006. When compared to their respective counterparts, interaction with the Development Services Department during this period was most frequently reported by those who had resided in the City at least 15 years, seniors, and those who reside in Area One or Area Two (see Figure 21).

Question 10: 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 20 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY (2008 ~ 2006)

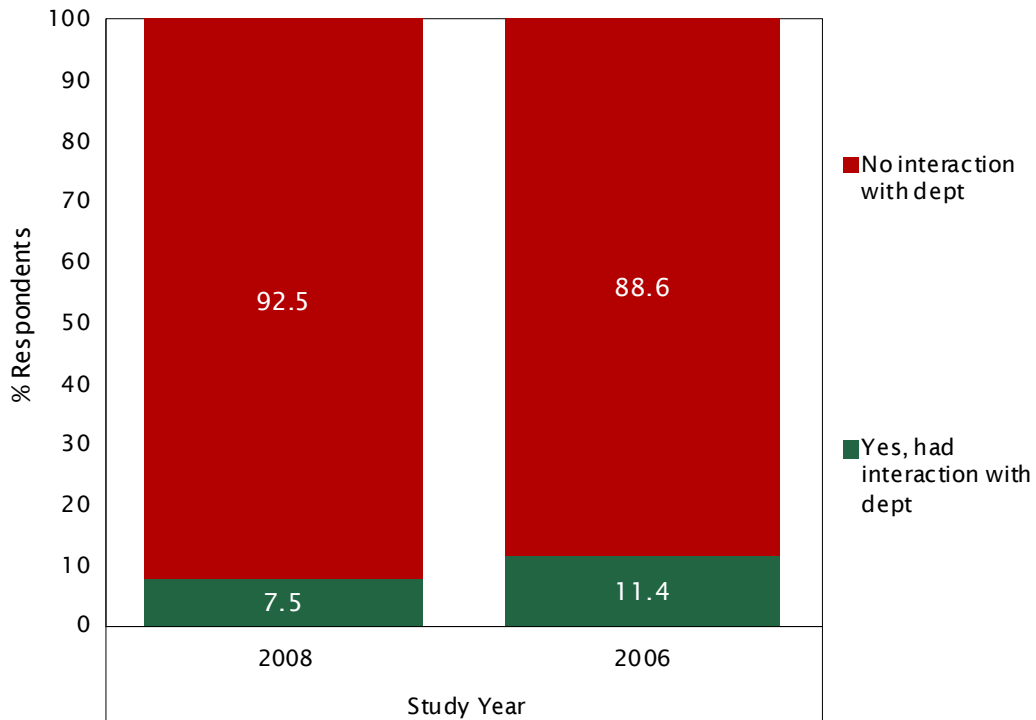
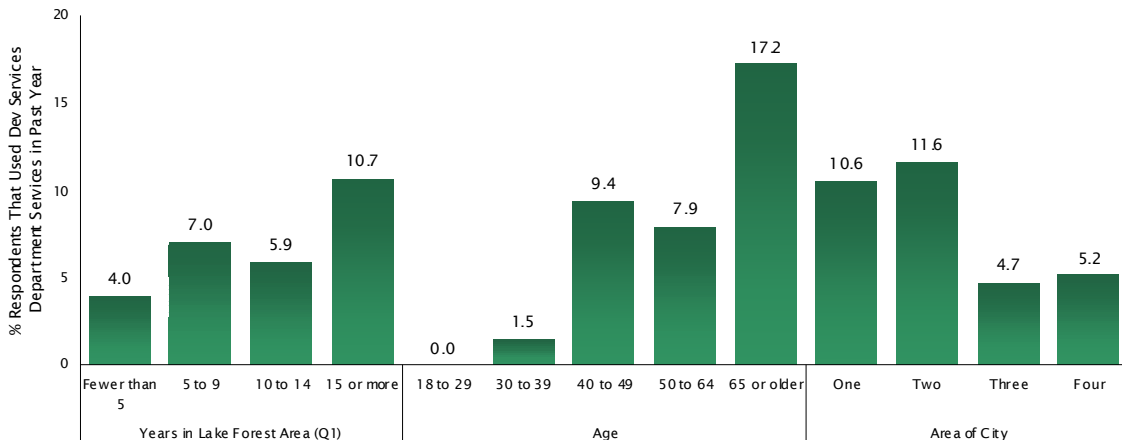


FIGURE 21 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AGE & AREA OF CITY



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 (92%), followed by providing garbage and recycling services (87%), and reducing traffic congestion (84%). When compared to 2006, the importance assigned to reducing traffic congestion decreased significantly (see Table 10).

Question 11: 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.

FIGURE 22 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY

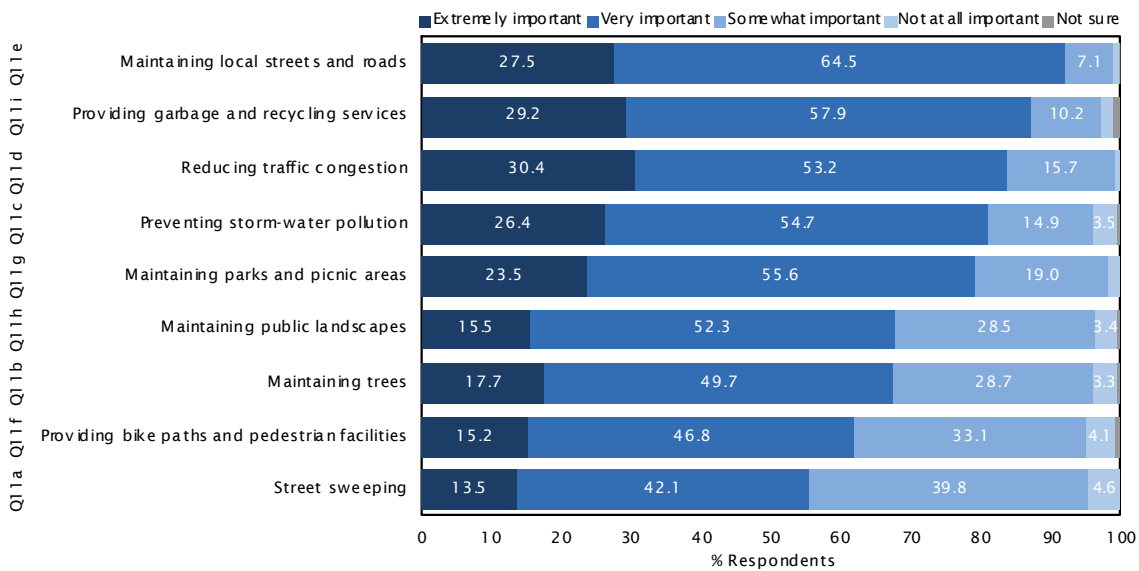


TABLE 10 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY (2008 ~ 2006)

	Study Year		Change in Extremely + Very Important
	2008	2006	
Providing garbage and recycling services	87.1	84.9	+2.2
Preventing storm-water pollution	81.1	79.0	+2.2
Maintaining parks and picnic areas	79.2	77.2	+2.0
Maintaining local streets and roads	92.0	90.8	+1.2
Maintaining public landscapes	67.9	68.5	-0.7
Maintaining trees	67.4	69.4	-2.0
Street sweeping	55.6	59.1	-3.5
Providing bike paths and pedestrian facilities	62.0	68.0	-5.9
Reducing traffic congestion	83.6	89.7	-6.1 †

† Statistically significant change ($p < 0.05$) between the 2006 and 2008 studies.

Figure 23 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 public landscapes (95%), provide street sweeping services (94%), and maintain trees (94%). When compared to 2006, the levels of satisfaction were statistically similar for each service tested for the Public Works Department (see Table 11).

Question 12: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to: -----, or do you not have an opinion?*

FIGURE 23 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY

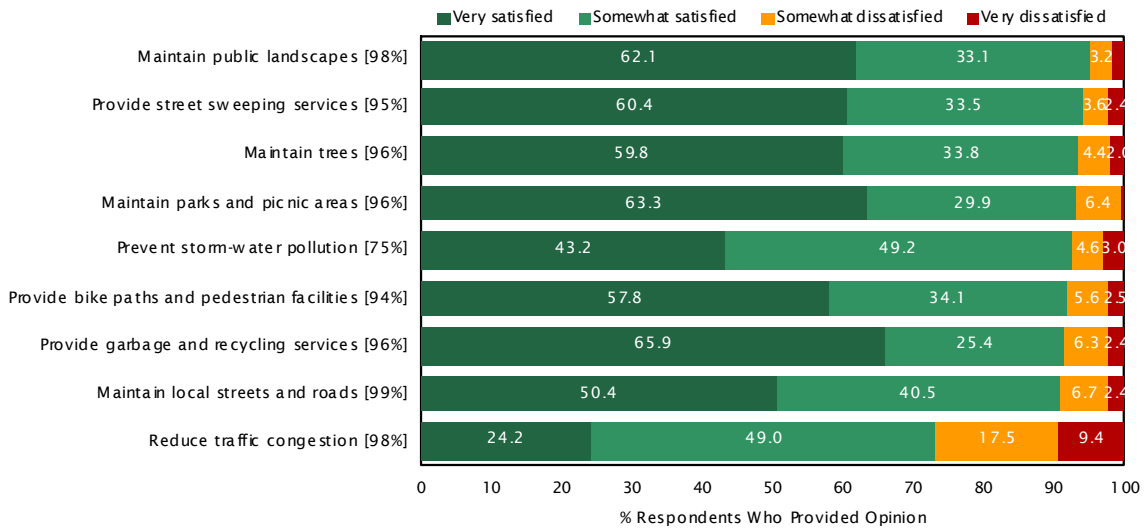


TABLE 11 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY (2008 ~ 2006)

	Study Year		Change in Satisfaction
	2008	2006	
Prevent storm-water pollution	92.4	89.6	+2.8
Reduce traffic congestion	73.1	70.4	+2.7
Maintain trees	93.6	92.5	+1.1
Maintain local streets and roads	90.9	89.9	+1.0
Maintain public landscapes	95.1	94.3	+0.8
Provide bike paths and pedestrian facilities	91.9	91.8	+0.0
Provide street sweeping services	93.9	94.3	-0.4
Provide garbage and recycling services	91.3	94.1	-2.8
Maintain parks and picnic areas	93.2	96.1	-3.0

COMMUNITY SERVICES DEPARTMENT In a format identical to that used in questions 6, 8, and 11, Question 13 asked residents to indicate the level of importance they associated with services provided by the Community Services Department. Figure 24 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 (59%), and providing after school recreation programs (57%). At the other end of the spectrum, providing adult sports programs (25%) and providing adult recreation programs (36%) were viewed as comparatively less important. Although there were some changes in the perceived importance of services between 2006 and 2008, the results were not statistically significant (see Table 12).

Question 13: 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.

FIGURE 24 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY

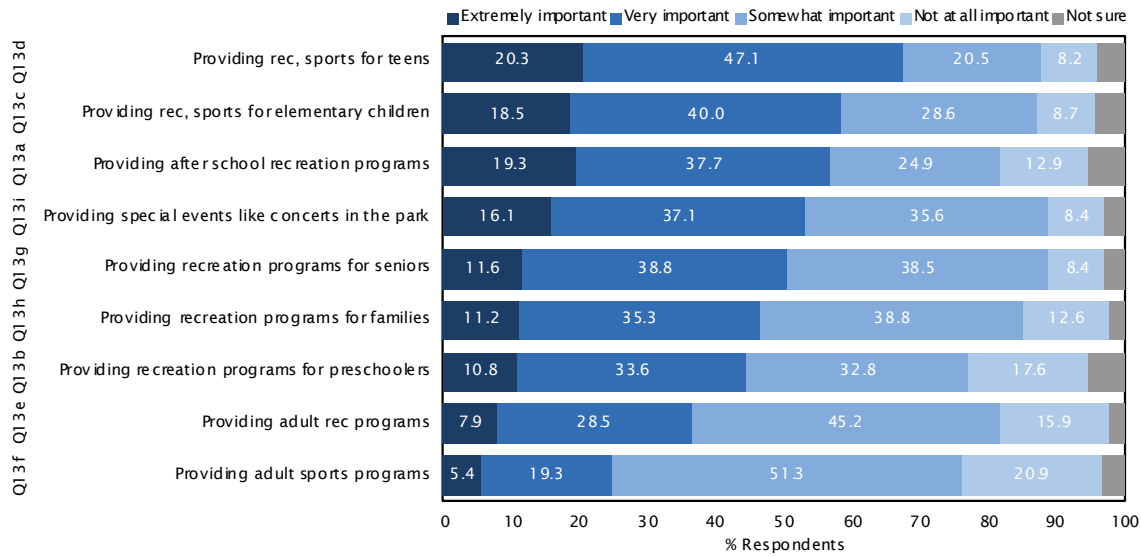


TABLE 12 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY (2008 ~ 2006)

	Study Year		Change in Extremely + Very Important
	2008	2006	
Providing after school recreation programs	57.0	54.7	+2.2
Providing recreation programs for seniors	50.4	49.1	+1.3
Providing recreation programs for pre-schoolers	44.4	43.4	+1.0
Providing rec, sports programs for teens	67.3	66.7	+0.6
Providing recreation programs for families	46.4	46.4	-0.0
Providing rec, sports programs for elementary children	58.5	61.0	-2.5
Providing adult sports programs	24.8	28.9	-4.2
Providing adult rec programs	36.3	41.2	-4.9
Providing special events	53.2	58.2	-5.1

When asked about their satisfaction with the same list of services (Figure 25), 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 (96%), followed by recreation and sports programs for seniors (92%) and recreation programs for adults (91%). Residents were somewhat less satisfied with the Department’s efforts to provide adult sports programs (83%) and recreation and sports programs for teens (88%), although even for these services satisfaction exceeded 80%. When compared to the results from 2006, the findings for 2008 were statistically similar (see Table 13).

Question 14: 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 25 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY

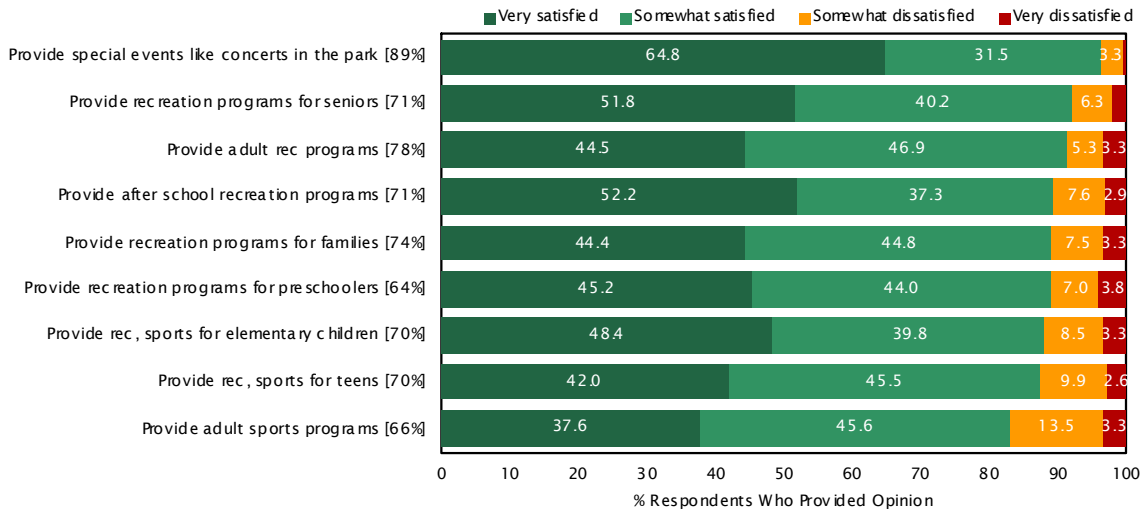


TABLE 13 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY (2008 ~ 2006)

	Study Year		Change in Satisfaction
	2008	2006	
Provide special events	96.3	93.5	+2.7
Provide recreation programs for families	89.3	88.0	+1.2
Provide recreation programs for seniors	92.0	91.1	+0.9
Provide adult sports programs	83.2	83.0	+0.2
Provide adult rec programs	91.4	91.5	-0.1
Provide after school recreation programs	89.5	90.6	-1.1
Provide rec, sports programs for teens	87.5	89.7	-2.3
Provide recreation programs for pre-schoolers	89.2	91.9	-2.8
Provide rec, sports programs for elementary children	88.2	91.9	-3.7

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 26 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 (92%) as the most important of the services tested, followed by investigating criminal activity (81%) and promoting economic development (73%). At the other end of the spectrum, the business community viewed providing building inspection services (28%), business education events (29%), and free business consulting services (30%) as comparatively less important. When compared to the 2006 results, the perceived importance of five service areas declined significantly among the business community (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 26 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY

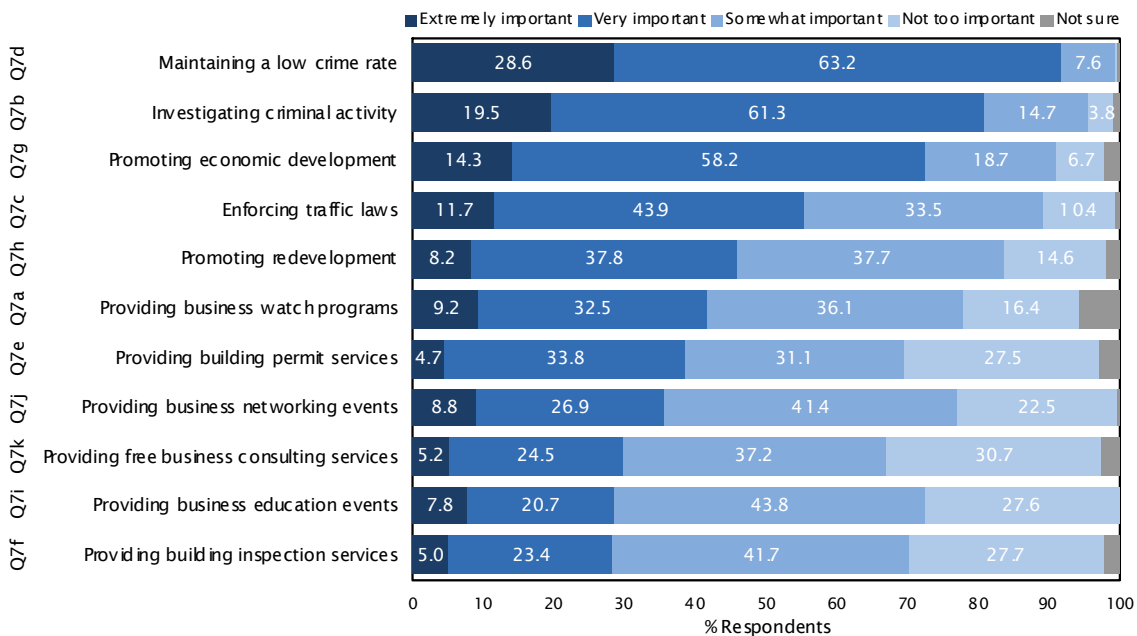


TABLE 14 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY (2008 ~ 2006)

	Study Year		Change in Extremely + Very Important
	2008	2006	
Promoting economic development	72.5	73.0	-0.5
Maintaining a low crime rate	91.7	92.5	-0.8
Providing business networking events	35.7	41.0	-5.3
Investigating criminal activity	80.8	87.0	-6.2
Promoting redevelopment	46.0	53.5	-7.5
Providing business watch programs	41.7	50.0	-8.3
Providing business education events	28.6	39.0	-10.4†
Providing free business consulting services	29.7	40.5	-10.8†
Enforcing traffic laws	55.5	67.5	-12.0†
Providing building permit services	38.5	51.5	-13.0†
Providing building inspection services	28.4	48.0	-19.6†

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 2006 (see Figure 27 and Table 15). At the top of the satisfaction scale was enforcing traffic laws (93%), maintaining a low crime rate (93%), and providing building permit services (93%). Businesses were slightly less satisfied with the City’s efforts to provide business networking events (86%), business consulting services (86%), and promote economic development (87%). When compared to the 2006 study results, satisfaction with the City’s efforts to provide business education events increased significantly (see Table 15).

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 27 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY

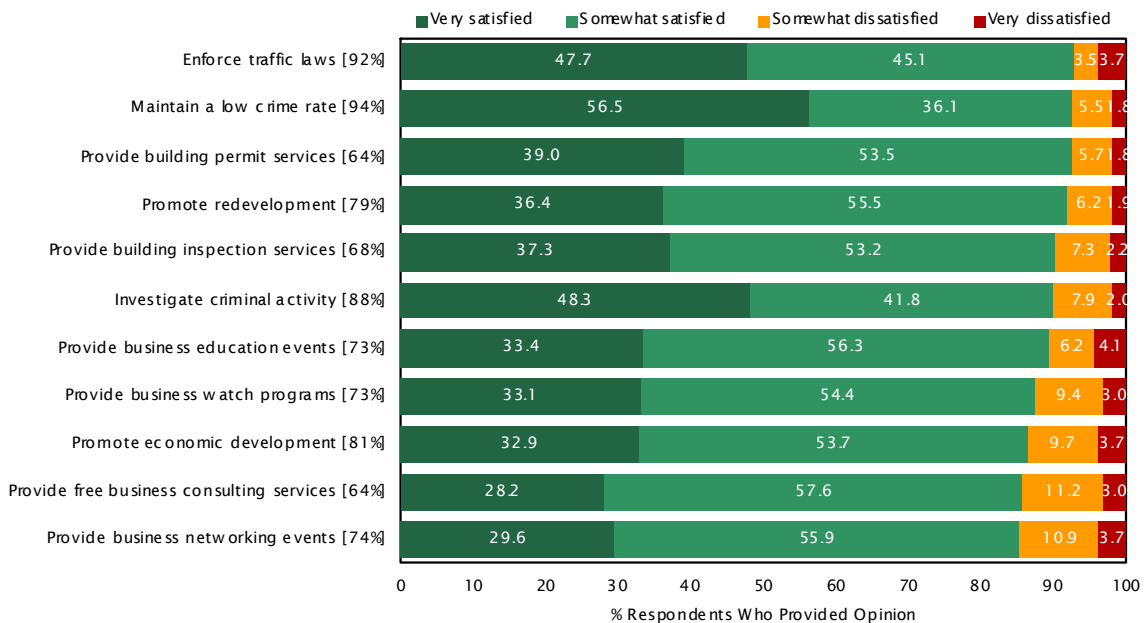


TABLE 15 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY (2008 ~ 2006)

	Study Year		Change in Satisfaction
	2008	2006	
Provide business education events	89.6	82.0	+7.6†
Provide business watch programs	87.5	83.2	+4.3
Enforce traffic laws	92.8	89.0	+3.8
Provide free business consulting services	85.7	82.4	+3.4
Provide business networking events	85.5	85.3	+0.2
Promote redevelopment	91.9	92.4	-0.5
Provide building permit services	92.5	93.9	-1.5
Maintain a low crime rate	92.6	94.1	-1.5
Investigate criminal activity	90.1	92.2	-2.1
Provide building inspection services	90.5	92.8	-2.3
Promote economic development	86.6	91.7	-5.1

The second list of services, shown in Figure 28, 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 (82%), followed by reducing traffic congestion (73%), and landscaping medians and other areas of the City (51%). Enforcing sign regulations (35%) and enforcing zoning regulations (41%) were viewed as the least important services among those tested. When compared to the 2006 survey results, the overall importance ratings were significantly lower for all services tested in Question 9 (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 28 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY

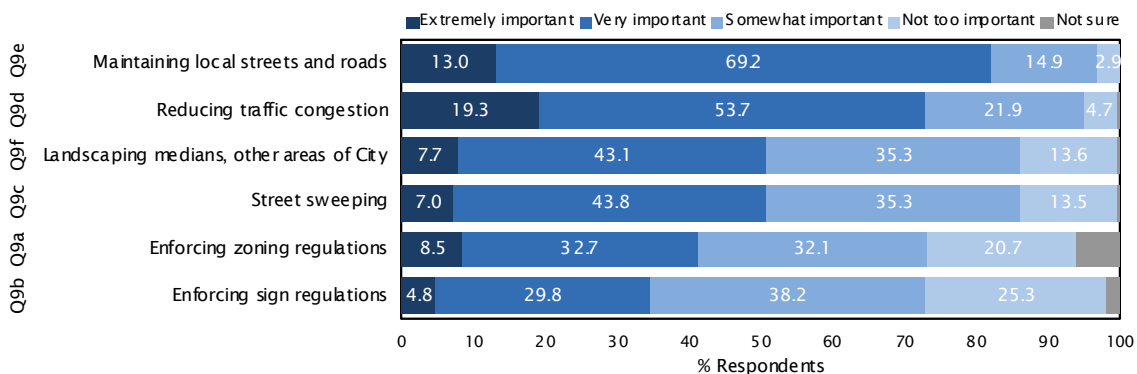


TABLE 16 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY (2008 ~ 2006)

	Study Year		Change in Extremely + Very Important
	2008	2006	
Maintaining local streets and roads	82.2	90.0	-7.8†
Reducing traffic congestion	73.0	81.5	-8.5†
Enforcing zoning regulations	41.2	57.0	-15.8†
Landscaping median strips and other areas	50.8	67.0	-16.2†
Street sweeping	50.8	67.5	-16.7†
Enforcing sign regulations	34.6	55.0	-20.4†

Figure 29 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 landscape medians and other public areas (96%), provide street sweeping (95%), and maintain local streets and roads (94%). Only one service—reducing traffic congestion—stood out with notably lower levels of overall satisfaction (81%), although when compared to the 2006 findings overall satisfaction with the City’s efforts to reduce traffic congestion was significantly higher in 2008 (see Table 17).

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 29 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY

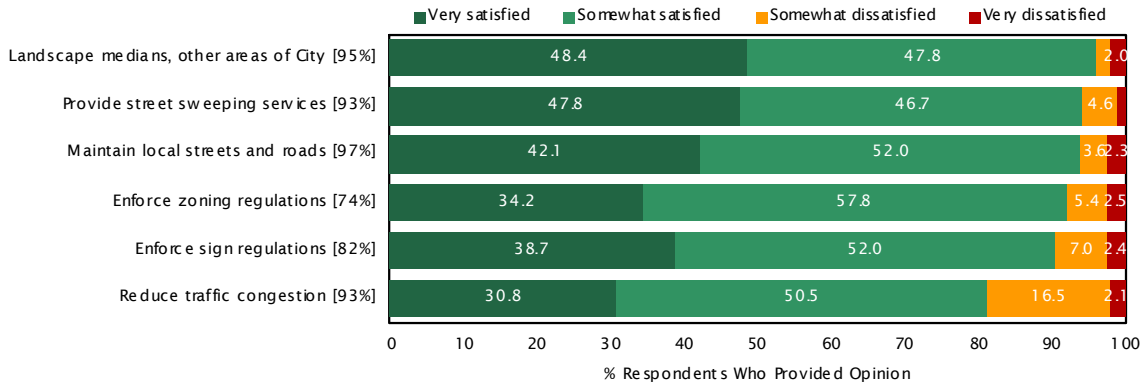


TABLE 17 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY (2008 ~ 2006)

	Study Year		Change in Satisfaction
	2008	2006	
Reduce traffic congestion	81.4	74.3	+7.0†
Landscape median strips and other areas	96.3	93.6	+2.7
Enforce sign regulations	90.6	89.0	+1.7
Maintain local streets and roads	94.1	93.3	+0.8
Provide street sweeping services	94.5	94.1	+0.4
Enforce zoning regulations	92.1	92.6	-0.5



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.² 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.

2. 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 30 presents each of the 30 services tested with residents, along with the percentage of residents who were grouped into each of the six possible categories. Figure 31 provides the same information for the 17 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 5% of residents, moderately meeting the needs of 28% of residents, marginally meeting the needs of 40% of residents, marginally not meeting the needs of 2% of residents, moderately not meeting the needs of 9% of residents, and severely not meeting the needs of 16% 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. Mirroring the results of the open-ended questions, reducing traffic congestion is the top priority for both residents (Figure 30) and businesses (Figure 31).

FIGURE 30 SERVICE NEEDS: RESIDENT SURVEY

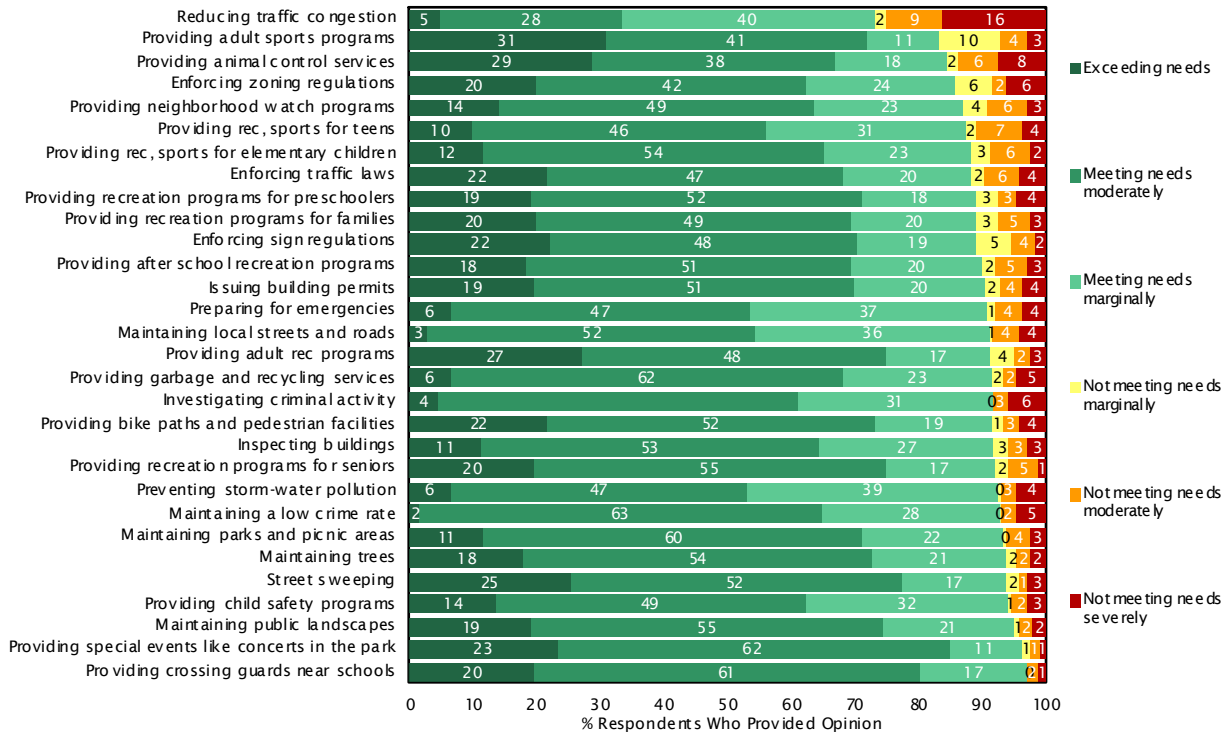
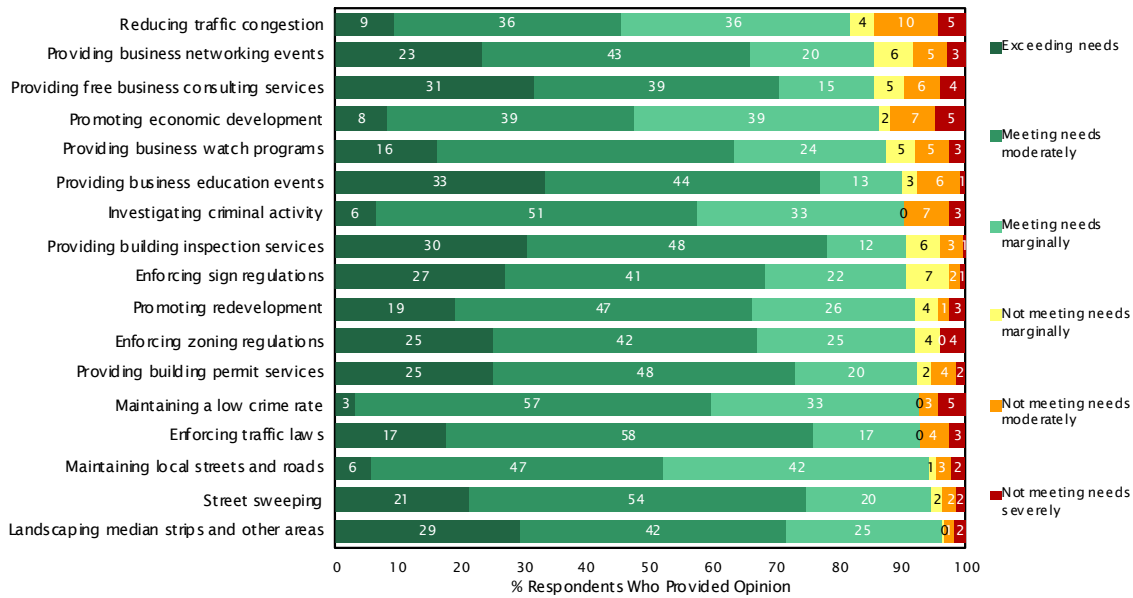


FIGURE 31 SERVICE NEEDS: BUSINESS SURVEY



SPORTS PARK & COMMUNITY CENTER

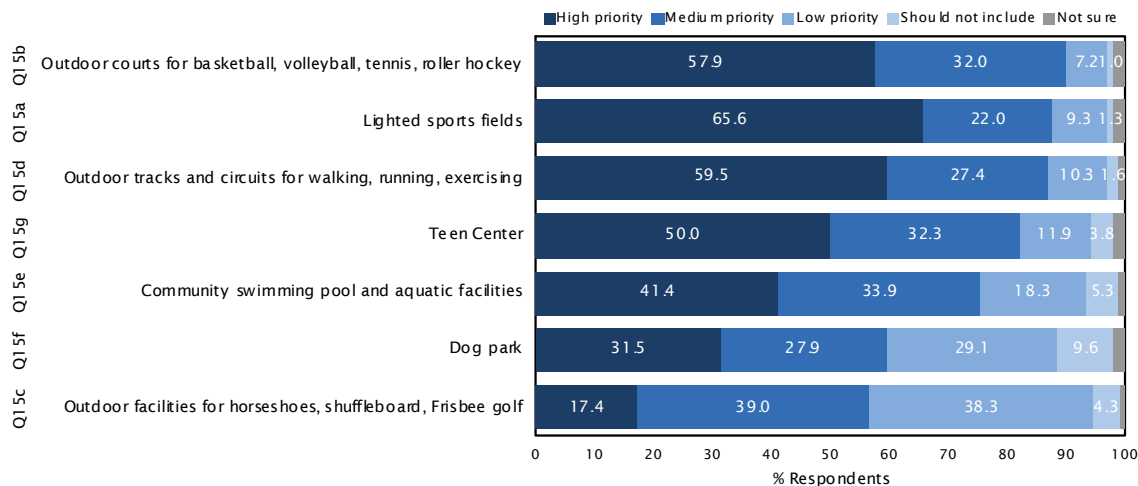
The City of Lake Forest is in the process of planning a 40 acre sports park, and is also planning to build a Community Center. One of the goals of the 2008 survey was to identify the types of facilities and amenities that residents would be most interested in having incorporated into the sports park and Community Center, respectively.

SPORTS PARK For each of the amenities listed on the left of Figure 32, residents were asked to indicate whether they think the amenity should be a high, medium or low priority for inclusion in the sports park. They were also offered the option of indicating that the amenity should *not* be part of the new sports park. To encourage respondents to prioritize—rather than indicate that all of the amenities are a high priority—they were instructed to keep in mind that not all of the amenities can be high priorities.

As shown in the figure, residents were most enthused about having outdoor courts for sports like basketball, volleyball, tennis and roller hockey (90% high or medium priority), followed by lighted sports fields (88%) and outdoor tracks and circuits for walking, running and exercising (87%). A Teen Center (82%) and a community swimming pool/aquatics facility (75%) were also listed as a high or medium priority by at least three-quarters of respondents.

Question 15 *The City of Lake Forest is in the process of planning a major sports park. As I read each of the following amenities, I'd like you to indicate whether you think the amenity should be a high, medium or low priority for inclusion in the park, or if you think it should not be a part of the new sports park. Please keep in mind that not all of the amenities can be high priorities.*

FIGURE 32 SPORTS PARK PRIORITIES



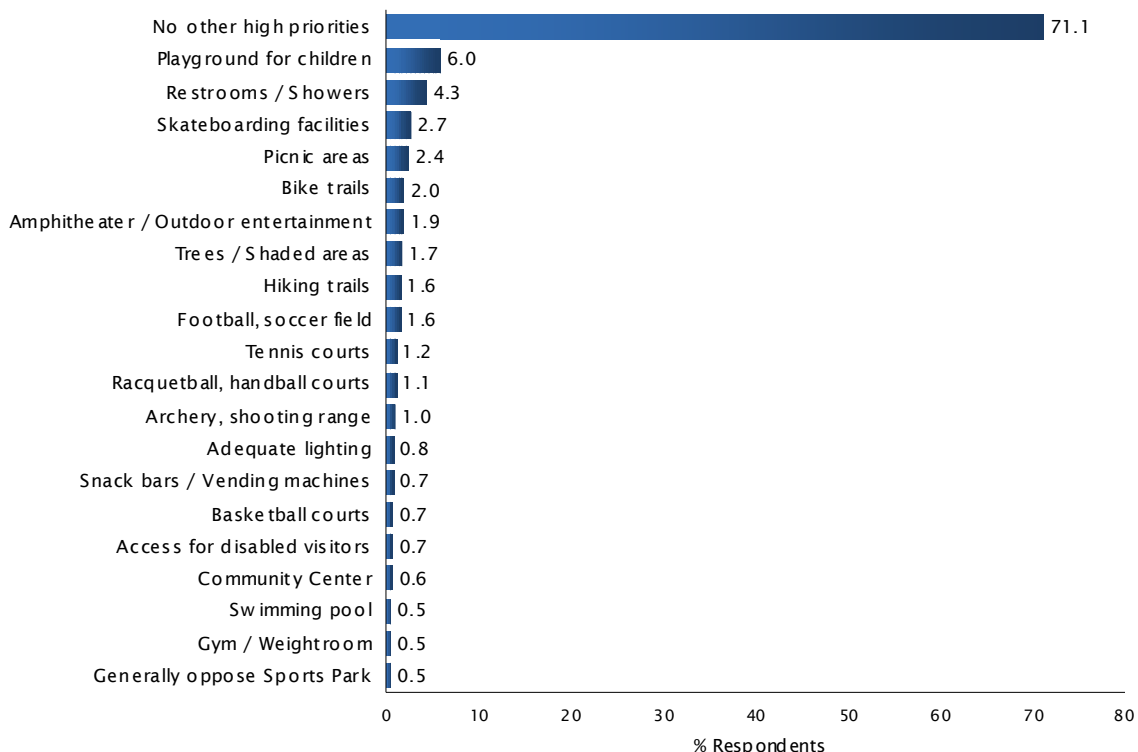
Naturally, residents may vary somewhat with respect to how they would prioritize the types of facilities they want as part of the sports park based on their own recreational interests. The following table shows how the proportion of respondents assigning *high* priority status to an amenity varied by age, whether they live with children, and the area of the City in which they reside.

TABLE 19 SPORTS PARK PRIORITIES BY AGE, CHILD IN HOME & AREA OF CITY (SHOWING % HIGH PRIORITY)

	Age					Child in Home (QD2)		Area of City			
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older	Yes	No	One	Two	Three	Four
Outdoor courts for basketball, volleyball, tennis, roller hockey	61.8	66.5	59.4	56.0	45.3	64.4	53.0	56.8	49.1	58.2	66.7
Lighted sports fields	72.9	74.5	63.0	64.1	56.1	69.3	62.8	67.6	60.7	64.3	70.4
Outdoor tracks and circuits for walking, running, exercising	51.3	68.2	69.5	52.7	52.3	65.5	55.1	47.9	53.0	61.8	72.1
Teen Center	44.7	47.6	59.0	45.3	51.0	54.3	46.7	48.5	55.8	47.8	48.8
Community swimming pool and aquatic facilities	29.0	48.1	46.3	41.1	37.3	44.7	38.9	36.1	43.1	39.5	47.4
Dog park	34.5	31.7	34.6	30.8	24.8	30.1	32.3	25.9	33.4	31.7	34.4
Outdoor facilities for horseshoes, shuffleboard, Frisbee golf	23.0	17.5	10.4	18.3	22.7	12.7	20.8	17.8	19.3	17.6	15.0

Recognizing that the list of amenities provided in Question 15 does not exhaust the list of possibilities that Lake Forest residents may envision for a sports park, respondents were also provided an opportunity to suggest additional amenities for inclusion in the park. Question 16 was asked in an open-ended manner, thereby allowing respondents to mention any amenity that came to mind without being prompted by—or restricted to—a particular list of options. The verbatim responses were later reviewed by True North and grouped into the categories shown in Figure 33.

Question 16 *Are there any particular amenities that I did not mention that you think should be a high priority for inclusion in the Sports Park?*

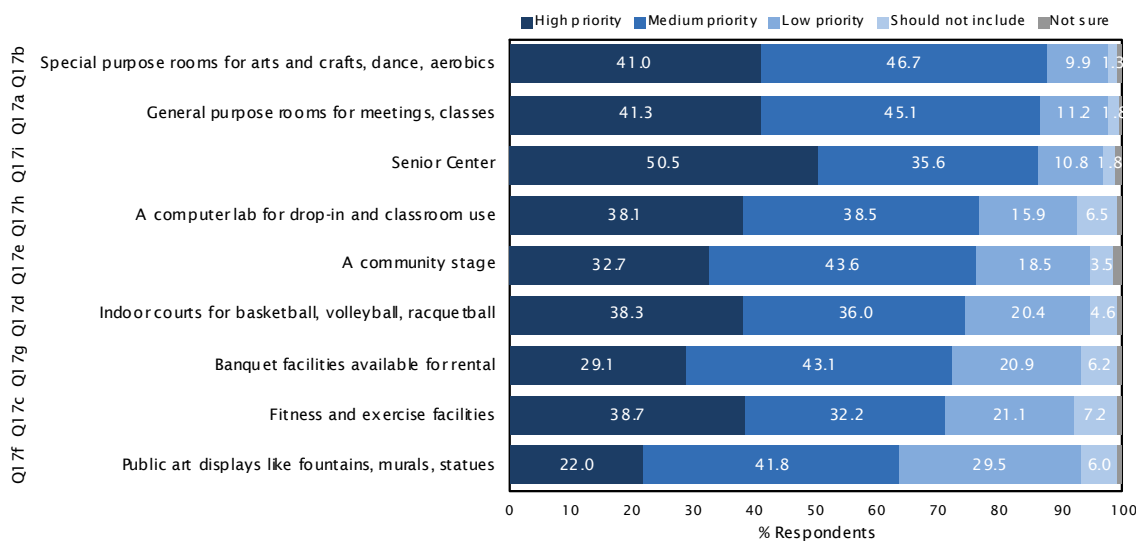
FIGURE 33 ADDITIONAL AMENITIES FOR SPORTS PARK

Nearly three-quarters (71%) of respondents indicated that they could not think of an additional amenity that should be a high priority for inclusion in the park beyond the list that was provided in Question 15. The top three amenities that were mentioned were a playground for children (6%), restrooms/showers (4%), and skateboarding facilities (3%).

COMMUNITY CENTER In a manner identical to that described for the sports park, residents were also asked to prioritize the amenities that could be part of the new Community Center. The list of amenities tested for the Community Center, as well as their respective priority status, are presented in Figure 34. Each of the amenities tested was assigned a high or medium priority by at least 60% of respondents. Overall, residents were most enthused with the prospect of having special purpose rooms that can be used for activities like arts and crafts, dance and aerobics (88%). General purpose rooms for meetings and classes (86%) were also popular, as were a Senior Center (86%), a computer lab (77%), and a community stage (76%).

Question 17 *The City of Lake Forest is also going to build a Community Center. As I read each of the following amenities, I'd like you to indicate whether you think the amenity should be a high, medium or low priority for inclusion in the Center, or if you think it should not be a part of the Community Center. Please keep in mind that not all of the amenities can be high priorities.*

FIGURE 34 COMMUNITY CENTER PRIORITIES



For the interested reader, the following table shows how residents varied in the priority they assigned to each of the Community Center amenities based on their age, whether they had a child in their household, and the location of their residence.

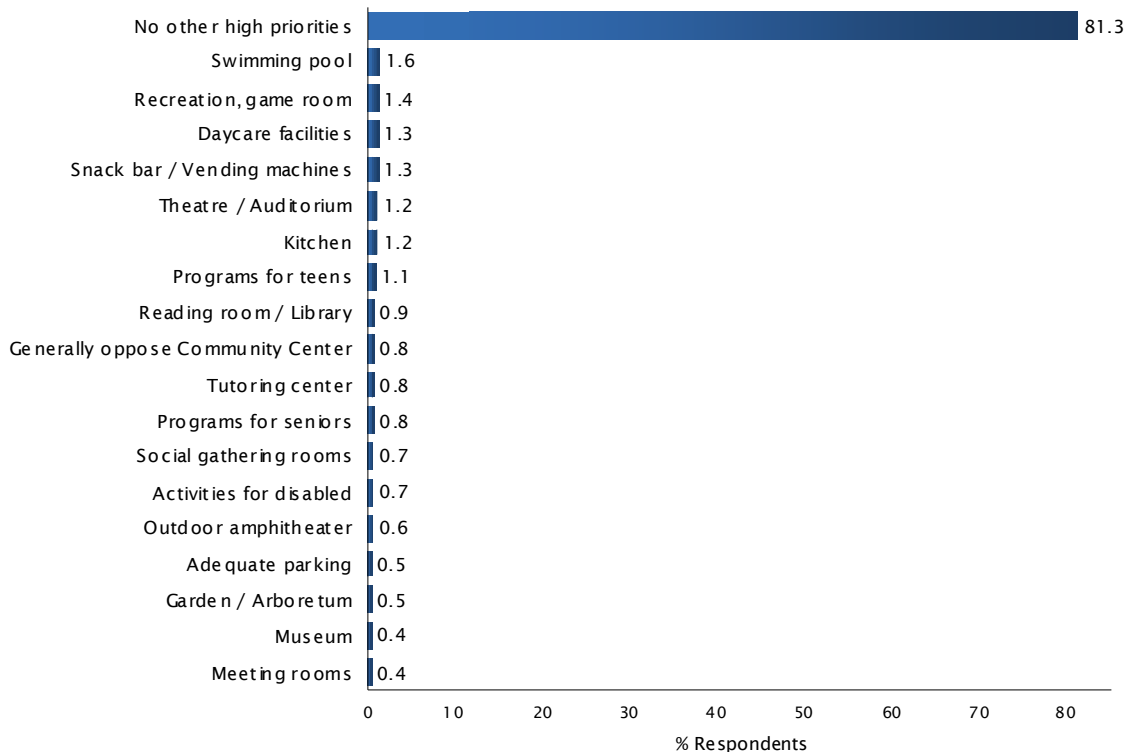
TABLE 20 COMMUNITY CENTER PRIORITIES BY AGE, CHILD IN HOME & AREA OF CITY (SHOWING % HIGH PRIORITY)

	Age					Child in Home (QD2)		Area of City			
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older	Yes	No	One	Two	Three	Four
Special purpose rooms for arts and crafts, dance, aerobics	35.9	42.5	43.4	41.3	39.3	41.9	40.2	39.9	34.8	41.4	47.6
General purpose rooms for meetings, classes	30.4	45.6	49.4	39.8	35.0	44.2	39.0	43.2	34.1	40.0	48.6
Senior Center	38.3	42.8	60.8	51.6	50.0	49.2	51.2	39.1	52.9	51.6	56.2
A computer lab for drop-in and classroom use	42.4	37.4	41.9	34.8	34.7	39.8	36.6	25.5	44.5	38.6	42.1
A community stage	29.7	39.1	41.1	28.7	21.2	39.9	27.4	30.9	24.7	34.9	38.8
Indoor courts for basketball, volleyball, racquetball	51.6	44.1	39.2	32.5	29.3	45.0	33.3	31.1	32.7	39.8	47.6
Banquet facilities available for rental	22.9	32.2	36.9	29.7	16.3	38.9	21.8	28.3	28.0	29.0	31.0
Fitness and exercise facilities	56.7	41.4	36.8	30.4	38.7	37.4	39.4	32.7	42.2	39.1	39.9
Public art displays like fountains, murals, statues	19.4	18.9	18.2	29.6	19.9	17.6	24.8	21.6	15.7	21.2	29.6

The final question in this series provided respondents with an open-ended opportunity to suggest amenities for inclusion in the Community Center beyond those specifically identified in Question 17. The vast majority of respondents (81%) did not offer an additional amenity for consideration as a high priority. Although top mentions included a swimming pool, recreation/game room, and daycare facilities, it is worth noting that no single amenity was mentioned by at least 2% of respondents overall.

Question 18 *Are there any particular amenities that I did not mention that you think should be a high priority for inclusion in the Community Center?*

FIGURE 35 ADDITIONAL AMENITIES FOR CONFERENCE CENTER



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 left of Figures 36 (Resident) and 37 (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.

RESIDENTS Among residents, too many vehicles associated with a single home (42% big or moderate problem) was the most commonly perceived neighborhood problem, followed by illegally parked vehicles (29%) and too many people living in a single house (29%). Excessive noise (21%) and graffiti (19%) rounded-out the top five most prevalent problems. When compared to the 2006 survey findings, there was a statistically significant increase in the percentage of residents who mentioned graffiti as a big or moderate problem, and a significant decrease in the percentage who cited recreational vehicles being parked on the street for more than 72 hours (see Table 21). For the interested reader, Table 22 shows the percentage of respondents who cited each issue as at least a moderate problem by the location of their residence and whether they live in a neighborhood with a home owners’ association (HOA). In general, residents in Area 2 and those whose neighborhood is not managed by an HOA were the most likely to identify each of the issues as a big or moderate problem in their neighborhood.

Question 19: 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 36 RATING LOCAL ISSUES: RESIDENT SURVEY

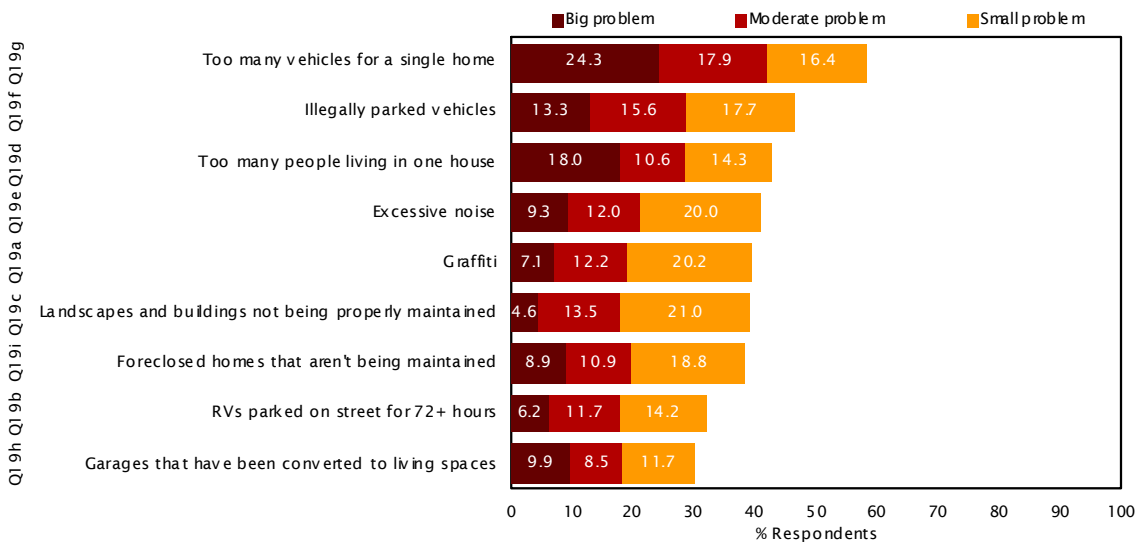


TABLE 21 RATING LOCAL ISSUES: RESIDENT SURVEY (2008 ~ 2006)

	Study Year		Change in Big + Moderate Problem
	2008	2006	
Graffiti	19.3	14.3	+4.9†
Garages that have been converted to living spaces	18.4	15.5	+2.9
Landscapes and buildings not being properly maintained	18.1	15.2	+2.9
Excessive noise	21.3	25.1	-3.9
RVs parked on street for 72+ hours	17.9	25.5	-7.6†
Foreclosed homes that aren't being maintained	19.8	N/A	N/A
Too many people living in one house	28.6	N/A	N/A
Illegally parked vehicles	28.9	N/A	N/A
Too many vehicles for a single home	42.2	N/A	N/A

† Statistically significant change (p < 0.05) between the 2006 and 2008 studies.

TABLE 22 RATING LOCAL ISSUES: RESIDENT SURVEY (SHOWING % BIG + MEDIUM PROBLEM)

	Area of City				Live in HOA (QD3)	
	One	Two	Three	Four	Yes	No
Too many vehicles for a single home	30.9	57.5	38.4	42.8	39.3	49.9
Illegally parked vehicles	19.1	39.3	22.3	37.3	25.9	37.6
Too many people living in one house	23.6	53.5	27.4	10.5	25.3	38.7
Excessive noise	18.9	31.7	21.5	12.9	18.9	28.4
Graffiti	17.7	37.0	17.1	6.6	17.3	25.0
Landscapes and buildings not being properly maintained	16.8	28.1	14.7	14.7	16.4	21.4
Foreclosed homes that aren't being maintained	21.6	23.5	19.2	15.4	18.6	23.9
RVs parked on street for 72+ hours	17.3	18.5	17.4	18.5	17.1	21.0
Garages that have been converted to living spaces	15.6	30.8	13.1	16.8	16.0	26.4

BUSINESSES For the business community, abandoned vehicles (18%), graffiti (16%) and landscapes and/or buildings not being properly maintained (15%) had the highest percentages of respondents indicating that these issues were at least moderate problems in their area. When compared to the 2006 study findings, there were no statistically significant changes in the responses to Question 11 (see Table 23).

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 37 RATING LOCAL ISSUES: BUSINESS SURVEY

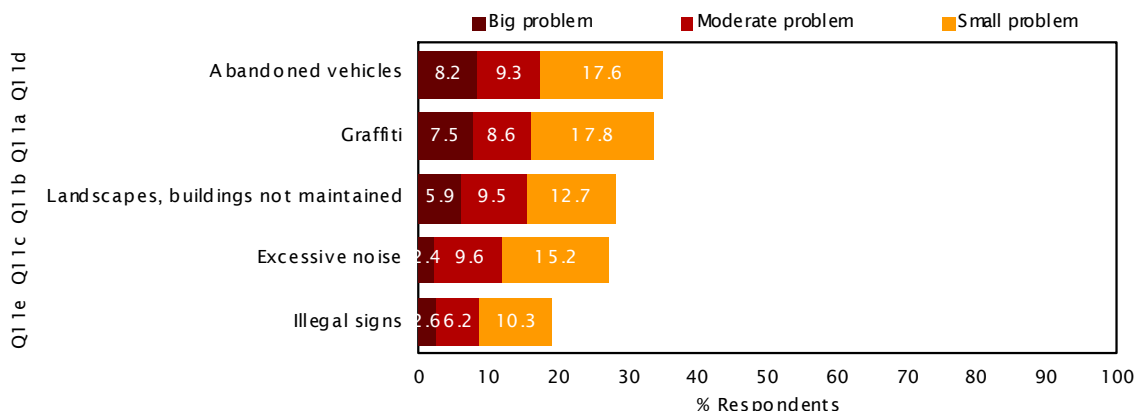


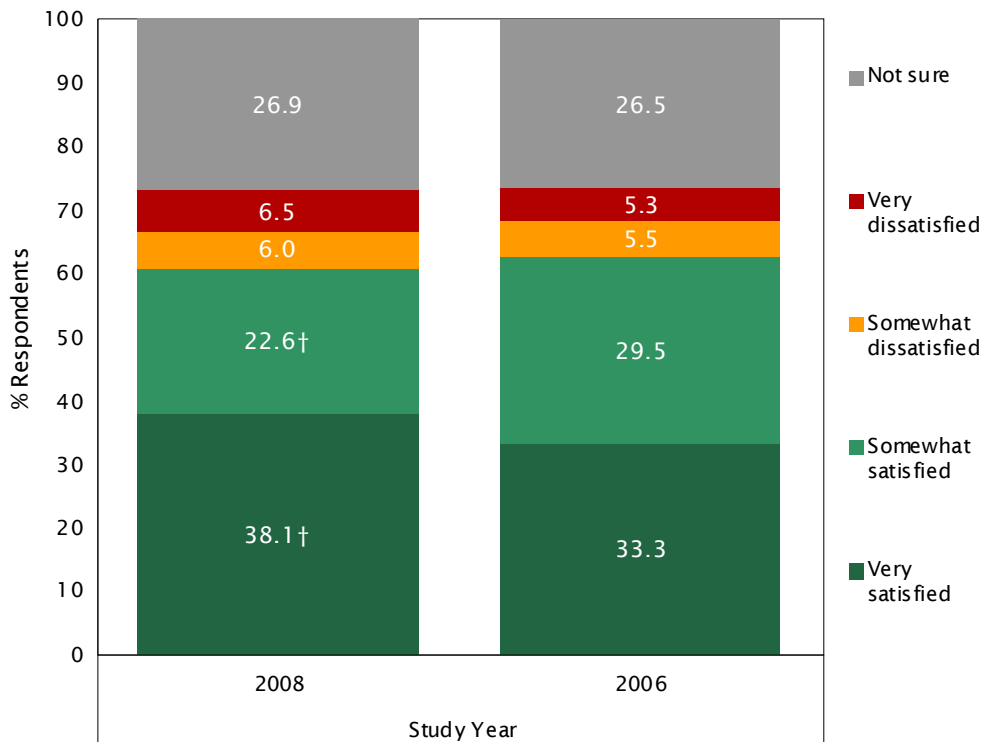
TABLE 23 RATING LOCAL ISSUES: BUSINESS SURVEY (2008 ~ 2006)

	Study Year		Change in Big + Moderate Problem
	2008	2006	
Graffiti	16.1	15.0	+1.1
Abandoned vehicles	17.5	16.5	+1.0
Illegal signs	8.8	10.0	-1.2
Landscapes, buildings not maintained	15.4	19.0	-3.6
Excessive noise	12.0	18.0	-6.0

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 property maintenance 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.

Question 20: 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 38 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY (2008 ~ 2006)



† Statistically significant change ($p < 0.05$) between the 2006 and 2008 studies.

Figure 28 shows that among residents, 27% did not have an opinion regarding the City’s code enforcement efforts. Of those with an opinion, approximately 13% were dissatisfied with City’s efforts in this respect, whereas the remaining respondents were either very (38%) or somewhat (23%) satisfied with the City’s code enforcement efforts. Moreover, the figure also reveals that the intensity of satisfaction with the City’s code enforcement efforts displayed a statistically significant increase in the past two years.

For the interested reader, Figures 39 and 40—which recalculate the percentages among just those with an opinion— show how satisfaction with the City’s code enforcement efforts varied by length of residence in Lake Forest, household income, area of residence, whether one lives in a neighborhood managed by an HOA, and home ownership status.

FIGURE 39 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY BY YEARS IN LAKE FOREST & HOUSEHOLD INCOME

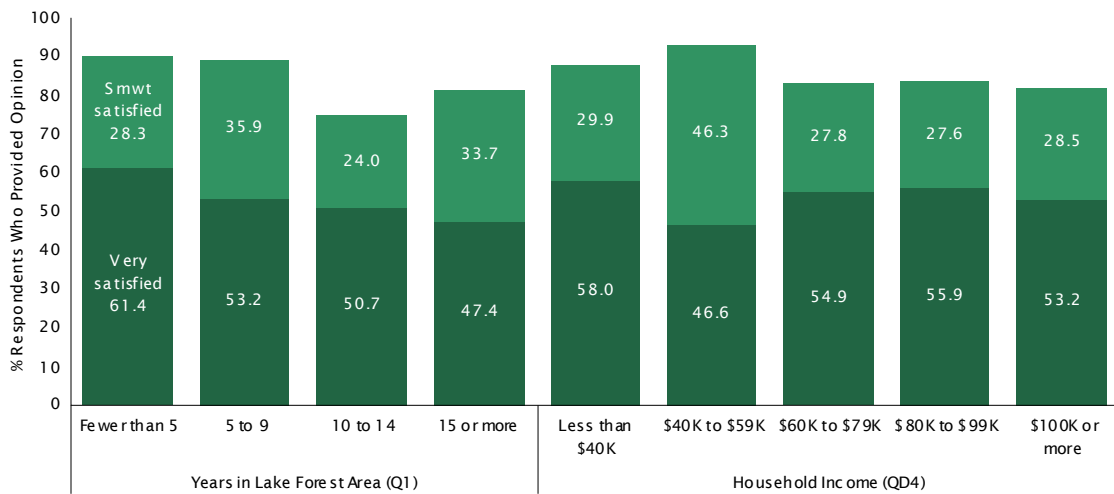
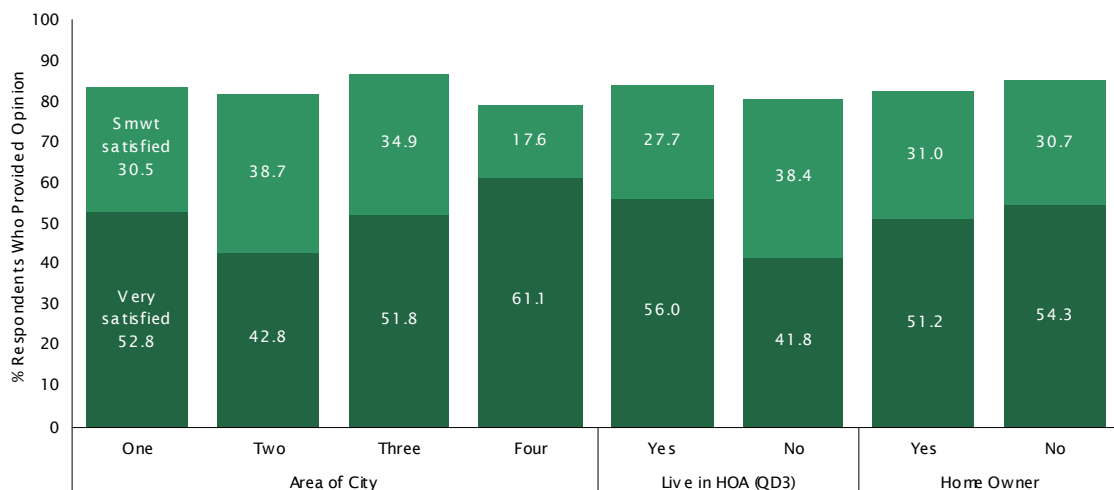


FIGURE 40 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY BY AREA OF CITY, LIVE IN HOA & HOME OWNER



Just over one-third (37%) 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 41). Fifty-six percent (56%) of respondents indicated that they were satisfied, whereas less than 8% stated that they were dissatisfied. Figure 42 presents the satisfaction ratings among just those with an opinion by key business subgroups.

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 41 SATISFACTION WITH CODE ENFORCEMENT: BUSINESS SURVEY (2008 ~ 2006)

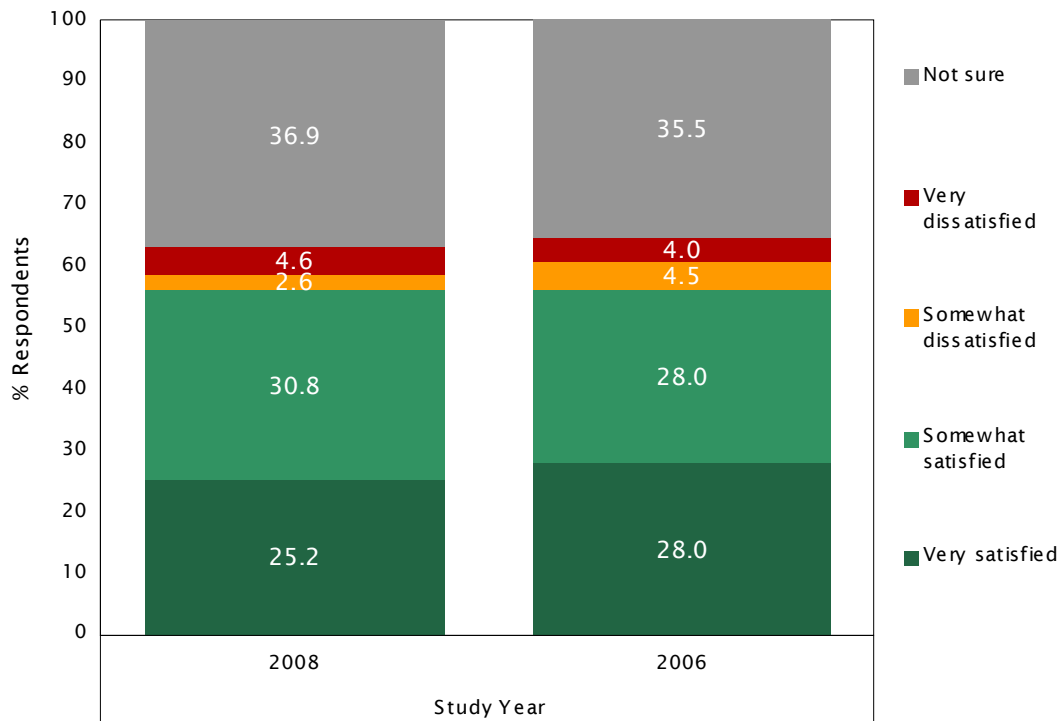
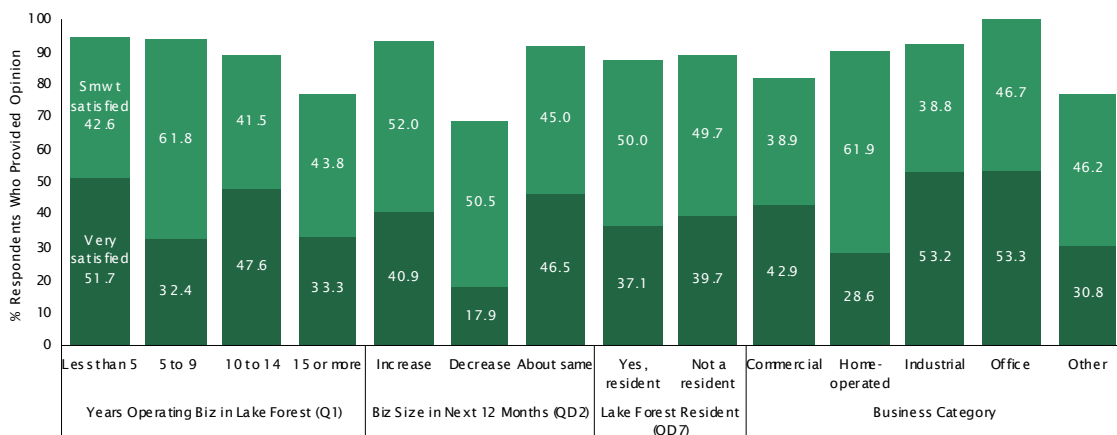


FIGURE 42 SATISFACTION WITH CODE ENFORCEMENT: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST, BIZ SIZE IN NEXT 12 MONTHS, LAKE FOREST RESIDENT & BUSINESS CATEGORY



Question 21: 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 illegal parking, housing issues, lawns, garage conversions, trash in the road and public places, and too many vehicles per property. Sign code enforcement was also mentioned by local businesses.

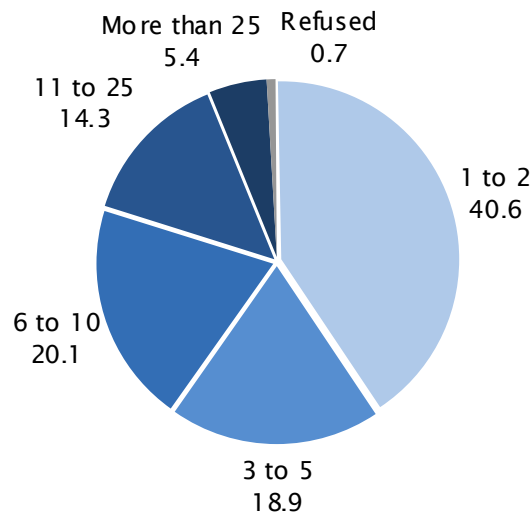
GO LOCAL TRANSIT

The Go Local program is a plan to potentially implement city-initiated transit extensions to the Orange County Transportation Authority's (OCTA) Metrolink commuter rail line. The Metrolink rail line is the backbone of the County's transit system, with two-thirds of the County's population and job centers located within a four mile radius of the county's 10 Metrolink stations. One of the goals of the 2008 Lake Forest business survey was to gather additional information about existing use of the Metrolink, as well as latent demand for the transit service and local businesses' willingness to sponsor Metrolink shuttle services for their employees.

EMPLOYEES & LOCATION OF RESIDENCE The first two questions in this series were designed to gather the necessary background information for understanding existing use of the Metrolink by employees of Lake Forest businesses. The first question (Question 14) simply asked respondents how many people are currently employed at their worksite in Lake Forest. Among all businesses surveyed, the average number of employees was 11.97. Figure 43 displays how Lake Forest businesses distributed into employee size groupings, with the largest single group (41%) being small businesses with up to two employees.

Question 14: Business Survey *How many people are currently employed at your work site in Lake Forest?*

FIGURE 43 NUMBER OF EMPLOYEES



Having identified the number of employees in the business that work in Lake Forest, the survey next inquired as to how many of these employees live outside of Lake Forest and thus commute into the City. On average, businesses reported 5.73 employees who work in Lake Forest but reside outside of the City—or approximately 48% of the average total number of employees per business (11.97). Figure 44 displays how Lake Forest businesses distributed into categories based on the number of employees they have who live outside the City, whereas Figure 45 shows how Lake Forest businesses differ in the percentage of their total workforce that lives outside of the City—for all businesses (left column) and just those with more than one employee (right column).

Question 15: Business Survey *Approximately how many of these employees live outside of Lake Forest?*

FIGURE 44 NUMBER OF EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST

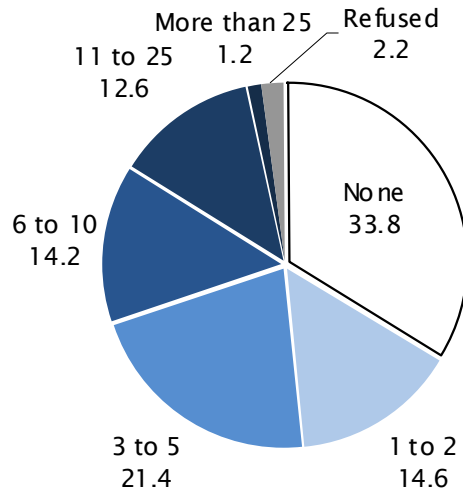
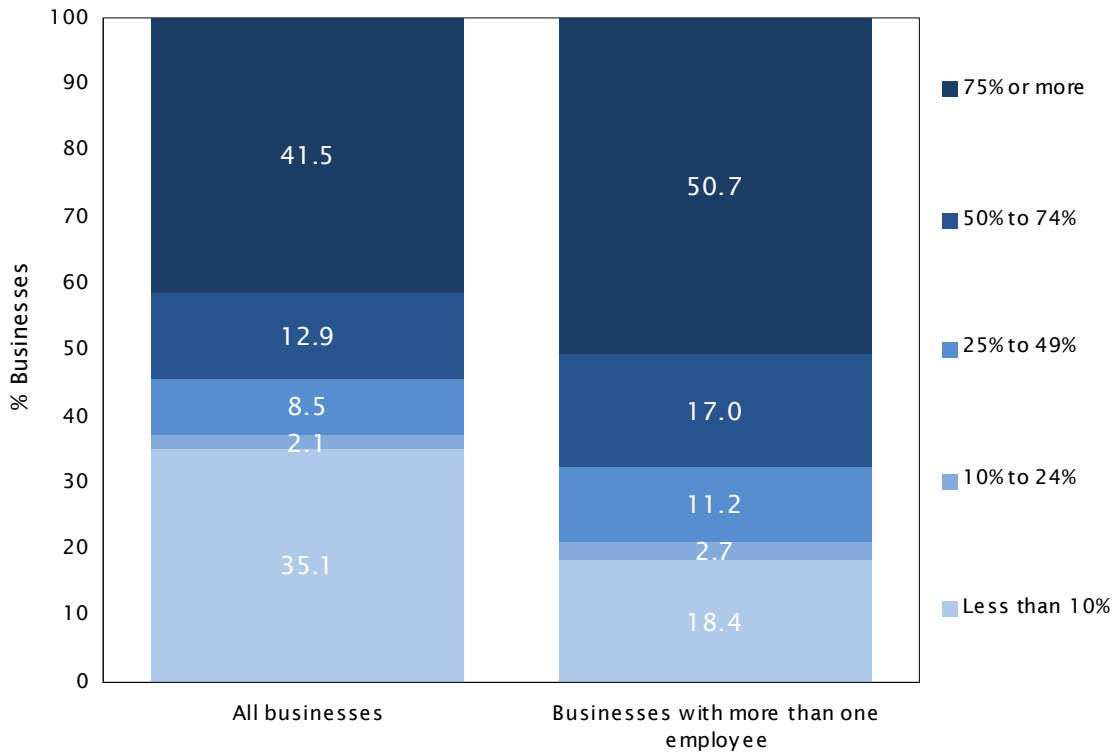


FIGURE 45 PERCENTAGE OF EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST

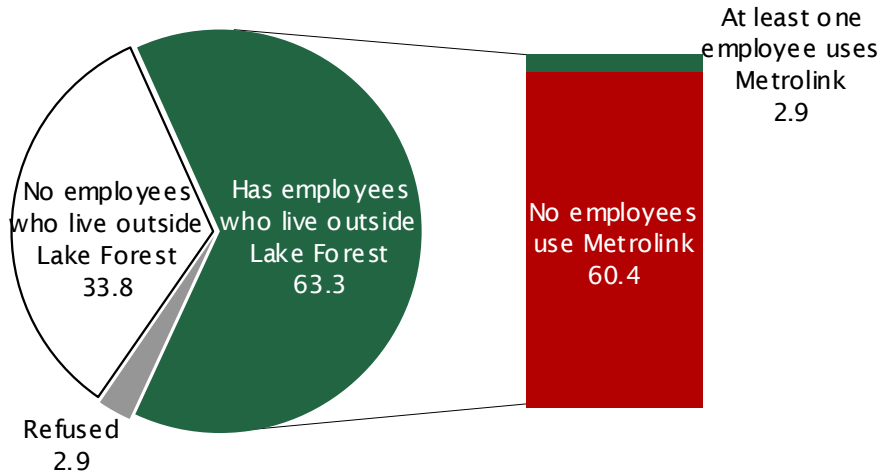


USE OF METROLINK Among businesses that employ people who reside outside of Lake Forest, the survey next asked if any of these employees currently use the Metrolink train to commute to work and—if yes—approximately how many employees use the Metrolink. Figure 46 combines the responses to Questions 14-17 to show that of the 63% of businesses that have employees who commute to Lake Forest from other areas, less than 3% have at least one employee who currently uses the Metrolink. Of the 200 Lake Forest business surveyed that reported 2,377 employees (1,121 of whom commute into Lake Forest), a total of just six employees were identified who currently use the Metrolink.

Question 16: Business Survey *Do any of these employees currently use the Metrolink train to commute to work?*

Question 17: Business Survey *Approximately how many employees currently commute to work on Metrolink?*

FIGURE 46 METROLINK USAGE

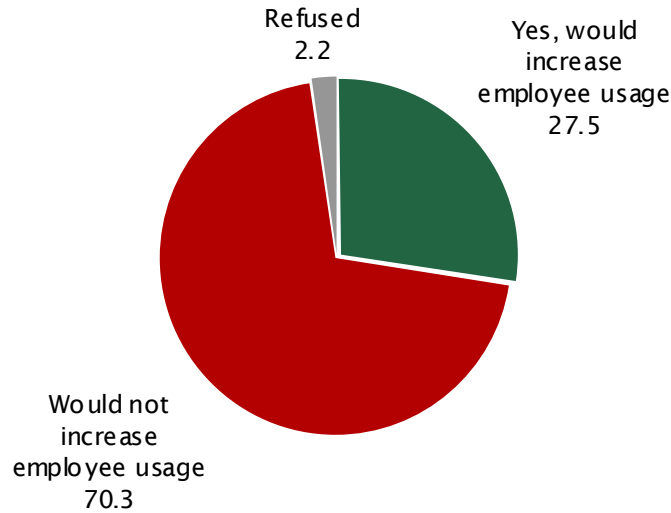


LOCAL SHUTTLES Having measured existing use of the Metrolink by employees of local businesses, the survey next asked businesses with employees who commute from outside Lake Forest whether they expected that use of the Metrolink would increase if there were local shuttles available to transport employees between the Metrolink station and their business site. As shown in Figure 47 on the next page, more than one quarter (28%) of businesses expected that the availability of local shuttles would increase Metrolink usage among their employees.

Figure 48 shows how the 28% of businesses that indicated shuttle service would increase employee use of the Metrolink divided when asked how many of their employees would start using the Metrolink if shuttle service were available. The most common response was one or two employees (13%). Among businesses surveyed, a total of 98 employees were estimated to start using the Metrolink, which represents approximately 9% of the total workforce that commutes into Lake Forest (among businesses surveyed).

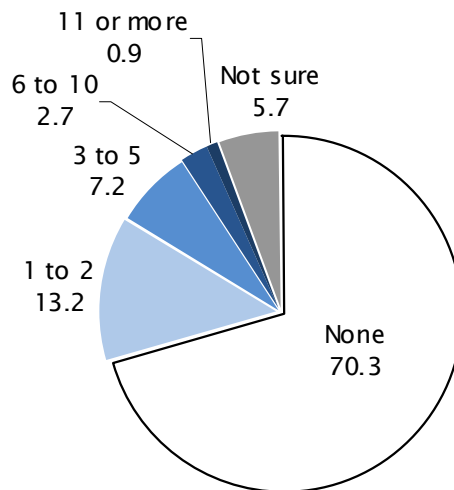
Question 18: Business Survey *If local shuttles were available to transport employees between the Metrolink station and your business site, would it increase the number of employees at your site who use Metrolink?*

FIGURE 47 WOULD LOCAL SHUTTLES INCREASE METROLINK USAGE



Question 19: Business Survey *Approximately how many employees would start using Metrolink if the shuttles were available?*

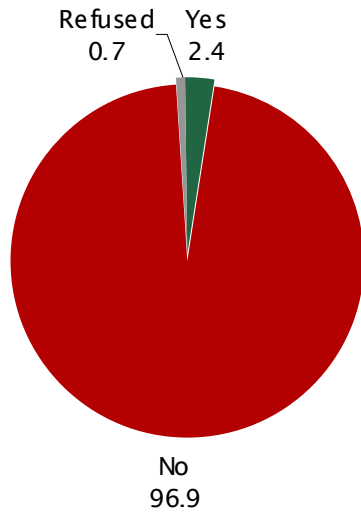
FIGURE 48 NUMBER OF EMPLOYEES WHO WOULD START USING METROLINK WITH LOCAL SHUTTLE AVAILABILITY



TRANSIT INCENTIVES The final questions in this series asked all Lake Forest businesses whether they currently provide incentives to employees to use public transit (Question 20), and for businesses with employees who currently use (or would likely use) the Metrolink with shuttle service if their business would be willing to help pay the costs of operating a local shuttle between their business site and the nearest Metrolink station (Question 21).

Question 20: Business Survey *Does your business currently provide incentives for employees to use public transit?*

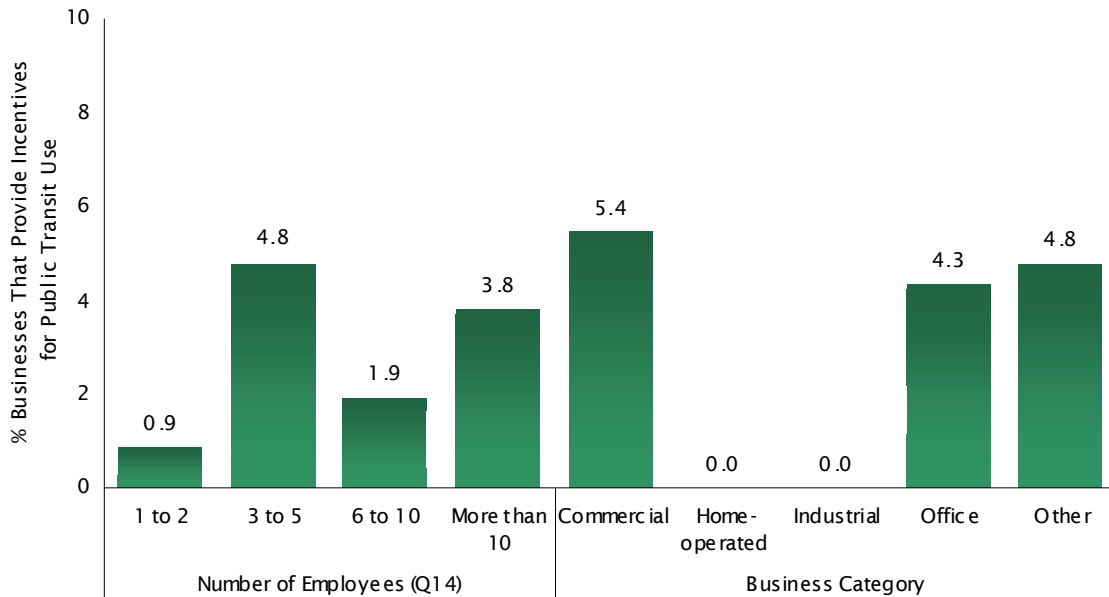
FIGURE 49 BUSINESS PROVIDES INCENTIVES FOR PUBLIC TRANSIT USE



Overall, few Lake Forest businesses (2%) currently provide incentives for employees to use public transit (Figure 49), although the practice appears to be more common among businesses with at least three employees and those in the commercial and office categories (see Figure 50).

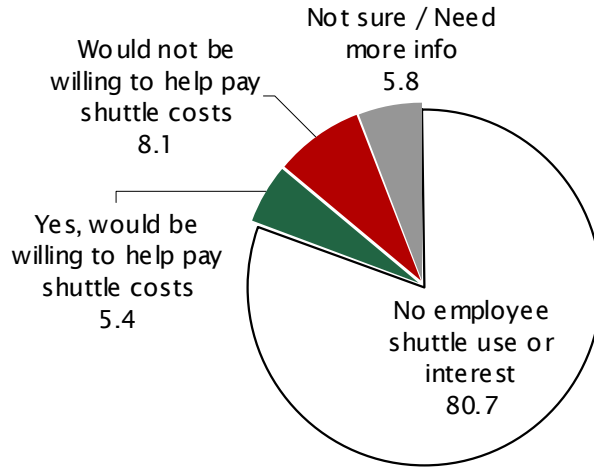
Approximately 5% of all Lake Forest businesses would, however, be willing to help pay for the costs of operating a local shuttle that would transport employees between their work site and the Metrolink station (see Figure 51).

FIGURE 50 BUSINESS PROVIDES INCENTIVES FOR PUBLIC TRANSIT USE BY NUMBER OF EMPLOYEES & BUSINESS CATEGORY



Question 21: Business Survey *Would your business be willing to help pay the costs of operating shuttles between your business site and the Metrolink station?*

FIGURE 51 BUSINESS WILLING TO HELP PAY SHUTTLE OPERATING COSTS



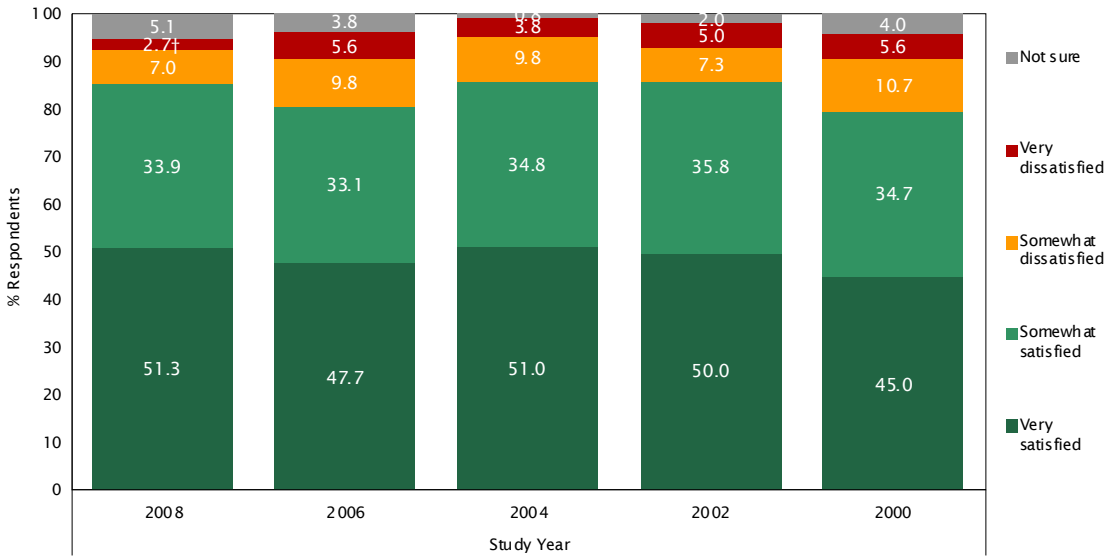
COMMUNICATION

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, 85% of residents indicated that they were either very (51%) or somewhat (34%) satisfied with the City’s communication efforts, which is similar to the ratings received in prior surveys although with significantly fewer residents reporting being very dissatisfied (Figure 52). Satisfaction with the City’s communication efforts was consistently high among residents regardless of subgroup categorization (see Figures 53 & 54).

Question 22: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, and other means?*

FIGURE 52 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY (2008 ~ 2000)



† Statistically significant change (p < 0.05) between the 2006 and 2008 studies.

FIGURE 53 SATISFACTION WITH COMMUNICATION: RESIDENT SATISFACTION BY YEARS IN LAKE FOREST AREA, AREA OF CITY & HOUSEHOLD INCOME

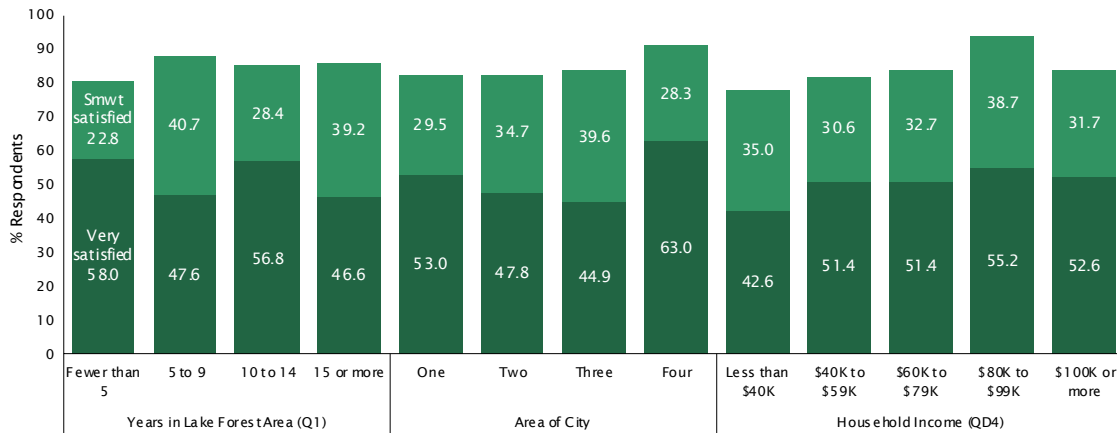
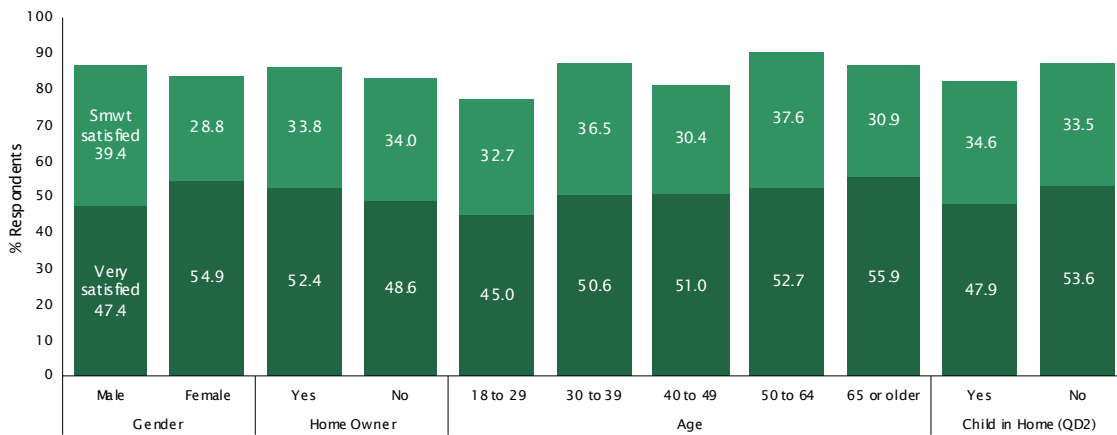


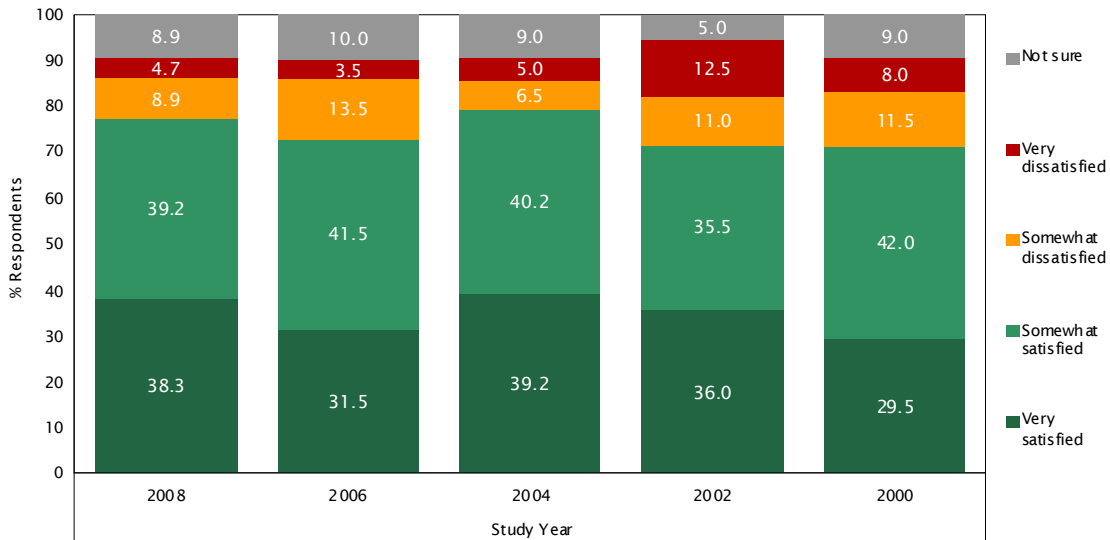
FIGURE 54 SATISFACTION WITH COMMUNICATION: RESIDENT SATISFACTION BY GENDER, HOME OWNER, AGE & CHILD IN HOME



Among local businesses, the levels of satisfaction with the City’s communication efforts were also similar to prior surveys, with 78% indicating that they were satisfied and 14% indicating that they were dissatisfied (Figure 55). Figure 56 shows how overall satisfaction varied among key business subgroups.

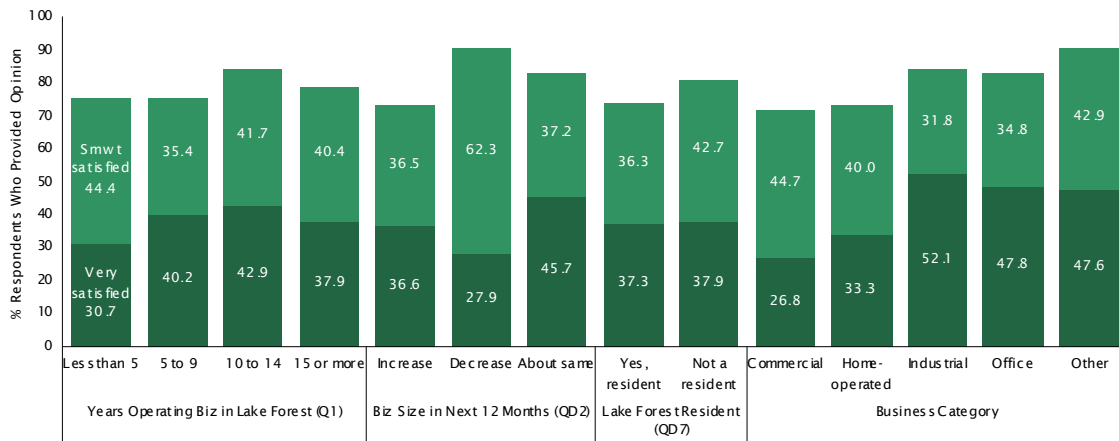
Question 22: Business Survey Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, and other means?

FIGURE 55 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY (2008 ~ 2000)



† Statistically significant change (p < 0.05) between the 2006 and 2008 studies.

FIGURE 56 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST, BIZ SIZE IN NEXT 12 MONTHS, LAKE FOREST RESIDENT & BUSINESS CATEGORY



TOPICS OF INTEREST Residents were next asked if there was a particular topic or issue that they'd like to receive more information about from the City. Approximately one-third (31%) of residents answered Question 23 in the affirmative (see Figure 57). When compared to their respective counterparts, interest in receiving additional information on specific topics was notably higher among those who were dissatisfied with the City's overall performance and communication efforts, those who had visited the City's websites, those who live in a neighborhood managed by an HOA, and residents under the age of 50 (see Figures 58 & 59).

Question 23: Resident Survey *Is there a particular topic or issue that you'd like to receive more information about from the City?*

FIGURE 57 DESIRE ADDITIONAL INFO FROM CITY

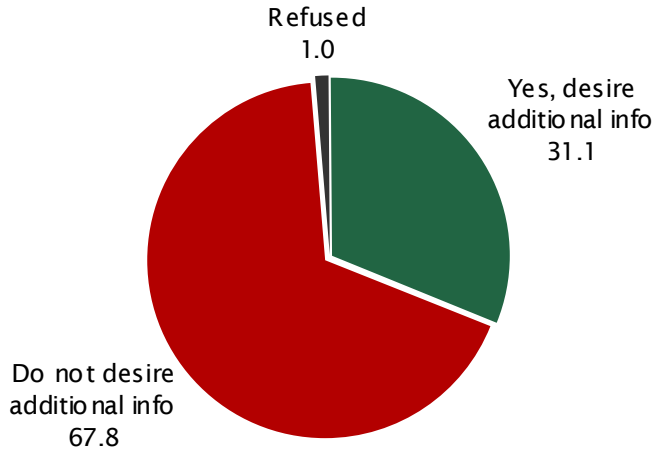


FIGURE 58 DESIRE ADDITIONAL INFO FROM CITY BY YEARS IN LAKE FOREST AREA, OVERALL SATISFACTION, SATISFACTION WITH COMMUNICATION & VISITED CITY WEBSITE

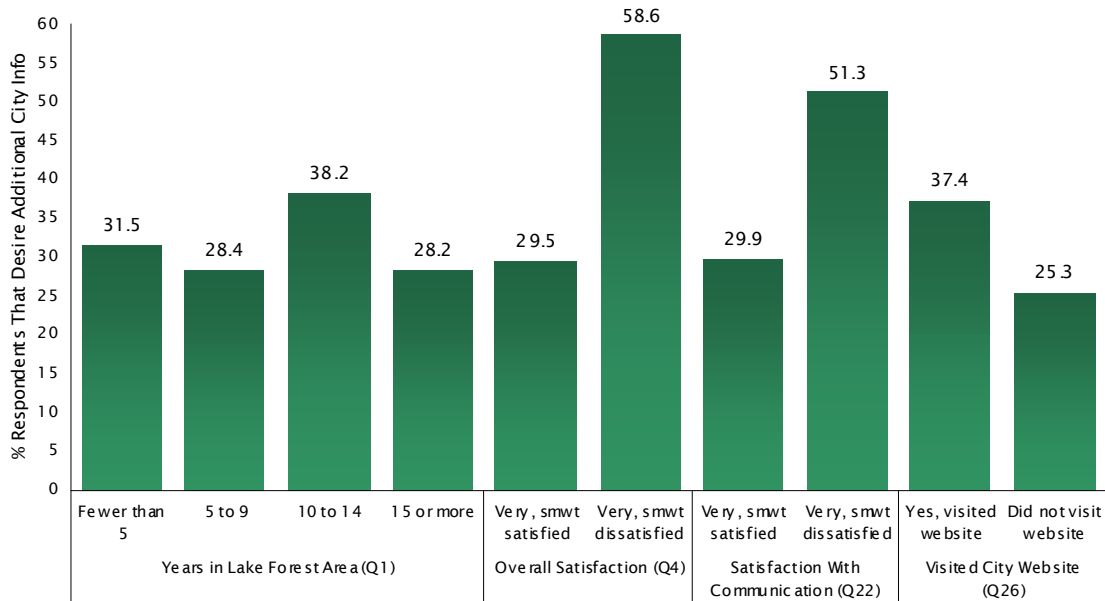
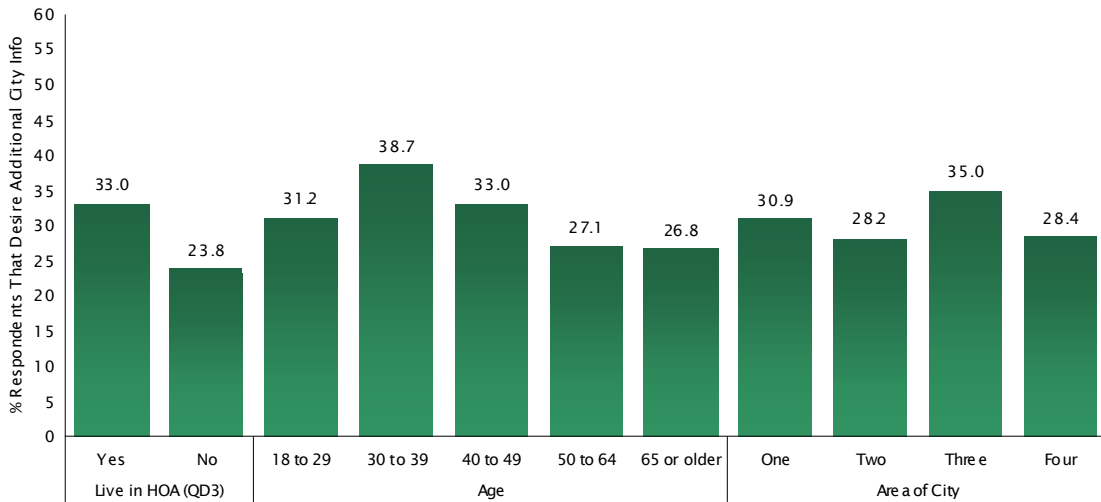


FIGURE 59 DESIRE ADDITIONAL INFO FROM CITY BY LIVE IN HOA, AGE & AREA OF CITY

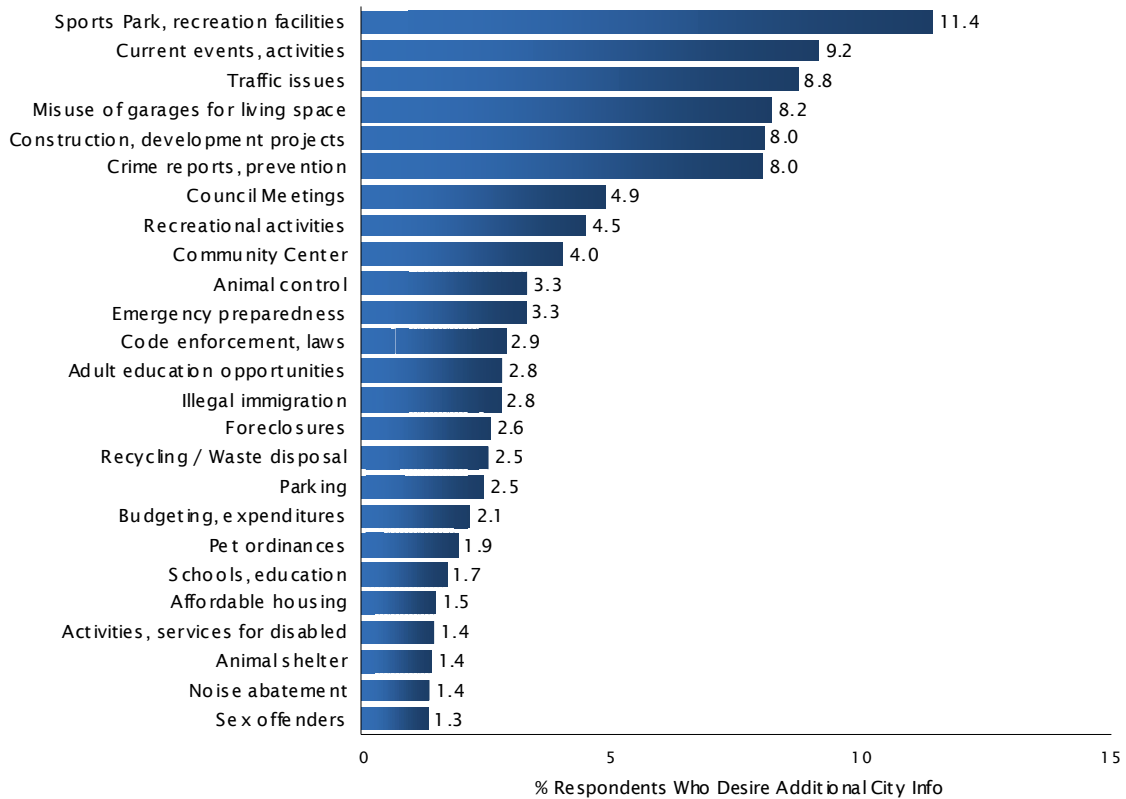


Residents who expressed interest in receiving additional information from the City were subsequently asked to briefly describe the topic in which they were interested. This question (Question 24) was posed in an open-ended manner, meaning that respondents were at liberty to mention any topic that came to mind without being prompted by—or restricted to—a particular list of topics. The verbatim responses were later reviewed by True North and grouped into the categories shown in Figure 60. Respondents were allowed to mention up to three issues, so the percentage results shown in the figure indicate the percentage of respondents who mentioned each topic.

Information about the proposed sports park and existing recreation facilities was the most commonly mentioned topic of interest in response to Question 24 (11%), followed by information about current events and activities (9%), traffic issues (9%), garage conversions (8%), construction/development projects in Lake Forest (8%), and crimes in the City (8%).

Question 24: Resident Survey Please briefly describe the topic (you'd like to receive information about from the City).

FIGURE 60 ADDITIONAL INFORMATION TOPICS DESIRED

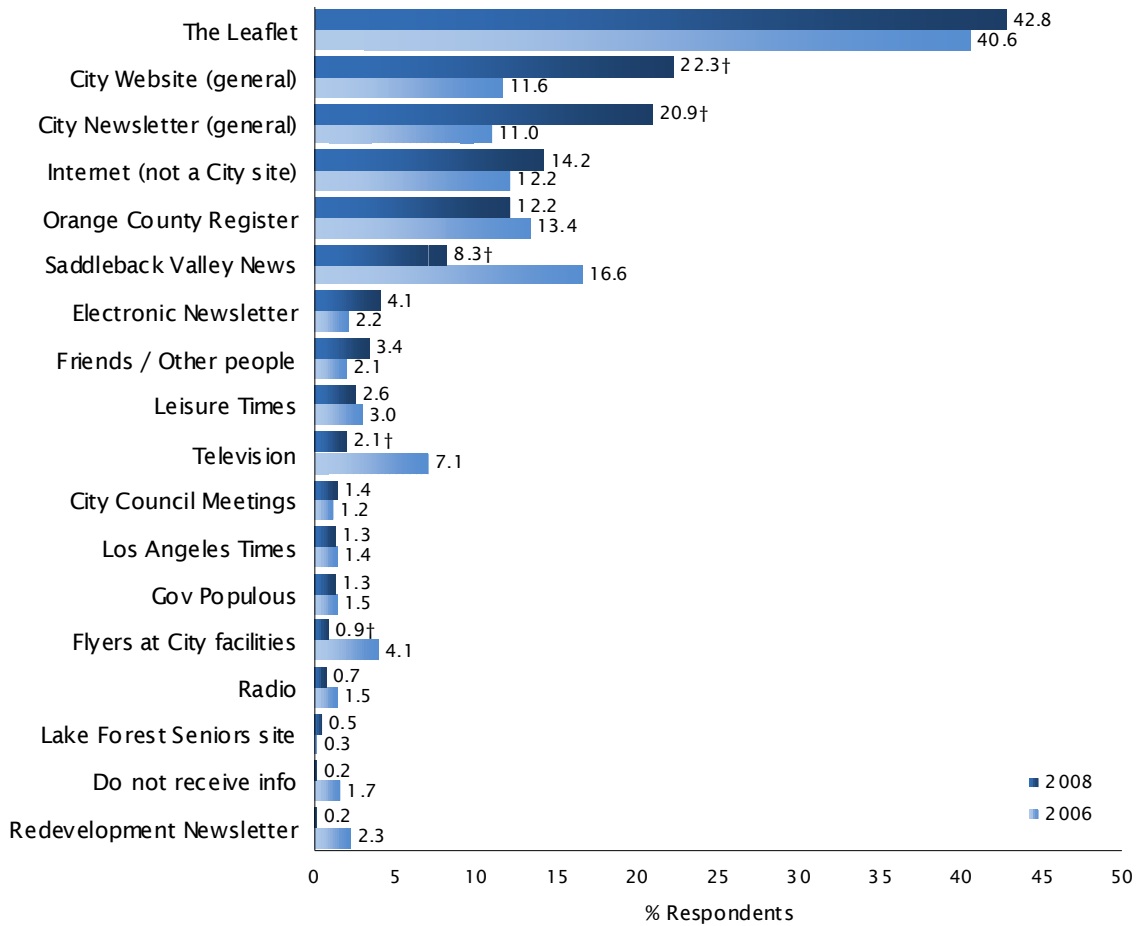


INFORMATION SOURCES Residents and businesses were next asked to indicate which information sources they use to find out about City of Lake Forest news, information, and programming. This question was asked in an open-ended format and respondents were allowed to report up to two sources of information. Thus, the percentages shown in the following figures reflect the percentage of residents and business professionals, respectively, who mentioned a given information source.

The most frequently cited source of information for City news among residents in 2008 was the City's newsletter, mentioned by name (*The Leaflet*) by 42% of respondents and referred to in general (the City's newsletter) by an additional 21% of residents (Figure 61). Other sources that were mentioned by at least 10% of residents included the City's website (22%), the Internet in general (14%), and the *Orange County Register* (12%). When compared to the 2006 survey results, use of the City's newsletter and websites increased significantly, whereas reliance on the *Saddleback Valley News*, television, and flyers at City Hall decreased significantly. Table 24 displays the most frequently-cited sources of city-related information according to respondent age, and demonstrates that younger residents are more likely to use new technologies for their information (website, Internet in general) while older residents are more likely to rely on traditional print and media sources.

Question 25: Resident Survey *What information sources do you use to find out about City of Lake Forest news, information and programming?*

FIGURE 61 INFORMATION SOURCES: RESIDENT SURVEY (2008 ~ 2006)



† Statistically significant change (p < 0.05) between the 2006 and 2008 studies.

TABLE 24 TOP INFORMATION SOURCES: RESIDENT SURVEY BY AGE

	Age				
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older
City Website (general)	The Leaflet	The Leaflet	The Leaflet	The Leaflet	The Leaflet
The Leaflet	City Website (general)	City Website (general)	City Newsletter (general)	City Newsletter (general)	City Newsletter (general)
Internet (not a City site)	City Newsletter (general)	City Newsletter (general)	Orange County Register	Orange County Register	Saddleback Valley News
Orange County Register	Internet (not a City site)	Internet (not a City site)	City Website (general)	City Website (general)	Orange County Register
City Newsletter (general)	Orange County Register	Saddleback Valley News	Internet (not a City site)	City Website (general)	City Website (general)

Members of the business community were most likely to mention the City’s website (23%) and newsletter—generally (23%) and by its name *The Leaflet* (22%)—when asked what information sources they rely on for Lake Forest news, information and programming (Figure 62). When compared to the 2006 study, the proportion of business professionals who mentioned that they rely on the City’s website and newsletter more than doubled, whereas use of the *Orange County Register* was significantly lower (see Table 25).

Question 23: Business Survey *What information sources does your business use to find out about City of Lake Forest news, information and programming?*

FIGURE 62 INFORMATION SOURCES: BUSINESS SURVEY

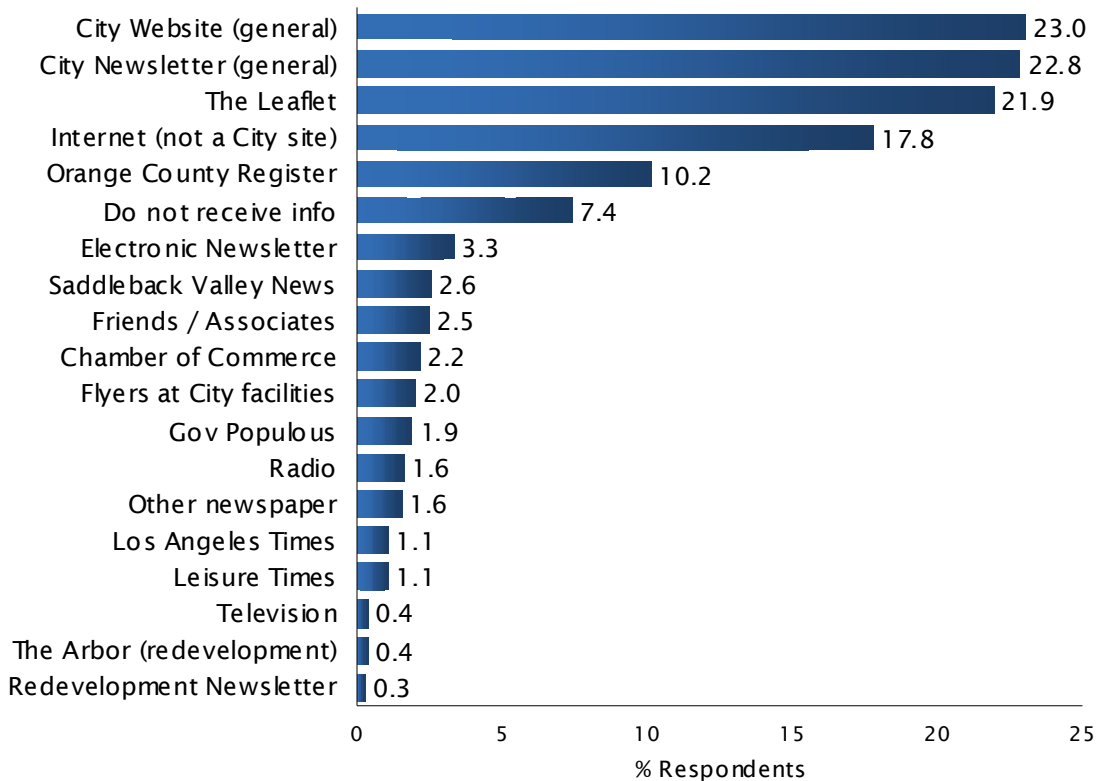


TABLE 25 INFORMATION SOURCES: BUSINESS SURVEY (2008 ~ 2004)

	Study Year		
	2008	2006	2004
City website (general)	23.0†	8.5	12.7
City newsletter (general)	22.8†	8.5	20.8
The Leaflet	21.9	16.0	16.7
Internet (not a City site)	17.8	13.5	15.0
Orange County Register	10.2†	19.5	11.6
Do not receive info	7.4	5.0	12.2
E-newsletter	3.3	2.5	7.7
Saddleback Valley News	2.6	7.5	6.6
Friends / Associates	2.5	3.5	3.1
Flyers at City facilities	2.0	8.5	3.6
Los Angeles Times	1.1	4.0	2.7

CITY WEBSITES The City of Lake Forest has been a leader among municipalities in developing websites tailored to different subgroups 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.

Figure 63 shows that, among residents, the proportion who had visited the City’s website has grown substantially over time. Whereas just 18% of residents reported visiting the City’s websites in 2000, that figure has grown steadily to 49% in 2008. For the interested reader, Figures 64 and 65 show how use of the City’s websites in the past year varied by key resident subgroups.

Question 26: Resident Survey *In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?*

FIGURE 63 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY (2008 ~ 2000)

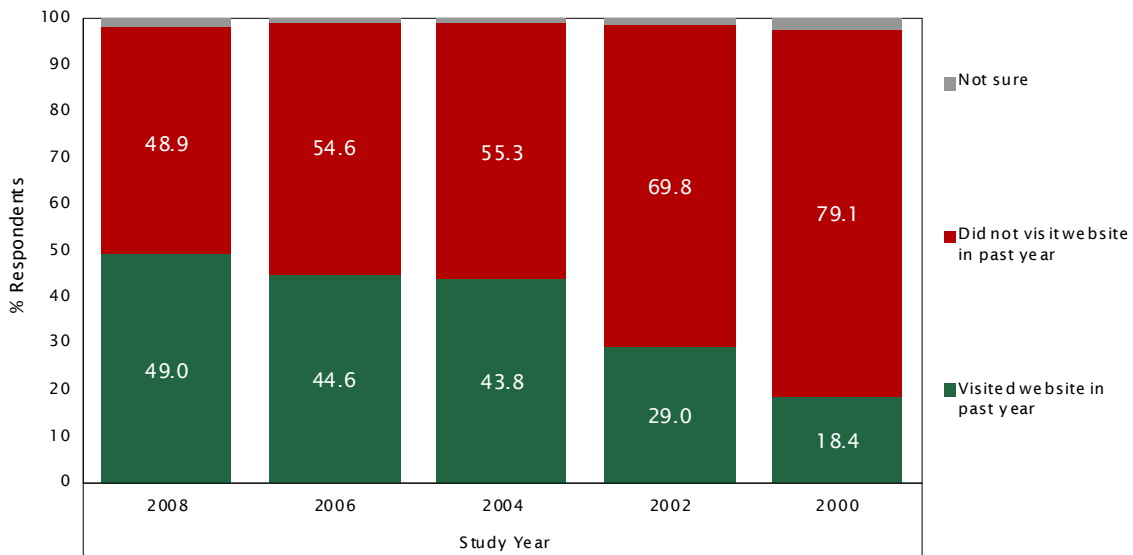


FIGURE 64 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, EMPLOYMENT STATUS & CHILD IN HOME

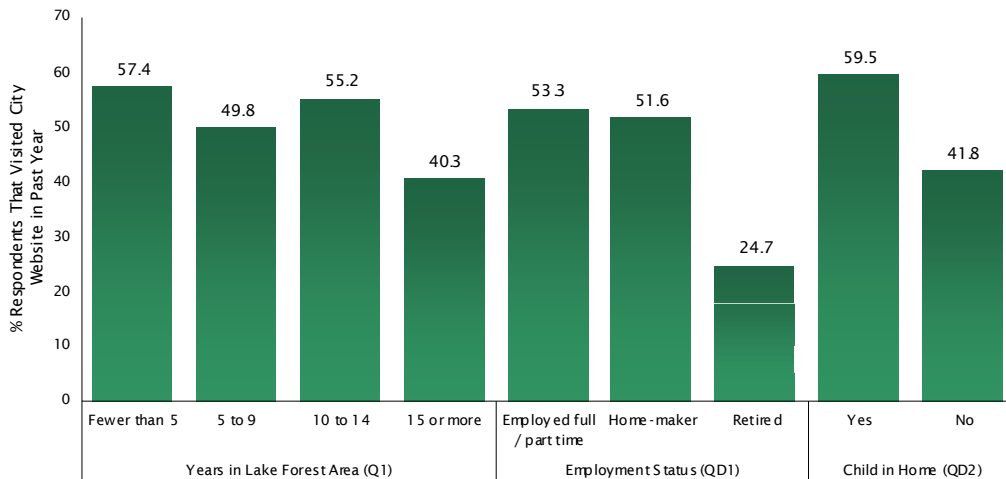
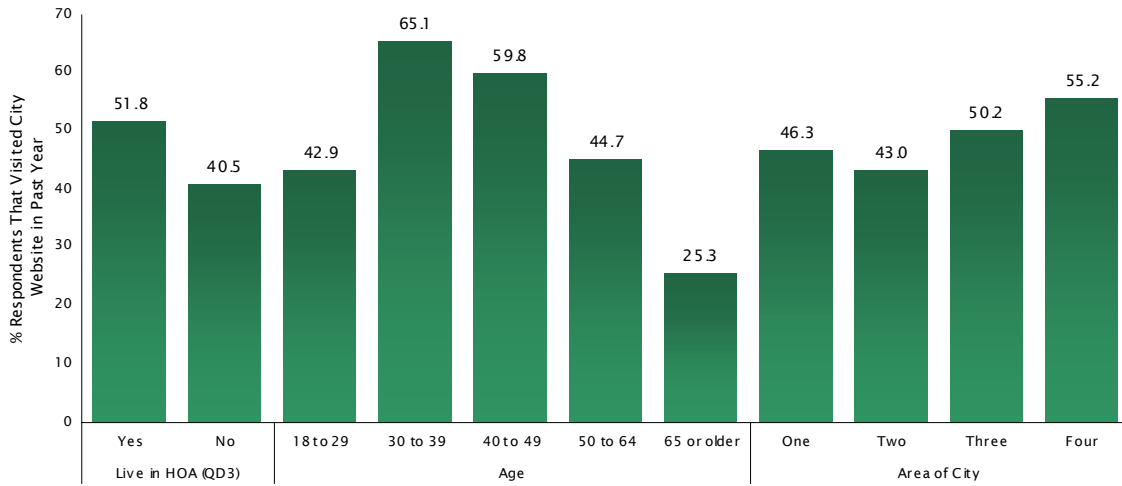


FIGURE 65 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY LIVE IN HOA, AGE & AREA OF CITY



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 66)—and it, too, has grown steadily over the past eight years. Overall, half (50%) of businesses indicated that they had visited the City’s websites during this period in 2008. Figure 67 shows how use of the City’s websites varied among key business subgroups.

Question 24: Business Survey *In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?*

FIGURE 66 VISITED CITY WEBSITE IN PAST YEAR: BUSINESS SURVEY (2008 ~ 2000)

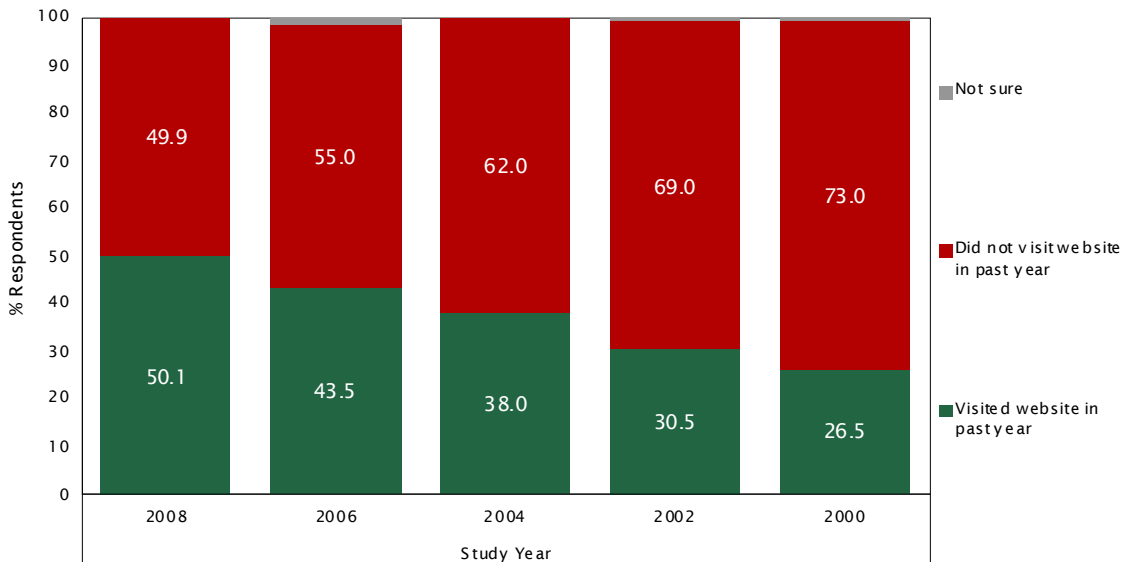
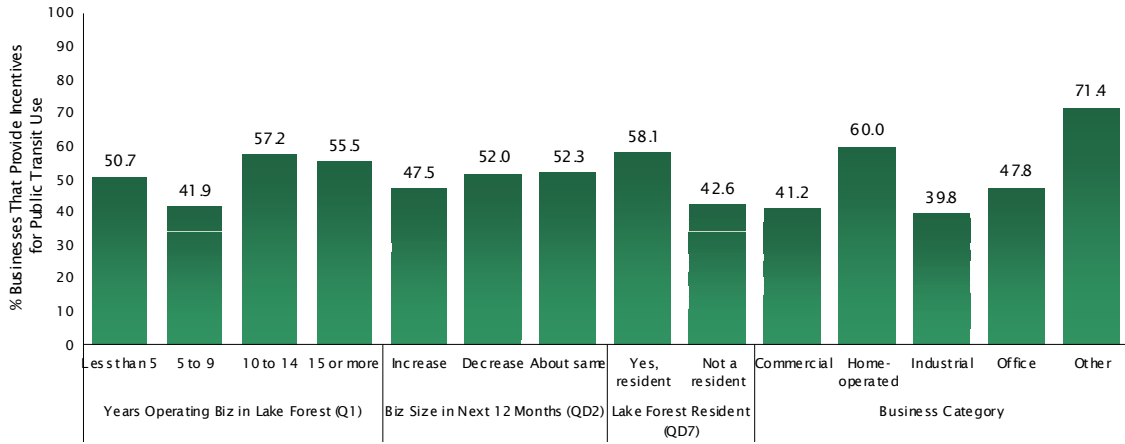


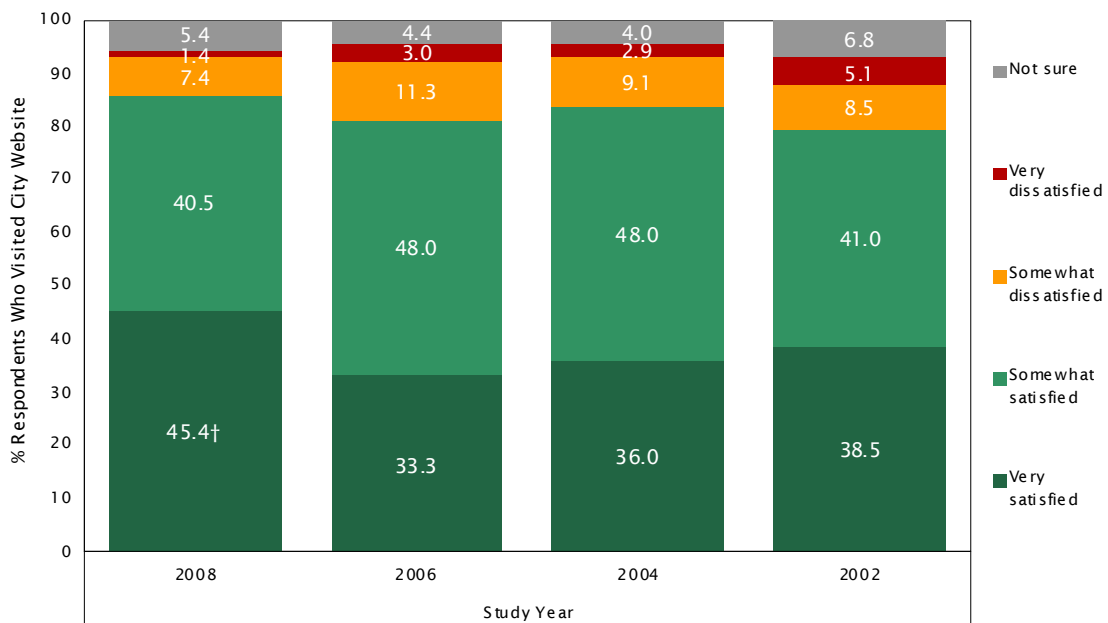
FIGURE 67 VISITED CITY WEBSITE IN PAST YEAR: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST, BIZ SIZE IN NEXT 12 MONTHS, LAKE FOREST RESIDENT & BUSINESS CATEGORY



WEBSITE CONTENT Visitors to the City’s websites were next asked to rate their level of satisfaction with the resources and content available on the sites—the results of which are shown in Figure 68 for residents and Figure 69 for local businesses.

Question 27: Resident Survey *Are you satisfied or dissatisfied with the resources and content available on the City's web sites?*

FIGURE 68 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY (2008 ~ 2002)

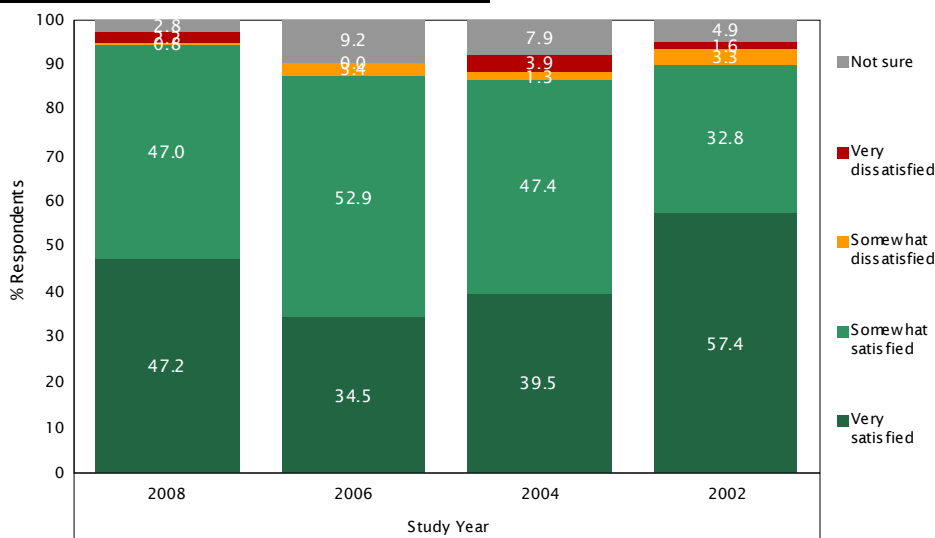


† Statistically significant change (p < 0.05) between the 2006 and 2008 studies.

Overall, visitors expressed high levels of satisfaction with the City’s websites, with 86% of residents and 94% of businesses indicating that they were satisfied with the resources available on the sites. When compared to the 2006 findings, residents’ opinions improved significantly (see Figure 68). Assessments of the resources and content on the City’s website also improved among the business community during this period, although the difference was not statistically significant. Another indication of residents’ satisfaction with the City’s websites was that few visitors could provide a specific suggestion for how to improve the sites (see Figure 70).

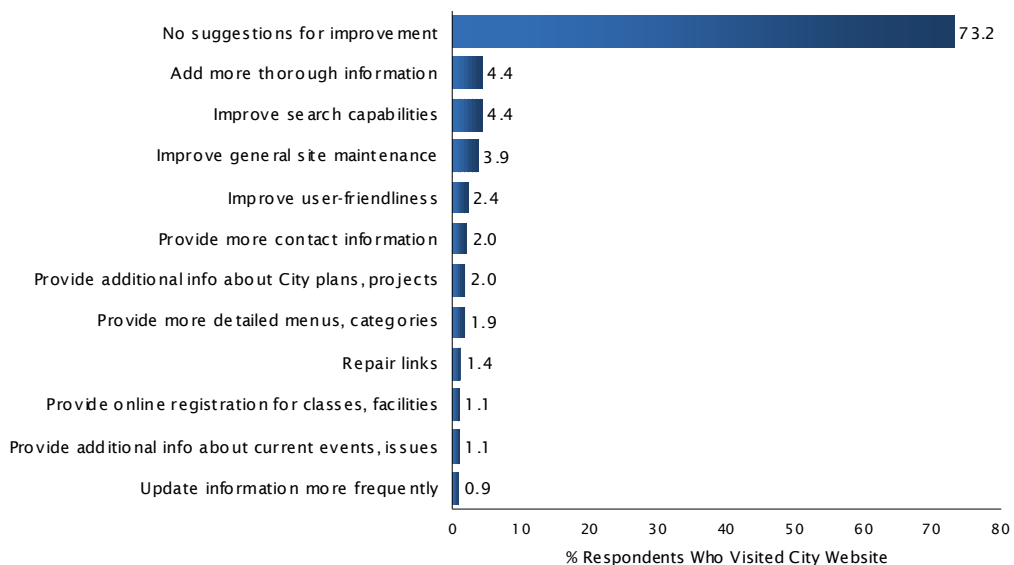
Question 25: Business Survey *Are you satisfied or dissatisfied with the resources and content available on the City's web sites?*

FIGURE 69 SATISFACTION WITH CITY WEBSITE: BUSINESS SURVEY (2008 ~ 2002)



Question 28: Resident Survey *Do you have any suggestions for ways that the City could improve their websites?*

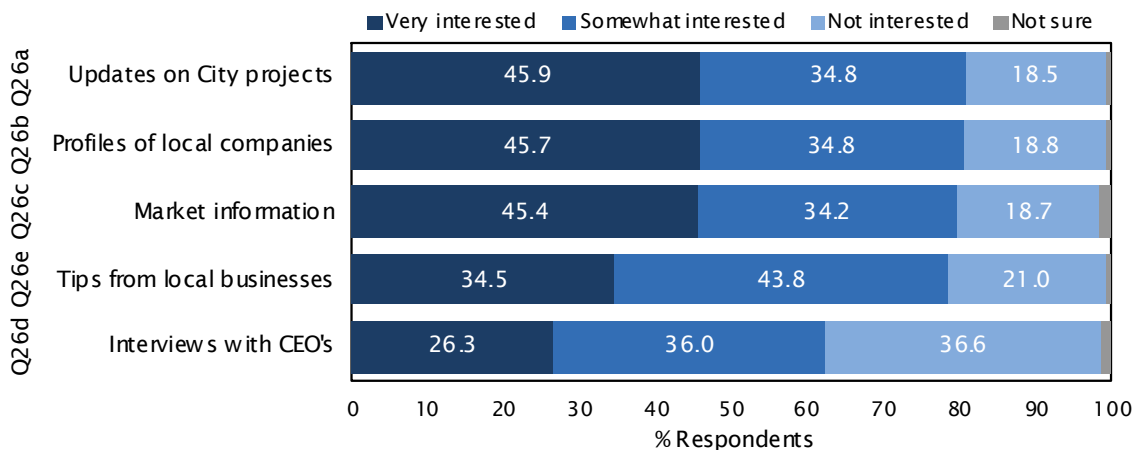
FIGURE 70 SUGGESTIONS FOR IMPROVING CITY WEBSITES



BUSINESS NEWSLETTER In addition to publishing its current newsletter *The Leaflet*, the City of Lake Forest is considering introducing a newsletter that is tailored to the local business community. After informing respondents of this fact, participants in the business survey were presented with each of the topics shown on the left of Figure 71 and simply asked whether they would be very interested, somewhat interested, or not interested in this topic. Overall, interest was greatest for updates on City projects (81% very or somewhat interested), followed closely by profiles on local companies (81%), market-related information (80%), and tips from local businesses (78%). When compared to the other topics tested, interest was somewhat lower for interviews with local CEOs (62%).

Question 26: Business Survey *The City of Lake Forest is considering publishing a newsletter on business topics and news in the City. As I read each of the following topics, please indicate whether you are very interested, somewhat interested, or not interested in this topic.*

FIGURE 71 INTEREST IN BUSINESS NEWSLETTER TOPICS

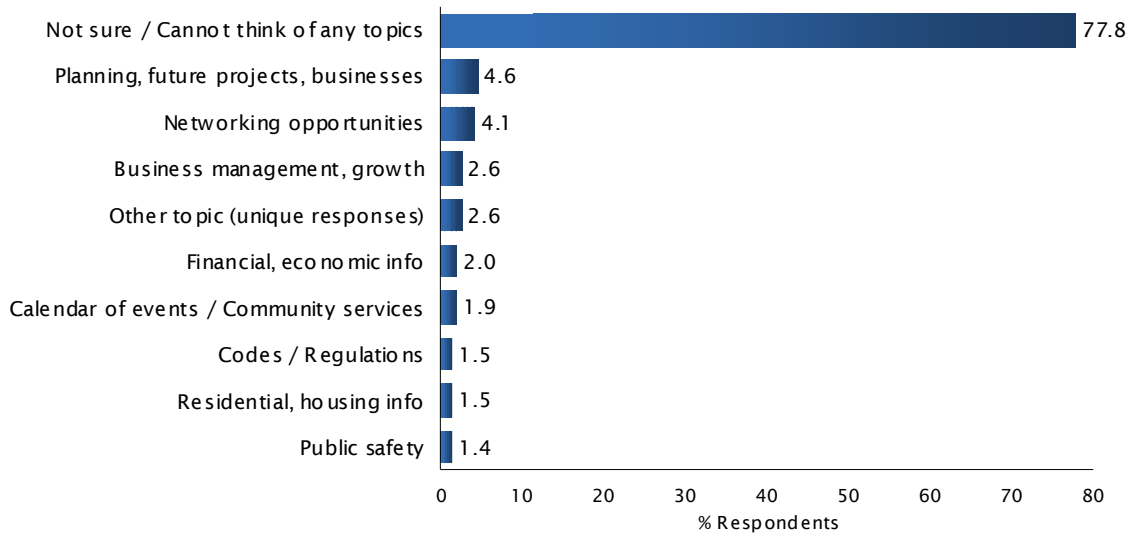


Recognizing that the list of topics provided in Question 26 is not an exhaustive list, respondents were also provided an opportunity to suggest additional topics of interest for the proposed newsletter. Question 26 was asked in an open-ended manner, thereby allowing respondents to mention any topic that came to mind without being prompted by—or restricted to—a particular list of options. The verbatim responses were later reviewed by True North and grouped into the categories shown in Figure 72.

The vast majority (78%) of participants in the business survey did not suggest an additional topic for the newsletter. Among the topics that were suggested, articles about future projects and plans in the City that will impact local businesses was the most common (5%), followed by networking opportunities (4%), business management/growth (3%), and financial/economic information (2%). No other specific topic was mentioned by at least 2% of respondents in the business survey.

Question 27: Business Survey *Is there a particular business topic that I didn't mention that you'd like to be addressed in the City's newsletter?*

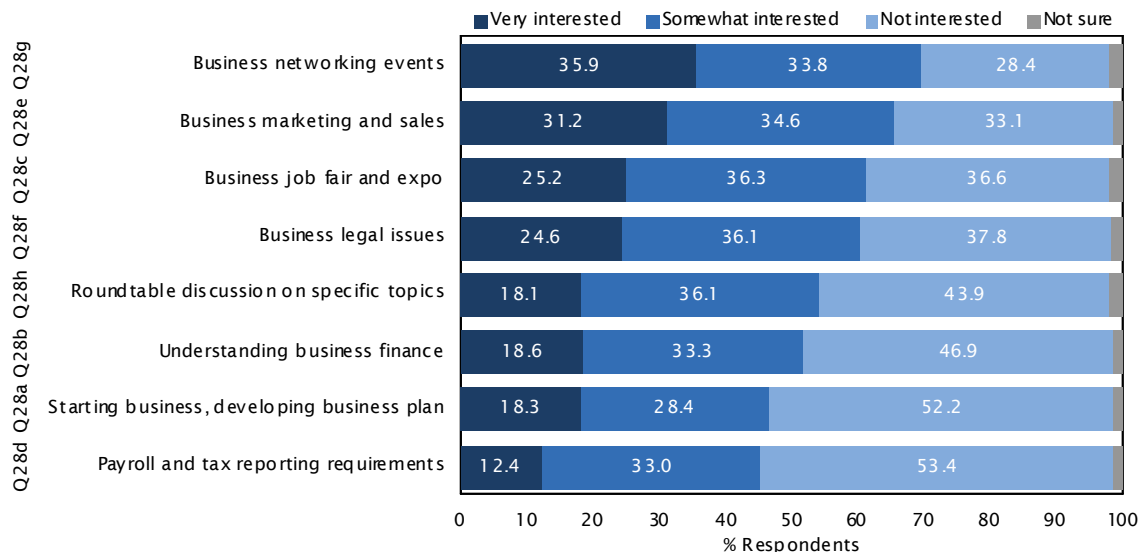
FIGURE 72 ADDITIONAL TOPICS FOR BUSINESS NEWSLETTER



BUSINESS WORKSHOPS In a manner similar to that described above for the proposed newsletter, participants in the business survey were also asked about their interest in attending a variety of seminars that the City is considering hosting for local businesses. The seminar topics—and respondents' stated interest in each—are shown in Figure 73.

Question 28: Business Survey *The City of Lake Forest is also considering hosting a variety of workshops for local businesses. As I read each of the following types of seminars, please indicate whether you would be very interested, somewhat interested, or not interested in attending the seminar.*

FIGURE 73 INTEREST IN BUSINESS WORKSHOP TOPICS



Overall, Lake Forest businesses expressed the greatest interest in attending business networking events (70% very or somewhat interested), followed by seminars on business marketing and sales (66%), and a business job fair and expo (62%). Other seminars that were popular with at least 50% of those surveyed included those on business legal issues (61%), roundtable discussions on specific topics (54%), and business finance (52%). Table 26 shows how the percentage of respondents who expressed being very interested in each seminar topic varied by category of business.

TABLE 26 INTEREST IN BUSINESS WORKSHOP TOPICS (SHOWING % VERY INTERESTED) BY BUSINESS CATEGORY

	Business Category				
	Commercial	Home-operated	Industrial	Office	Other
Business networking events	33.9	50.0	15.7	34.8	38.1
Business marketing and sales	48.0	30.0	9.0	34.8	28.6
Business job fair and expo	36.8	26.7	11.5	21.7	19.0
Business legal issues	36.7	23.3	13.0	26.1	14.3
Roundtable discussion on specific topics	25.6	16.7	3.2	26.1	23.8
Understanding business finance	22.7	23.3	5.8	17.4	19.0
Starting business, developing business plan	29.4	20.0	4.2	17.4	9.5
Payroll and tax reporting requirements	22.3	10.0	5.3	13.0	4.8

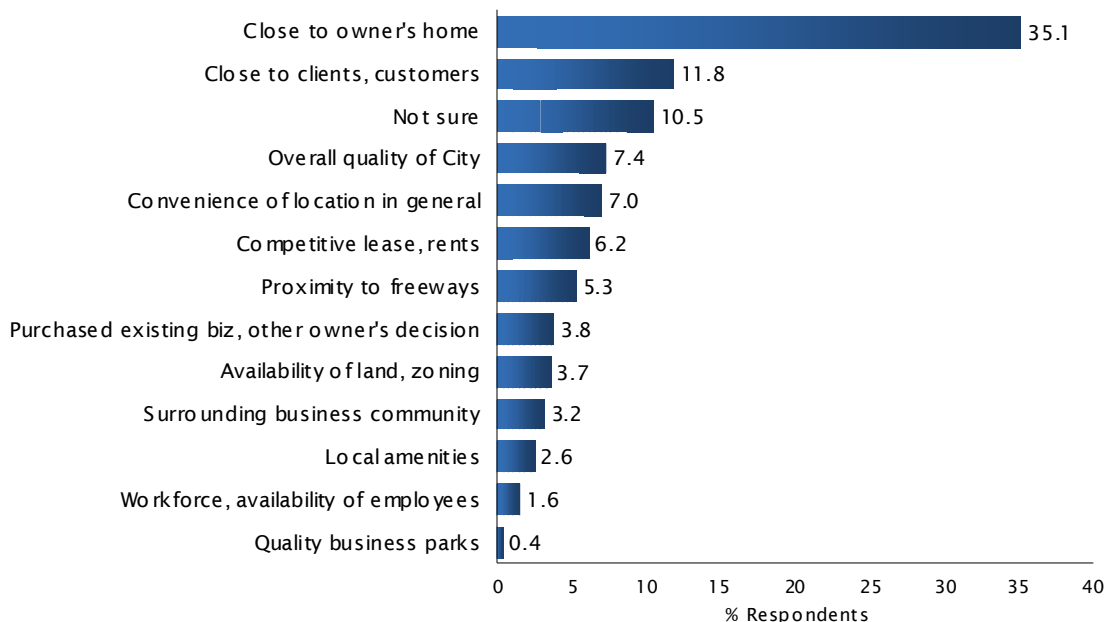
BUSINESS BACKGROUND INFO

At the conclusion of the business survey, respondents were asked several questions about their businesses—including their reasons for locating in Lake Forest, as well as expectations regarding future growth, space requirements, and possible relocation.

REASONS FOR LOCATING IN LAKE FOREST When asked to identify the most important factor for why they chose to locate their business in the City of Lake Forest, more than one-third (35%) indicated that it is close to the owner's home. Other reasons cited by at least 5% of respondents included that Lake Forest is close to clients/customers (12%), is a high-quality city (7%), is in a convenient location (7%), has competitive lease rates (6%), and is close to freeways (5%).

Question D1: Business Survey *What would you say is the most important factor for why you chose to locate your business in the City of Lake Forest?*

FIGURE 74 PRIMARY REASON FOR LOCATING BUSINESS IN LAKE FOREST



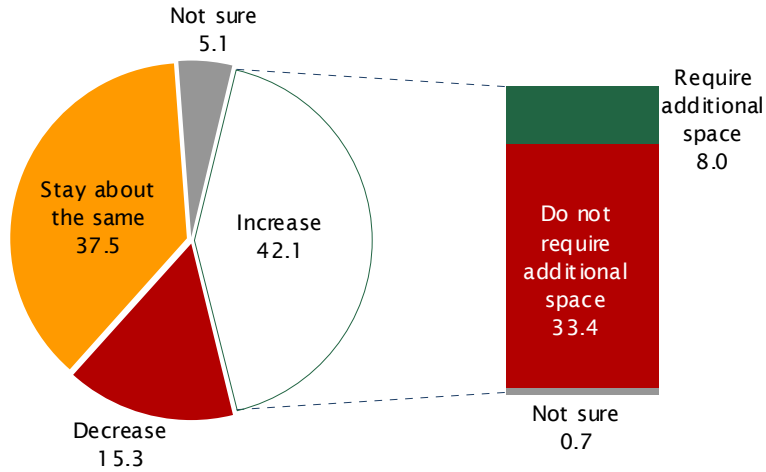
GROWTH The next question in this series asked local businesses whether—in the upcoming 12 months—they anticipated that their business will increase, decrease, or stay about the same. The results to this question for 2008 are shown in Figure 75 on the next page. As in prior years, local businesses were generally optimistic about their future growth, with 42% anticipating growth and 38% expecting that their business would remain about the same. Just 15% indicated that they expect their business to decrease in the coming year.

Among the 42% of businesses that anticipated growth, 8% indicated that they would require additional space whereas the remaining 34% were either unsure or did not anticipate needing additional space.

Question D2: Business Survey *In the next 12 months, do you think your business will increase, decrease or stay about the same?*

Question D3: Business Survey *To accommodate the growth in your business, will you require additional square footage or a larger building?*

FIGURE 75 BUSINESS SIZE AND SQUARE FOOTAGE REQUIREMENTS IN NEXT 12 MONTHS

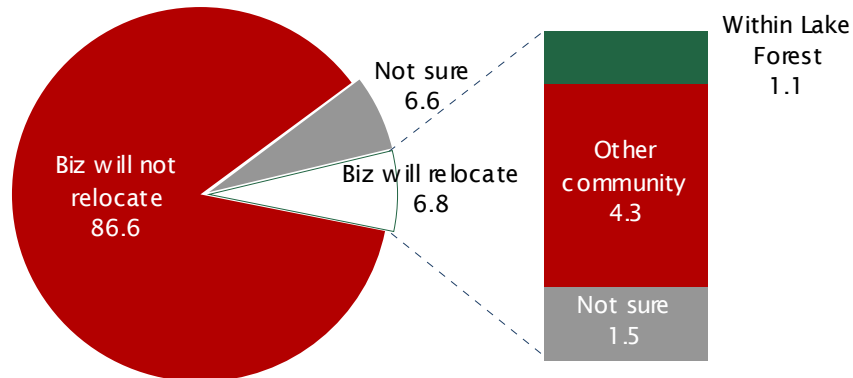


RELOCATION The final two substantive questions in the business survey asked respondents whether they anticipated relocating their business in the next year and—if yes—whether they were planning to relocate within Lake Forest or to another community. Figure 76 shows the proportion of businesses that anticipated relocating in 2008 was 7%, which is the lowest percentage recorded since 2000. Of the 7% of businesses that anticipated relocating in the next year, approximately half (4%) expected to relocate to another community, 1% within Lake Forest, and 1.5% were unsure.

Question D4: Business Survey *In the next 12 months, do you think your business will relocate?*

Question D5: Business Survey *Will you be relocating your business within Lake Forest or to another community?*

FIGURE 76 BUSINESS RELOCATION IN NEXT 12 MONTHS





RESIDENT DEMOGRAPHIC INFO

TABLE 27 SAMPLE DEMOGRAPHICS: RESIDENT SURVEY (2008 ~ 2002)

Study Year	2008	2006	2004	2002
Total Respondents	400	400	400	400
QD1 Employment status				
Employed full-time	54.6	58.5	N/A	N/A
Employed part-time	13.7	11.0	N/A	N/A
Student	2.6	3.7	N/A	N/A
Homemaker	8.4	7.9	N/A	N/A
Retired	13.6	16.0	N/A	N/A
In-between jobs	6.0	1.9	N/A	N/A
Refused	0.9	1.1	N/A	N/A
QD2 Child in home				
Yes	41.3	43.4	44.5	44.8
No	58.5	56.4	55.0	54.3
Refused	0.2	0.2	0.5	1.0
QD3 Live in HOA				
Yes	74.8	73.3	72.8	73.3
No	24.4	25.6	26.0	25.3
Refused	0.8	1.1	1.3	1.5
QD6 Household income				
Under \$40K	8.1	7.0	9.5	11.5
\$40K to \$59K	10.1	10.3	14.8	15.3
\$60K to \$79K	13.9	16.8	21.0	12.8
\$80K to \$99K	15.9	10.7	13.3	17.0
\$100K or more	36.6	42.4	31.3	29.3
Not sure / Refused	15.4	12.9	10.3	14.3
QD7 Gender				
Male	47.7	47.5	49.8	49.3
Female	52.3	52.5	50.3	50.8
S1 Party				
Democrat	26.9	25.5	28.3	26.5
Republican	50.2	52.5	50.3	54.8
Other	4.4	5.1	4.3	4.8
DTS	18.5	17.0	17.3	14.0
S2 Age				
18 to 29	13.4	13.4	14.5	14.8
30 to 39	17.2	16.9	20.8	22.8
40 to 49	25.9	26.9	28.8	26.5
50 to 64	28.6	29.9	23.8	23.5
65 and older	14.9	13.0	12.3	12.3
S6 Home Ownership status				
Own	72.0	75.3	66.5	N/A
Rent	28.0	24.7	33.5	N/A

Table 27 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 28 on the next page 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 28 SAMPLE DEMOGRAPHICS: BUSINESS SURVEY (2008 ~ 2002)

Study Year	2008	2006	2004	2002	2000
<i>Total Respondents</i>	200	200	200	200	200
QD7 Resident of Lake Forest					
Yes	34.5	30.5	23.5	42.5	N/A
No	63.5	68.5	76.5	55	N/A
Refused	2.0	1.0	0.0	2.5	N/A
QS1 Gender					
Male	58.0	58.0	57.0	68.0	71.0
Female	42.0	42.0	43.0	32.0	29.0
QS2 Business category					
C-FR	8.5	6.0	4.5	4.5	N/A
C-Southwest	8.5	8.5	8.0	8.0	N/A
C-Midcity	8.0	8.0	8.5	10.0	N/A
C-RDA	10.5	11.0	11.5	12.5	N/A
Homeoccs	15.0	12.5	12.5	13.0	N/A
I-AspanLambert	9.0	8.0	10.5	12.0	N/A
I-Midcity	12.5	13.0	18.0	20.5	N/A
I-FRPH	3.5	4.0	4.5	4.0	N/A
I-RDA	2.5	2.0	2.5	2.5	N/A
Office	11.5	17.5	17.5	11.0	N/A
Other	10.5	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 80) 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 2008 survey were tracked directly from past 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 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 2,475 companies that appear in the City's business database with viable contact information. Because of the large percentage of home-based businesses in the City, the sample was not drawn in a strictly proportional manner. A total of 30 interviews were collected among home-based businesses, with the remaining 170 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 redevelopment project area (RDA).
- 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 redevelopment project area (RDA).
- 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.³ 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 44,527 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 10 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:

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

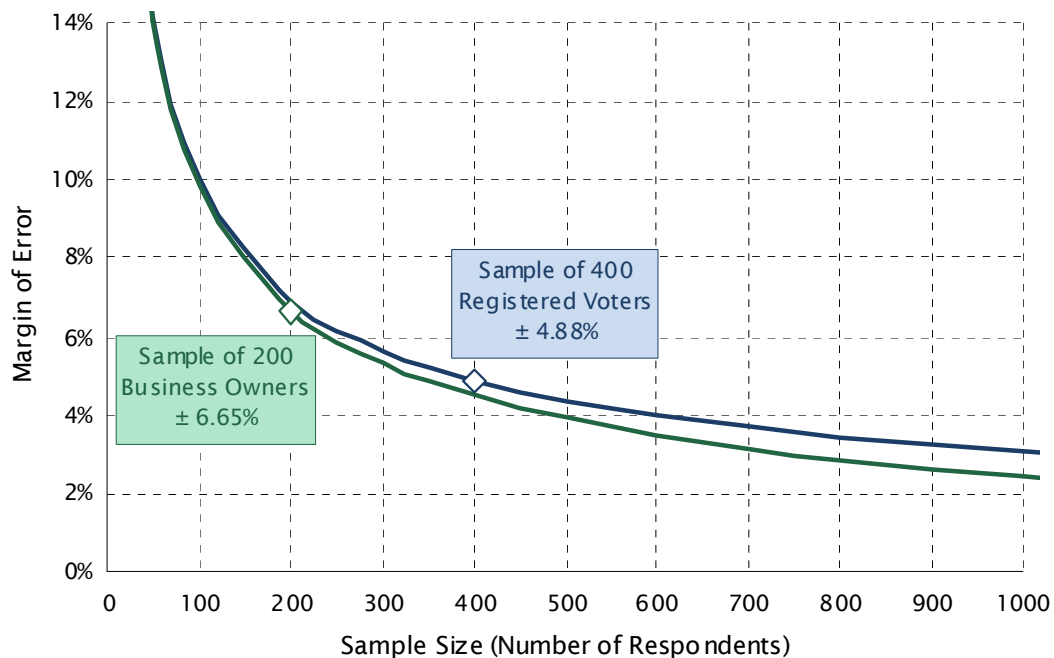
3. As noted previously, the business sample was based on a universe of businesses that was not as heavily weighted toward home-based businesses as is the actual universe.

where \hat{p} is the proportion of voters who have interacted with the Department in the past year (0.08 for 8% in this example), N is the population size of all registered voters (44,527), 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 $\pm 2.65\%$. This means that, with 8% 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 5% and 11%.

Figure 77 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 $\pm 4.88\%$, whereas the maximum margin of error for questions answered by all 200 business owners is $\pm 6.65\%$.

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 77 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 77 MAXIMUM MARGIN OF ERROR



DATA COLLECTION Consistent with the prior studies, the primary mode of data collection was telephone interviewing. To maximize response rates and the convenience of participating in the study, the 2008 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 November 11 and November 19, 2008. 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 24 and December 4, 2008, although interviewing was suspended over the Thanksgiving holiday. 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 2006 and 2008 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
Voter Survey
Preliminary Toplines
November 2008

Section 1: Introduction to Study

Hello, may I please speak to _____? My name is _____ and I'm calling on behalf of TNR, an independent 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	20%
	2	5 years to less than 10 years	21%
	3	10 years to less than 15 years	22%
	4	15 or more years	37%
	99	Refused	0%
Q2	What do you feel is the most important issue facing residents of Lake Forest? Probe: Any others?		
	Cannot think of any issues		25%
	Traffic		17%
	Crime / Public safety		14%
	Local economy, businesses, jobs		11%
	Availability, cost of housing		9%
	Education		6%
	Parks / Recreation		5%
	Immigration / Day laborer issues		5%
	Overcrowding / Growth		3%
	Road maintenance		3%
	City planning / Development		2%
	Taxes / Fees		2%
	Gangs		2%

	Cost of living	2%
	Shopping / Entertainment options	1%
	Cleaning, maintaining public facilities	1%
	Transportation	1%
	Neighborhood issues	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	52%
	2 Good	41%
	3 Fair	4%
	4 Poor	2%
	5 Very Poor	1%
	98 Not sure	0%
	99 Refused	0%
Q4	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	61%
	2 Somewhat satisfied	31%
	3 Somewhat dissatisfied	5%
	4 Very dissatisfied	1%
	98 Not sure	2%
	99 Refused	0%
Q5	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 / Cannot think of anything	13%
	Reduced, improved traffic	12%
	Increased crime prevention, safety	10%
	Keep doing what they are doing	9%
	Increased, improved recreation	5%
	Increased job opportunities	4%
	Improved economic environment	4%
	Cleaner air / Better environmental effort	3%
	Road improvements	3%
	Effective cleanup and redevelopment	3%
	Better, more schools	3%
	Better government leadership	3%

More affordable housing	2%
Better community spirit / Family values	2%
Improved parks, recreation	2%
Maintained infrastructure	2%
Improved public transportation	2%
Improved animal services	2%
Completed construction on El Toro Road	1%
Limited growth	1%
Improved shopping, entertainment options	1%
Enforce parking violations	1%
Enforced immigration laws	1%
Lower taxes, fees	1%
Complete unfinished projects	1%

Section 3: Police Department

Q6 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?

<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Providing neighborhood watch programs	17%	42%	34%	6%	1%	0%
B	Investigating criminal activity	43%	47%	8%	1%	1%	0%
C	Providing child safety programs	24%	45%	23%	6%	2%	0%
D	Enforcing traffic laws	18%	40%	33%	8%	1%	0%
E	Maintaining a low crime rate	49%	46%	5%	1%	0%	0%
F	Preparing for emergencies	36%	45%	18%	1%	0%	0%
G	Providing crossing guards near schools	20%	46%	25%	7%	2%	0%
H	Providing animal control services	14%	32%	39%	14%	1%	0%

Q7		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.					
Q7		Are you satisfied or dissatisfied with the City's efforts to: _____, 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>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Provide neighborhood watch programs	33%	36%	9%	2%	20%	0%
B	Investigate criminal activity	47%	28%	4%	3%	17%	0%
C	Provide child safety programs	33%	30%	2%	2%	33%	0%
D	Enforce traffic laws	49%	37%	6%	5%	2%	0%
E	Maintain a low crime rate	60%	30%	5%	2%	3%	0%
F	Prepare for emergencies	34%	36%	5%	2%	24%	0%
G	Provide crossing guards near schools	60%	24%	1%	2%	14%	0%
H	Provide animal control services	36%	33%	6%	7%	18%	0%

<i>Section 4: Development Services</i>							
Q8		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.					
Q8		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	No Opinion	Refused
A	Issuing building permits	10%	37%	38%	10%	4%	0%
B	Inspecting buildings	14%	47%	29%	6%	4%	0%
C	Enforcing zoning regulations	12%	36%	39%	10%	4%	0%
D	Enforcing sign regulations	6%	34%	40%	16%	4%	0%

Q9		Are you satisfied or dissatisfied with the City's efforts to: _____, 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>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Issue building permits	24%	28%	4%	2%	42%	0%
B	Inspect buildings	23%	30%	4%	1%	43%	0%
C	Enforce zoning regulations	25%	31%	6%	3%	35%	0%
D	Enforce sign regulations	28%	34%	5%	2%	31%	0%
Q10		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?					
	1	Yes		8%			
	2	No		92%			
	98	Not sure		0%			
	99	Refused		0%			

<i>Section 5: Public Works Department</i>							
Q11		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?					
<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Street sweeping	13%	42%	40%	5%	0%	0%
B	Maintaining trees	18%	50%	29%	3%	1%	0%
C	Preventing storm-water pollution	26%	55%	15%	4%	1%	0%
D	Reducing traffic congestion	30%	53%	16%	1%	0%	0%
E	Maintaining local streets and roads	28%	64%	7%	1%	0%	0%
F	Providing bike paths and pedestrian facilities	15%	47%	33%	4%	1%	0%
G	Maintaining parks and picnic areas	24%	56%	19%	2%	0%	0%
H	Maintaining public landscapes	16%	52%	28%	3%	0%	0%
I	Providing garbage and recycling services	29%	58%	10%	2%	1%	0%

Q12		Are you satisfied or dissatisfied with the City's efforts to: _____, 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>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Provide street sweeping services	57%	32%	3%	2%	5%	0%
B	Maintain trees	58%	33%	4%	2%	4%	0%
C	Prevent storm-water pollution	32%	37%	3%	2%	25%	0%
D	Reduce traffic congestion	24%	48%	17%	9%	2%	0%
E	Maintain local streets and roads	50%	40%	7%	2%	1%	0%
F	Provide bike paths and pedestrian facilities	54%	32%	5%	2%	6%	0%
G	Maintain parks and picnic areas	61%	29%	6%	0%	4%	0%
H	Maintain public landscapes	61%	32%	3%	2%	2%	0%
I	Provide garbage and recycling services	63%	24%	6%	2%	4%	0%

<i>Section 6: Community Services Department</i>							
Q13		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?					
<i>Read in Order</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Providing after school recreation programs	19%	38%	25%	13%	5%	0%
B	Providing recreation programs for pre-school children	11%	34%	33%	18%	5%	0%
C	Providing recreation and sports programs for elementary school-aged children	18%	40%	29%	9%	4%	0%
D	Providing recreation and sports programs for teens	20%	47%	20%	8%	4%	0%
E	Providing adult recreation programs such as classes, concerts and trips	8%	28%	45%	16%	2%	0%
F	Providing adult sports programs	5%	19%	51%	21%	3%	0%
G	Providing recreation programs for seniors	12%	39%	38%	8%	2%	0%
H	Providing recreation programs for families	11%	35%	39%	13%	2%	0%
I	Providing special events like concerts in the park and the Fourth of July Parade	16%	37%	36%	8%	2%	0%

Q14		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? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Provide after school recreation programs	37%	26%	5%	2%	29%	1%
B	Provide recreation programs for pre-school children	29%	28%	4%	2%	35%	1%
C	Provide recreation and sports programs for elementary school-aged children	34%	28%	6%	2%	29%	1%
D	Provide recreation and sports programs for teens	29%	32%	7%	2%	30%	1%
E	Provide adult recreation programs such as classes, concerts and trips	35%	37%	4%	3%	21%	1%
F	Provide adult sports programs	25%	30%	9%	2%	33%	1%
G	Provide recreation programs for seniors	37%	28%	4%	1%	29%	0%
H	Provide recreation programs for families	33%	33%	5%	2%	26%	1%
I	Provide special events like concerts in the park and the Fourth of July Parade	58%	28%	3%	0%	11%	0%

Section 7: Sports Park & Community Center							
Q15		The City of Lake Forest is in the process of planning a major sports park. As I read each of the following amenities, I'd like you to indicate whether you think the amenity should be a high, medium or low priority for inclusion in the park, or if you think it should not be a part of the new sports park. Please keep in mind that not all of the amenities can be high priorities. Here is the (first/next) one: _____. Should this amenity be a high, medium or low priority for the new sports park, or should the park not include this amenity?					
<i>Randomize</i>		High Priority	Medium Priority	Low Priority	Should not include in Park	No Opinion	Refused
A	Lighted sports fields, such as baseball and softball diamonds, soccer fields and football fields	66%	22%	9%	1%	2%	0%
B	Outdoor courts for sports like basketball, volleyball, tennis and roller hockey	58%	32%	7%	1%	2%	0%
C	Outdoor facilities for activities like horseshoes, shuffleboard, lawn bowling and Frisbee golf	17%	39%	38%	4%	1%	0%
D	Outdoor tracks and circuits for walking, running and exercising	59%	27%	10%	2%	1%	0%

E	Community swimming pool and aquatic facilities	41%	34%	18%	5%	1%	0%
F	Dog park	32%	28%	29%	10%	2%	0%
G	Teen Center	50%	32%	12%	4%	2%	0%
Q16	Are there any particular amenities that I did not mention that you think should be a high priority for inclusion in the Sports Park? <i>If yes, ask: Please describe the amenity.</i>						
	No other high priorities	71%					
	Playground for children	6%					
	Restrooms / Showers	4%					
	Skateboarding facilities	3%					
	Amphitheater / Outdoor entertainment	2%					
	Hiking trails	2%					
	Picnic areas	2%					
	Bike trails	2%					
	Trees / Shaded areas	2%					
	Football, soccer field	2%					
	Basketball courts	1%					
	Tennis courts	1%					
	Racquetball, handball courts	1%					
	Snack bars / Vending machines	1%					
	Community Center	1%					
	Adequate lighting	1%					
	Archery, shooting range	1%					
	Access for disabled visitors	1%					
	Not sure	1%					
Q17	The City of Lake Forest is also going to build a Community Center. As I read each of the following amenities, I'd like you to indicate whether you think the amenity should be a high, medium or low priority for inclusion in the Center, or if you think it should not be a part of the Community Center. Please keep in mind that not all of the amenities can be high priorities. Here is the (first/next) one: _____. Should this amenity be a high, medium or low priority for the Center, or should the Center not include this amenity?						
	<i>Randomize</i>	High Priority	Medium Priority	Low Priority	Should not include in Center	No Opinion	Refused
A	General purpose rooms that can be used for meetings, conferences and classes	41%	45%	11%	2%	0%	0%

B	Special purpose rooms that can be used for activities like arts and crafts, dance, and aerobics	41%	47%	10%	1%	1%	0%
C	Fitness and exercise facilities such as a gymnasium and weight room	39%	32%	21%	7%	1%	0%
D	Indoor courts for sports like basketball, volleyball and racquetball	38%	36%	20%	5%	1%	0%
E	A community stage	33%	44%	18%	3%	2%	0%
F	Public art displays like fountains, murals and statues	22%	42%	29%	6%	1%	0%
G	Banquet facilities available for rental	29%	43%	21%	6%	1%	0%
H	A computer lab for drop-in and classroom use	38%	39%	16%	7%	1%	0%
I	Senior Center	50%	36%	11%	2%	1%	0%
Q18	Are there any particular amenities that I did not mention that you think should be a high priority for inclusion in the Community Center? <i>If yes, ask: Please describe the amenity.</i>						
	No other high priorities						81%
	Swimming pool						2%
	Reading room / Library						1%
	Theatre / Auditorium						1%
	Tutoring center						1%
	Activities for disabled						1%
	Programs for seniors						1%
	Kitchen						1%
	Snack bar / Vending machines						1%
	Daycare facilities						1%
	Recreation, game room						1%
	Garden / Arboretum						1%
	Programs for teens						1%
	Outdoor amphitheater						1%
	Social gathering rooms						1%
	Adequate parking						1%
	Generally oppose Community Center						1%
	Not sure						1%

Section 8: Neighborhood Issues							
Q19	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.						
	<i>Randomize</i>	Big Problem	Moderate Problem	Small Problem	Not a Problem	Not Sure	Refused
A	Graffiti	7%	12%	20%	60%	1%	0%
B	Recreational vehicles parked on the street for more than 72 hours at a time	6%	12%	14%	67%	1%	0%
C	Landscapes and buildings not being properly maintained	5%	13%	21%	61%	0%	0%
D	Too many people living in one house	18%	11%	14%	55%	2%	0%
E	Excessive noise	9%	12%	20%	59%	0%	0%
F	Illegally parked vehicles	13%	16%	18%	53%	1%	0%
G	Too many vehicles for a single home	24%	18%	16%	40%	1%	0%
H	Garages that have been converted to living spaces	10%	9%	12%	65%	4%	0%
I	Foreclosed homes that aren't being maintained	9%	11%	19%	60%	2%	0%
Q20	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? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>						
	1	Very satisfied	38%		Skip to Q22		
	2	Somewhat satisfied	23%		Skip to Q22		
	3	Somewhat dissatisfied	6%		Ask Q21		
	4	Very dissatisfied	6%		Ask Q21		
	98	No Opinion	27%		Skip to Q22		
	99	Refused	0%		Skip to Q22		
Q21	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>						
	Housing issues / Lawns / Garages		41%				
	Illegal car parking		33%				
	Too many vehicles per property		19%				
	Not sure / Nothing specific		16%				
	Trash in road, public places		5%				

Section 9: City-Resident Communication				
Q22	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	51%	
	2	Somewhat satisfied	34%	
	3	Somewhat dissatisfied	7%	
	4	Very dissatisfied	3%	
	98	Not sure	4%	
	99	Refused	1%	
Q23	Is there a particular topic or issue that you'd like to receive more information about from the City?			
	1	Yes	31%	Ask Q24
	2	No	68%	Skip to Q25
	99	Refused	1%	Skip to Q25
Q24	Please briefly describe the topic. <i>Probe:</i> Any other topics?			
	Sports Park, recreation facilities		11%	
	Current events, activities		9%	
	Traffic issues		9%	
	Construction, development projects		8%	
	Crime reports, prevention		8%	
	Misuse of garages for living space		8%	
	Animal control / Animal shelter		5%	
	Council Meetings		5%	
	Community Center		4%	
	Recreational activities		4%	
	Emergency preparedness		3%	
	Foreclosures		3%	
	Adult education opportunities		3%	
	Code enforcement, laws		3%	
	Illegal immigration		3%	
	Recycling / Waste disposal		3%	
	Parking		2%	
	Budgeting, expenditures		2%	
	Pet ordinances		2%	
	Schools, education		2%	

		Sex offenders	1%
		Noise abatement	1%
		Activities, services for disabled	1%
		Affordable housing	1%
Q25	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>		
	1	Saddleback Valley News	8%
	2	Orange County Register	12%
	3	Los Angeles Times	1%
	4	The Leaflet - City Newsletter	43%
	5	Leisure Times - City Newsletter	3%
	6	City Newsletter - no mention of Leaflet or Leisure Times	21%
	7	E-newsletter - electronic newsletter	4%
	8	Redevelopment Newsletter / 'A View from the Arbor'	0%
	9	City Council Meetings	1%
	10	Radio	1%
	11	Television	2%
	12	Internet, not a City site	14%
	13	City Website (not specific)	22%
	14	The Arbor (redevelopment)	0%
	15	Skatepark site (Etnies)	0%
	16	Lake Forest Seniors site	1%
	17	Lake Forest Teens site	0%
	18	Main City Web Page/ Gov Populous	1%
	19	Flyers at City Facilities	1%
	20	Friends / Other People	3%
	21	Other source	4%
	22	Do Not Receive Information about City	0%
	98	Not sure	3%
	99	Refused	1%
Q26	In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?		
	1	Yes	49% Ask Q28
	2	No	49% Skip to D1
	99	Refused	2% Skip to D1

	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	41%
	2	No	58%
	99	Refused	0%
D3	Some residents live in Homeowners Associations and some do not. Do you live in a Homeowners Association?		
	1	Yes	75%
	2	No	24%
	99	Refused	1%
D4	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	8%
	2	\$40,000 to \$59,999	10%
	3	\$60,000 to \$79,999	14%
	4	\$80,000 to \$99,999	16%
	5	\$100,000 or more	37%
	98	Not sure	3%
	99	Refused	12%
Thank you for participating! This survey was conducted for the City of Lake Forest.			

Section 11: Post-Interview & Sample Items

D5	Gender		
	1	Male	48%
	2	Female	52%
S1	Party		
	1	Democrat	27%
	2	Republican	50%
	3	Other	4%
	4	DTS	19%

S2	Age		
	1	18 to 29	13%
	2	30 to 39	17%
	3	40 to 49	26%
	4	50 to 64	29%
	5	65 or older	15%
S3	Registration Year		
	2008 to 2005		28%
	2004 to 2001		31%
	2000 to 1997		18%
	1996 to 1990		14%
	Before 1990		10%
S4	Household Party Type		
	1	Single Dem	11%
	2	Dual Dem	8%
	3	Single Rep	17%
	4	Dual Rep	23%
	5	Single Other	11%
	6	Dual Other	5%
	7	Dem & Rep	9%
	8	Dem & Other	5%
	9	Rep & Other	10%
	0	Mixed (Dem + Rep + Other)	2%
S5	Likely to Vote by Mail		
	1	Yes	38%
	2	No	62%
S6	Home Owner		
	1	Yes	72%
	2	No	28%

S7	Geographic area of City	
	One	20%
	Two	22%
	Three	35%
	Four	23%

BUSINESS SURVEY



City of Lake Forest
Business Survey
Final Toplines
December 2008

Section 1: Introduction to Study

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

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	19%
2	5 years to less than 10 years	33%
3	10 years to less than 15 years	21%
4	15 or more years	24%
99	Refused	3%

Q2 What do you feel are the one or two most important issues facing the business community of Lake Forest?

Cannot think of any issues	33%
Nation economic concerns	23%
Traffic congestion	6%
Taxes / Fees	5%
Growth / Development	4%
Affordability, availability of commercial space	4%
Location of City / Access to freeways	4%
Advertising, marketing opportunities	3%
Competition from other businesses	3%
Networking opportunities	3%
Customer satisfaction	3%
Beautifying, landscaping City	2%
Cost of living	2%

	Government communication, cooperation	2%
	Illegal immigrants / Day laborers	2%
	Signage issues	2%
	Crime / Public safety	1%
	Demographics of populace	1%
	Pollution / Environmental concerns	1%
	Overall quality of life	1%
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	21%
	2 Good	42%
	3 Fair	23%
	4 Poor	2%
	5 Very poor	1%
	98 Not sure	9%
	99 Refused	2%
Q4	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.	
	Not sure / Cannot think of anything	37%
	Location in general	12%
	Freeway access / Proximity to surrounding areas	9%
	City's pro-business efforts, helpful attitude	9%
	Taxes / Fees / Licensing	5%
	Quality, image of City, local community	4%
	Number, quality of local businesses, retailers	3%
	Demographics of community	3%
	Quality, quantity of housing stock	3%
	Open, available land / New construction	2%
	Proximity of business to home	2%
	Redevelopment, infrastructure improvements	2%
	Visibility of business / Amount of customer traffic	1%
	Low crime rate	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</i>): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?		
	1	Very satisfied	49%
	2	Somewhat satisfied	38%
	3	Somewhat dissatisfied	2%
	4	Very dissatisfied	3%
	98	Not sure	8%
	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		15%
	Improve support of businesses, communication		12%
	Nothing, keep up good work		8%
	Maintain, improve infrastructure		7%
	Redevelop, beautify, landscape City		7%
	Reduce taxes, fees, costs		7%
	Continue to grow, zone commercial, industrial		6%
	Reduce traffic / Time traffic lights		5%
	Offer, improve advertising opportunities		4%
	Limit growth, population increase		3%
	Improve public safety		3%
	Increase economic development		3%
	Improve environmental efforts		3%
	Address immigration, day laborer issues		2%
	Lower housing, real estate costs		2%
	Improve code enforcement		1%
	Improve signage regulations		1%
	Improve recreation facilities, programs		1%
	Improve parking, parking 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	No Opinion	Refused
A	Providing business watch programs	9%	32%	36%	16%	6%	0%
B	Investigating criminal activity	20%	61%	15%	4%	1%	0%
C	Enforcing traffic laws	12%	44%	34%	10%	1%	0%
D	Maintaining a low crime rate	29%	63%	8%	0%	0%	0%
E	Providing building permit services	5%	34%	31%	27%	3%	0%
F	Providing building inspection services	5%	23%	42%	28%	2%	0%
G	Promoting economic development	14%	58%	19%	7%	2%	0%
H	Promoting redevelopment	8%	38%	38%	15%	1%	1%
I	Providing business education events	8%	21%	44%	28%	0%	0%
J	Providing business networking events	9%	27%	41%	23%	0%	0%
K	Providing free business consulting services	5%	24%	37%	31%	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	24%	40%	7%	2%	27%	0%
B	Investigate criminal activity	43%	37%	7%	2%	12%	0%
C	Enforce traffic laws	44%	41%	3%	3%	8%	0%
D	Maintain a low crime rate	53%	34%	5%	2%	6%	0%
E	Provide building permit services	25%	34%	4%	1%	36%	0%
F	Provide building inspection services	26%	36%	5%	2%	32%	0%
G	Promote economic development	27%	44%	8%	3%	19%	0%
H	Promote redevelopment	29%	44%	5%	2%	21%	0%

I	Provide business education events	24%	41%	5%	3%	27%	0%
J	Provide business networking events	22%	41%	8%	3%	26%	0%
K	Provide free business consulting services	18%	37%	7%	2%	36%	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?						
	<i>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Enforcing zoning regulations	8%	33%	32%	21%	6%	0%
B	Enforcing sign regulations	5%	30%	38%	25%	2%	0%
C	Street sweeping	7%	44%	35%	14%	0%	0%
D	Reducing traffic congestion	19%	54%	22%	5%	0%	0%
E	Maintaining local streets and roads	13%	69%	15%	3%	0%	0%
F	Landscaping median strips and other areas of the City	8%	43%	35%	14%	0%	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)?						
	<i>Randomize</i>	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Enforce zoning regulations	25%	43%	4%	2%	26%	0%
B	Enforce sign regulations	32%	42%	6%	2%	18%	0%
C	Provide street sweeping services	45%	43%	4%	1%	7%	0%
D	Reduce traffic congestion	29%	47%	15%	2%	7%	0%
E	Maintain local streets and roads	41%	50%	4%	2%	3%	0%
F	Landscape median strips and other areas of the City	46%	45%	2%	2%	5%	0%

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 your business location in Lake Forest.						
	<i>Randomize</i>	Big Problem	Moderate Problem	Small Problem	Not a Problem	Not Sure	Refused
A	Graffiti	7%	9%	18%	64%	2%	0%
B	Landscapes and buildings not being properly maintained	6%	9%	13%	70%	2%	0%
C	Excessive noise	2%	10%	15%	73%	0%	0%
D	Illegally parked vehicles	8%	9%	18%	64%	1%	0%
E	Illegal signs	3%	6%	10%	76%	5%	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 enforce 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	25%		Skip to Q14		
	2	Somewhat satisfied	31%		Skip to Q14		
	3	Somewhat dissatisfied	3%		Ask Q13		
	4	Very dissatisfied	5%		Ask Q13		
	98	Not sure	36%		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 recorded		Data for 15 respondents on file				

Section 5: Go Local Transit		
Q14	How many people are currently employed at your worksite in Lake Forest?	
	1 to 2	41%
	3 to 5	19%
	6 to 10	20%
	11 to 25	14%
	More than 25	5%
	Refused	1%

Q15	Approximately how many of these employees live outside of Lake Forest?		
	None		34%
	1 to 2		15%
	3 to 5		21%
	6 to 10		14%
	11 to 25		13%
	More than 25		1%
	Refused		2%
<i>If Q15 = (0, 99999) skip to Q20. Otherwise ask Q16.</i>			
Q16	Do any of these employees currently use the Metrolink train to commute to work? (65% of business owners received this question)		
	1	Yes	5% Ask Q17
	2	No	94% Skip to Q18
	99	Refused	1% Skip to Q18
Q17	Approximately how many employees currently commute to work on Metrolink?		
	Number recorded		Total of 6 employees
Q18	If local shuttles were available to transport employees between the Metrolink station and your business site, would it increase the number of employees at your site who use Metrolink? (65% of business owners received this question)		
	1	Yes	27% Ask Q19
	2	No	70% Skip to Q20
	99	Refused	2% Skip to Q20
Q19	Approximately how many employees would start using Metrolink if the shuttles were available? (18% of business owners received this question)		
	None		2%
	1 to 2		48%
	3 to 5		26%
	6 to 10		10%
	11 to 25		3%
	More than 25		0%
	Refused		11%

Q20	Does your business currently provide incentives for employees to use public transit?		
	1	Yes	2%
	2	No	97%
	99	Refused	1%
<i>Only ask Q21 if Q16 = 1 or Q18 = 1.</i>			
Q21	Would your business be willing to help pay the costs of operating shuttles between your business site and the Metrolink station? (20% of business owners received this question)		
	1	Yes	28%
	2	No	42%
	99	Refused	30%

Section 6: City-Business Communication

Q22	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: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>		
	1	Very satisfied	38%
	2	Somewhat satisfied	39%
	3	Somewhat dissatisfied	9%
	4	Very dissatisfied	5%
	98	Not sure	8%
	99	Refused	1%
Q23	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. If they say Internet or web, probe to see if a City website and, if yes, which one.</i>		
	1	Saddleback Valley News (paper)	3%
	2	Orange County Register (paper)	10%
	3	Los Angeles Times (paper)	1%
	4	The Leaflet - City Newsletter	22%
	5	Leisure Times - City Newsletter	1%
	6	City Newsletter - no mention of Leaflet or Leisure Times	23%
	7	E-newsletter - electronic newsletter	3%
	8	Redevelopment Newsletter / 'A View from the Arbor'	0%
	9	City Council Meetings	0%
	10	Radio	2%
	11	Television	0%

12	Internet, not a City site	18%			
13	City Website (not specific)	23%			
14	The Arbor (redevelopment)	0%			
15	Skatepark site (Etnies)	0%			
16	Lake Forest Seniors site	0%			
17	Lake Forest Teens site	0%			
18	Main City Web Page/ Gov Populous	2%			
19	Flyers at City Facilities	2%			
20	Friends / Other People	3%			
23	Other newspaper or periodical	2%			
24	Chamber of Commerce	2%			
22	Do not receive information about City	7%			
98	Not sure	4%			
99	Refused	2%			
Q24	In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?				
1	Yes	50%	Ask Q25		
2	No	50%	Skip to Q26		
99	Refused	0%	Skip to Q26		
Q25	Are you satisfied or dissatisfied with the resources and content 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	47%			
2	Somewhat satisfied	47%			
3	Somewhat dissatisfied	1%			
4	Very dissatisfied	2%			
98	Not sure	2%			
99	Refused	1%			
Q26	The City of Lake Forest is considering publishing a newsletter on business topics and news in the City. As I read each of the following topics, please indicate whether you are very interested, somewhat interested, or not interested in this topic.				
	<i>Randomize</i>	Very Interested	Somewhat Interested	Not Interested	Not sure / Refused
A	Updates on City projects	46%	35%	19%	1%
B	Profiles of local companies	46%	35%	19%	1%
C	Market information	45%	34%	19%	2%

D	Interviews with CEO's	26%	36%	37%	1%
E	Business tips from local businesses	34%	44%	21%	1%
Q27	Is there a particular business topic that I didn't mention that you'd like to be addressed in the City's newsletter? <i>If yes, ask: Please briefly describe it to me.</i>				
	Not sure / Cannot think of any topics	78%			
	Planning, future projects, businesses	5%			
	Networking opportunities	4%			
	Business management, growth	3%			
	Other topic (unique responses)	3%			
	Calendar of events / Community services	2%			
	Financial, economic info	2%			
	Residential, housing info	1%			
	Codes / Regulations	1%			
	Public safety	1%			
Q28	The City of Lake Forest is also considering hosting a variety of workshops for local businesses. As I read each of the following types of seminars, please indicate whether you would be very interested, somewhat interested, or not interested in attending the seminar.				
	<i>Randomize</i>	Very Interested	Somewhat Interested	Not Interested	Not sure / Refused
A	Starting a business and developing a business plan	18%	28%	52%	1%
B	Understanding business finance	19%	33%	47%	1%
C	Business job fair and expo	25%	36%	37%	2%
D	Payroll and tax reporting requirements	12%	33%	53%	1%
E	Business marketing and sales	31%	35%	33%	1%
F	Business legal issues	25%	36%	38%	2%
G	Business networking events	36%	34%	28%	2%
H	Roundtable discussion on specific topics	18%	36%	44%	2%

Section 8: Background & Demographics

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

D1	What would you say is the most important factor for why you chose to locate your business in the City of Lake Forest? <i>Do not read list, record first response</i>		
	1	Competitive lease rates/building rents	6%
	2	Quality business parks	0%
	3	Proximity to freeways/transportation corridors	5%
	4	Quality of housing stock	0%
	5	Overall quality of the City	7%
	6	Local amenities (dining/shopping)	3%
	7	Close to clients/customers	12%
	8	Close to owner's home	35%
	9	Purchased existing business, other owner's decision	4%
	10	Availability of land, zoning	4%
	11	Surrounding business community	3%
	12	Convenience of location in general	7%
	13	Workforce, availability of employees	2%
	97	Other (unique responses)	1%
	99	Not sure / Refused	10%
D2	In the next 12 months, do you think your business will increase, decrease or stay about the same?		
	1	Increase	42% Ask D3
	2	Decrease	15% Skip to D4
	3	Stay about the same	38% Skip to D4
	98	Not sure	3% Skip to D4
	99	Refused	2% Skip to D4
D3	To accommodate the growth in your business, will you require additional square footage or a larger building?		
	1	Yes	19%
	2	No	79%
	98	Not sure	2%
	99	Refused	0%

D4	In the next 12 months, do you think your business will relocate?		
	1	Yes	7% Ask D5
	2	No	87% Skip to D7
	98	Not sure	4% Skip to D7
	99	Refused	2% Skip to D7
D5	Will you be relocating your business within Lake Forest or to another community?		
	1	Lake Forest	16% Skip to D7
	2	Another community	62% Ask D6
	98	Not sure	21% Skip to D7
	99	Refused	0% Skip to D7
D6	Is there a particular reason why your business is leaving Lake Forest? <i>If yes, ask: Please describe the reason.</i>		
	Verbatim responses recorded		Data for 7 respondents on file
D7	Last question for you. Are you a resident of Lake Forest?		
	1	Yes	45%
	2	No	53%
	99	Refused	2%
Thank you for participating! This survey was conducted for the City of Lake Forest.			

Section 12: Post-Interview & Sample Items

S1	Gender		
	1	Male	61%
	2	Female	39%
S2	Sample Subgroup (weighted responses shown)		
	1	C-FR	6%
	2	C-Southwest	7%
	3	C-Midcity	7%
	4	C-RDA	8%
	5	Homeoccs	32%
	6	I-AspanLambert	6%

7	I-Midcity	9%
8	I-FRPH	3%
9	I-RDA	1%
10	Office	13%
11	Other	7%