

COMMUNITY SATISFACTION STUDY  
REPORT ON SURVEYS OF RESIDENTS & BUSINESSES

PREPARED FOR THE  
CITY OF LAKE FOREST



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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 nine Departments—City Attorney, 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 regular 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 specific 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 have been conducted every two years between

1998 and 2008. 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 78). 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 December 10, 2010. 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 17-minute survey of business managers was administered to a stratified random sample of 200 local business owners and managers between December 10, 2010 and January 10, 2010. Data collection was suspended for approximately one week surrounding the Thanksgiving and Christmas holidays.

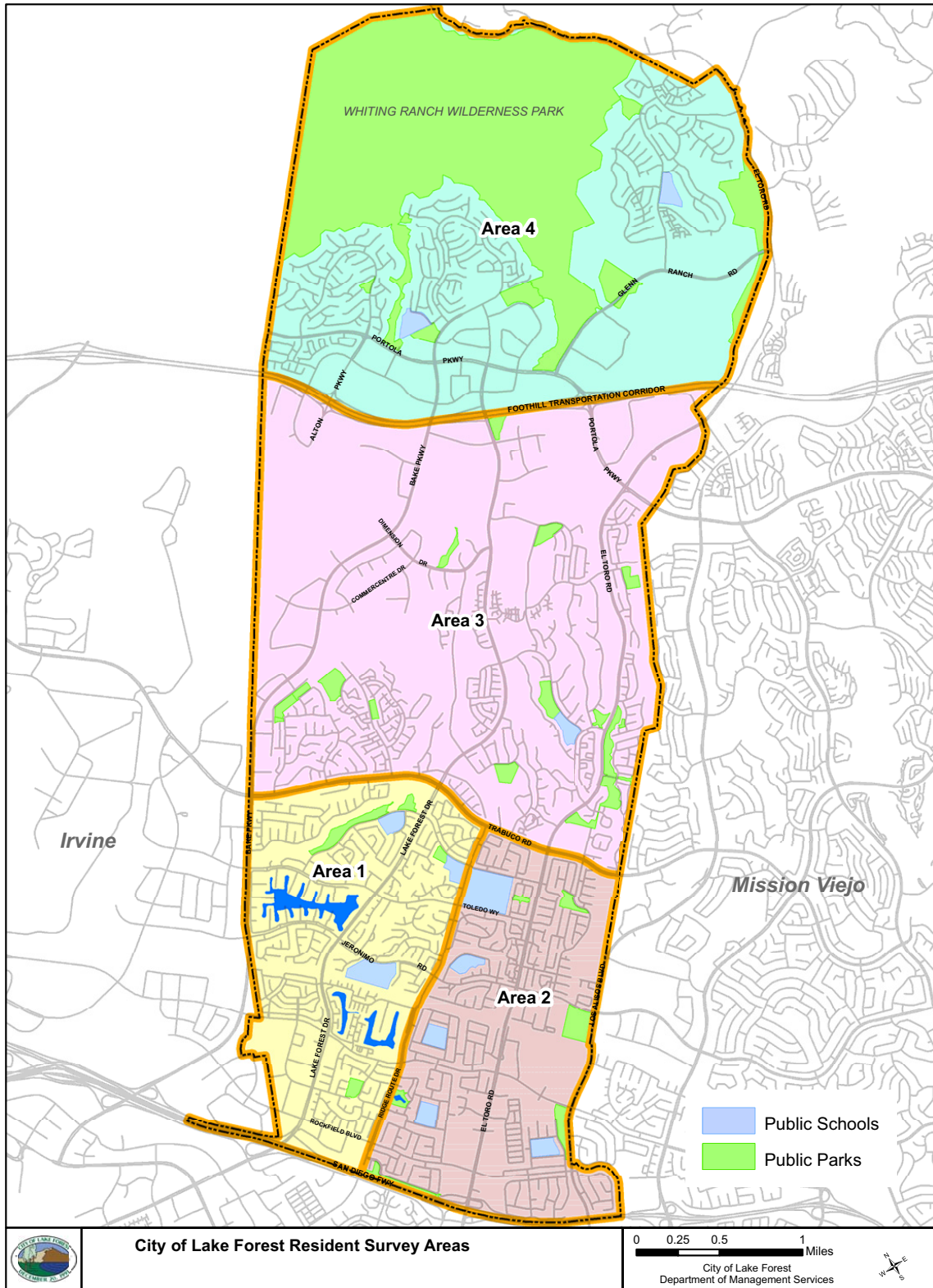
**STATISTICAL SIGNIFICANCE** As noted above, many of the figures and tables in this report present the results of questions asked in 2010 alongside the results found in previous surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify 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 2010 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

- Approximately one-quarter (28%) 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 (15%), the state of the local economy and job market (13%), and crime and public safety (11%) were mentioned most often.
- 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 (29%). Among the specific issues mentioned, concerns about the economy (national, regional, or local) topped the list (14%), followed by concerns about taxes and fees (13%) and competition from other businesses in the Lake Forest area (4%).
- The vast majority of respondents shared very favorable opinions of the quality of life in Lake Forest, with 51% reporting it is excellent, 45% good, 4% said it is fair, and not a single resident said 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, 26% reported that it is excellent, 52% stated it is good, and 18% offered that it is fair. Just 4% of businesses indicated that, when compared with neighboring areas, the business climate in the City of Lake Forest is either poor or very poor.

### OVERALL SATISFACTION

- An overwhelming majority of residents (91%) and businesses (90%) stated that—overall—they were satisfied with the City's efforts to provide municipal services.
- Approximately one-third (35%) of local businesses stated that there were no particular features of Lake Forest that benefit their business or that they could not think of any at the time of the interview. Among the specific aspects that were mentioned, proximity to local freeways and surrounding areas of interest (21%), location in general (11%), the City's pro-business stance and helpfulness (9%), and low taxes/fees/licensing (6%) were mentioned most often.
- 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' for both residents and businesses. Increasing crime prevention and safety was the most frequently mentioned improvement sought by residents (11%), followed by reducing traffic congestion (9%), and increased/improved parks and recreation opportunities (8%). Businesses mentioned a desire for continued growth of the commercial and industrial zones in the City (15%), the improvement/maintenance of infrastructure (12%), and improved City communication and support of local businesses (12%).

## SPECIFIC SERVICES: RESIDENT SURVEY

- Among the services provided by the **Police**, residents rated maintaining a low crime rate as the most important service (95% extremely or very important), followed by investigating criminal activity (92%), and preparing for emergencies (81%). Residents were most satisfied with the Department's efforts to provide crossing guards near schools (97%), maintain a low crime rate (96%), and provide child safety programs (95%).
- Among the services provided by the **Development Services Department**, residents rated inspecting buildings as the most important service provided (61%), followed by enforcing zoning regulations (49%), issuing building permits (49%), and enforcing sign regulations (39%). Residents were similarly satisfied (92% to 94%) with the Department's efforts to provide all four services tested in the survey.
- Of the residents surveyed, just 10% 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**, maintaining local streets and roads was viewed by residents as the most important service (93%), followed by reducing traffic congestion (86%) and providing garbage and recycling services (84%). Residents were most satisfied with the Department's efforts to maintain public landscapes (97%), maintain parks and picnic areas (97%), and provide garbage and recycling services (96%).
- Among the services provided by the **Community Services Department**, residents assigned the highest importance to providing recreation and sports programs for teens (71%), followed by providing recreation and sports programs for elementary school-aged children (67%), and providing special events like concerts in the park (58%). Residents expressed the greatest levels of satisfaction with respect to the Department's efforts to provide special events (97%), followed by after school recreation and sports programs (93%) and recreation programs for families (93%).

## 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 (95%) as the most important of the services tested, followed by investigating criminal activity (85%) and promoting economic development (80%). At the top of the satisfaction scale was maintaining a low crime rate (96%), providing building inspection services (95%), and investigating criminal activity (94%).
- Among the **infrastructure-related services** provided by the City to local businesses, the business community rated maintaining local streets and roads as most important (85%), followed by reducing traffic congestion (71%), and street sweeping (57%). Overall, satisfaction was greatest with respect to the City's efforts to maintain local streets and roads (96%), provide street sweeping (96%), and landscape medians and other areas (95%).

## RECREATION CENTER PROGRAMMING

- When asked to identify their household's interest in a variety of programs and activities that could be offered at the new Recreation Center, interest was greatest for community activities and special events (83% very or somewhat interested), First Aid and CPR classes (83%), educational programs (82%), plays and theater performances (81%), and fitness and exercise programs (80%).

## CODE ENFORCEMENT & NEIGHBORHOOD ISSUES

- Among residents, 25% did not have an opinion regarding the City's code enforcement efforts. Of those with an opinion, approximately 14% were dissatisfied with the City's efforts in this respect, whereas the remaining respondents were either very (36%) or somewhat (26%) satisfied with the City's code enforcement efforts.
- Approximately one-third (31%) of Lake Forest residents indicated that their neighborhood is being affected by one or more issues that negatively impact the appearance, safety or overall quality of life in the neighborhood.
- When asked to describe the negative issues affecting their community in an open-ended manner, the most commonly mentioned issues were parking related (23%), unkempt properties (15%), landscaping issues (11%), condition of the sidewalks (9%), and drugs (9%).

## COMMUNICATION

- Overall, 86% of residents indicated that they were satisfied with the City's efforts to communicate with them through newsletters, the Internet, and other means.
- Overall, 84% of local businesses indicated that they were satisfied with the City's efforts to communicate with them through newsletters, the Internet, and other means.
- Approximately one-third (30%) of residents indicated there was a particular topic or issue that they'd like to receive more information about from the City. General requests for news and updates from the City was the most commonly mentioned topic of interest (14%), followed by information about construction and infrastructure improvements (14%), parks and recreation facilities (12%), and crimes in the city (11%).
- The most frequently cited source of information for City news among residents in 2010 was the City's newsletter, mentioned by name (*The Leaflet*) by 36% of respondents and referred to in general (the City's newsletter) by an additional 22% of residents. Other sources that were mentioned by at least 10% of residents included the City's website (18%), the Internet in general (23%), and the *Orange County Register* (14%).
- Members of the business community were most likely to mention the City's newsletter—generally (19%) and by its name *The Leaflet* (28%)—when asked what information sources they rely on for Lake Forest news, information and programming. Other commonly mentioned sources included the Internet in general (21%), City websites (19%), and the *Orange County Register* (18%).
- Lake Forest businesses indicated that direct mail to the office was the most effective method for the City to communicate with them (91% very or somewhat effective), followed by the City's website (85%), and email (83%).
- Fifty-four percent (54%) of residents indicated that they had visited at least one of the City's websites in the 12 months prior to the interview.
- Nearly two-thirds (64%) 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 91% of businesses indicating that they were satisfied with the resources available on the sites.
- Seventy-nine percent (79%) of residents who had visited the City's websites could not suggest a way in which the sites could be improved.

- Overall, residents indicated that the City websites were the most effective method for the City to communicate with them, followed by newsletters mailed directly to their home, electronic newsletters, and email.
- Just under one quarter (22%) of local businesses indicated that they had visited the City of Lake Forest's economic development website ([www.lakeforestbusiness.com](http://www.lakeforestbusiness.com)).
- When asked to rate their level of interest in a variety of topics that could be addressed on the City's economic development website, local businesses expressed the highest levels of interest in a Shop and Dine directory of local businesses (88% very or somewhat interested), followed by information on business seminars and workshops (83%), and news stories on grand openings and ribbon-cuttings (83%).
- Forty percent (40%) of local businesses recalled receiving the *In Business* newsletter during the prior year.
- When asked to rate their level of interest in a variety of topics that could be addressed in the *In Business* newsletter, local businesses expressed the highest levels of interest in updates on City projects (90%), profiles of local companies (87%), and business tips from other Lake Forest businesses (83%).
- When asked about their levels of interest in attending workshops and seminars, Lake Forest businesses expressed the greatest interest in attending business networking events (69% very or somewhat interested), followed by roundtable discussions on specific topics (65%), and workshops on legal issues that affect businesses (64%). Other events that were popular with at least 50% of those surveyed included a business job fair and expo (62%) and a seminar on marketing and sales (62%).
- Eighty-nine percent (89%) of Lake Forest businesses were aware of the Lake Forest Chamber of Commerce prior to taking the survey.
- Just under half (46%) of business survey respondents were unsure or could not think of a specific way in which the Chamber could benefit their business. Among the specific suggestions that were offered, advertising and promotional marketing opportunities were the most frequently cited (20%), followed by networking and business opportunities (15%), and providing a forum for discussing the business environment and related issues in the City (5%).

## 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, one-quarter (26%) indicated that it is close to the owner's home. Other reasons cited by at least 5% of respondents included the overall quality of life in the City (14%), its proximity to freeways (13%), clients and customers (10%), and the competitive lease and rental rates in the City (6%).
- Local businesses were generally optimistic about their future growth, with 60% anticipating growth and 36% expecting that their business would remain about the same. Just 2% indicated that they expect their business to decrease in the coming year.
- Of the 10% of businesses that anticipated relocating in the next year, approximately one-third (3%) expected to relocate to another community, 2% within Lake Forest, and 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?*

For the past decade, the City of Lake Forest has been committed to measuring and tracking the opinions of its residents and local businesses. More than just a profiling exercise, the City has been a leader in using the information gained from the studies to adjust and improve its services—all toward the goal of building and sustaining a high level of community satisfaction.

The results of the 2010 survey demonstrate that Lake Forest residents and businesses recognize and appreciate the City's commitment to aligning its efforts with their priorities and needs. Moreover, through its strategic use of customer feedback and resource allocation, the City has managed to continually improve its performance over time. The result: Lake Forest residents and businesses are not only one of the most satisfied communities that True North has ever encountered, their levels of satisfaction continue to grow as the City finds ways to improve and refine its performance over time.

In 2000, 89% of residents and 88% of local businesses indicated that they were generally satisfied with the job the City of Lake Forest was doing to provide municipal services. Although the overall satisfaction level increased modestly during the past decade to 91% for residents and 90% for businesses, 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 57% in 2010. The business community displayed even larger gains. Whereas 40% of business managers indicated that they were very satisfied with the City's overall performance in 2000, the corresponding figure in 2010 was 63%.

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. Equally impressive, in the past two years all of the statistically significant changes in the City's performance have been positive. In other words, residents and businesses perceived significant improvements in the City's performance in a variety of areas—including overall performance, communications, and select service areas—but did not identify a single instance of declining performance.

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 (96%) 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 satis-

faction. 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 24) and the most important issues facing the City (see *Local Issues* on page 13), as well as 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 40), the top priorities for residents are managing traffic congestion, helping to improve the local economy, improving public safety, and improving parks and recreational opportunities. For local businesses, the top priorities are improving the economy through economic development and redevelopment programs, expanding commercial and industrial zones in the City, reducing traffic congestion, and supporting local businesses with events and services.

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

*How well is the City communicating with residents and local businesses?*

The importance of City communication with residents and local businesses cannot be over-stated. 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 the City's many efforts to communicate with its residents and local business community include its newsletters, timely press releases, street banners, and its various websites.

The aforementioned recommendations regarding public information notwithstanding, it should be recognized that the City of Lake Forest continues to do an *outstanding* job communicating with residents and local businesses. The levels of satisfaction expressed by the Lake Forest resident and business communities with respect to the City's efforts to communicate with them 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. Between 2000 and 2010, for example, resident use of the City's websites increased from 18% to 54%. A similarly large increase occurred with local businesses' use of the City's websites (from 27% to 64% over the past decade). 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.

Of course, to continue to hold the attention of local businesses requires that the City be forward-looking in its communications and services. Fortunately, the 2010 survey provides some guidance for the City in this respect as business participants had the opportunity to identify the topics and events that they would find most relevant and interesting. For the economic development website ([www.lakeforestbusiness.com](http://www.lakeforestbusiness.com)), local businesses were most interested in a Shop and Dine directory of local businesses, information on business seminars and workshops, and news stories on grand openings and ribbon-cuttings. For the *In Business* newsletter, topics of interest included updates on city projects, profiles of local companies, and business tips provided by other Lake Forest businesses. And, among potential events that the City could host, businesses were most interested in networking events, roundtable discussions on specific topics, seminars on legal issues that affect businesses, and a local job fair and expo.

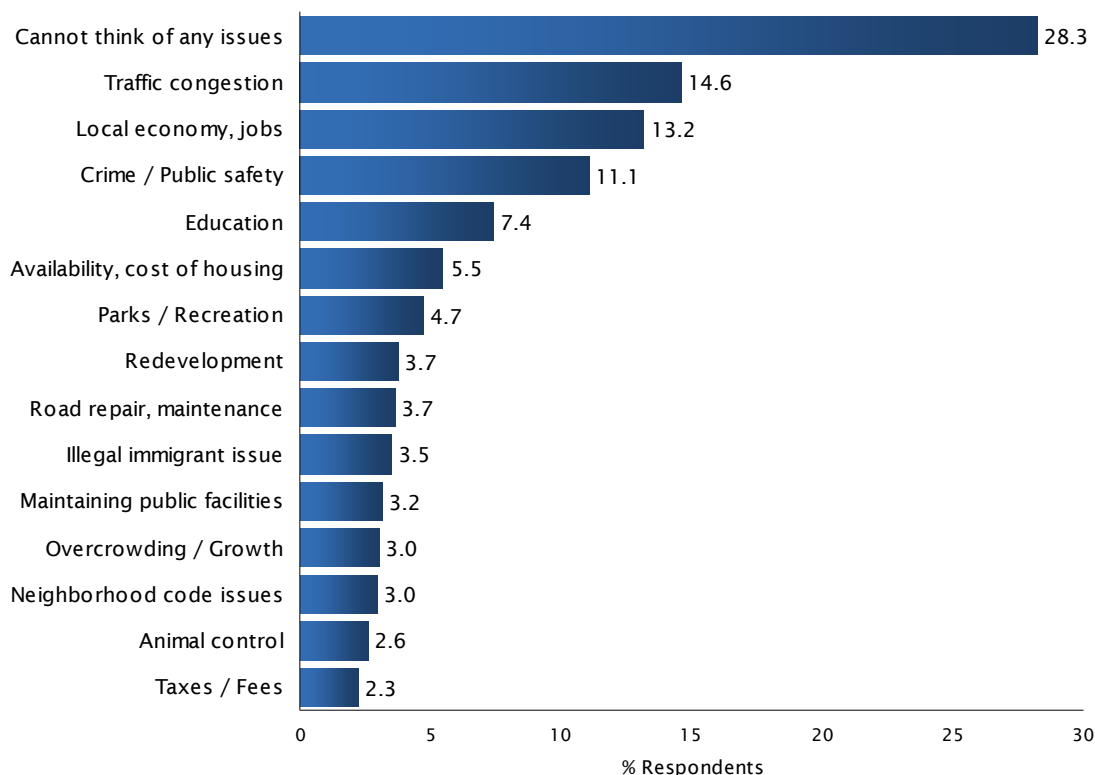
## GENERAL PERCEPTIONS OF CITY & LOCAL ISSUES

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 below for residents and Figure 3 on page 15 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**



Approximately one-quarter (28%) 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 (15%), the state of the local economy and job market (13%), and crime and public safety (11%) were mentioned most often.

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 and Marine Base issues were resolved in past years, concerns about traffic congestion, the local economy and job market, and public safety have risen. Most noteworthy from the table below over the past decade is the steady rise in the percentage of residents who were unable to identify a specific issue facing the community, resulting in its position at the top of the most-cited responses in 2008 and 2010.

**TABLE 1 TOP FIVE ISSUES FACING RESIDENTS (2010 ~ 2000)**

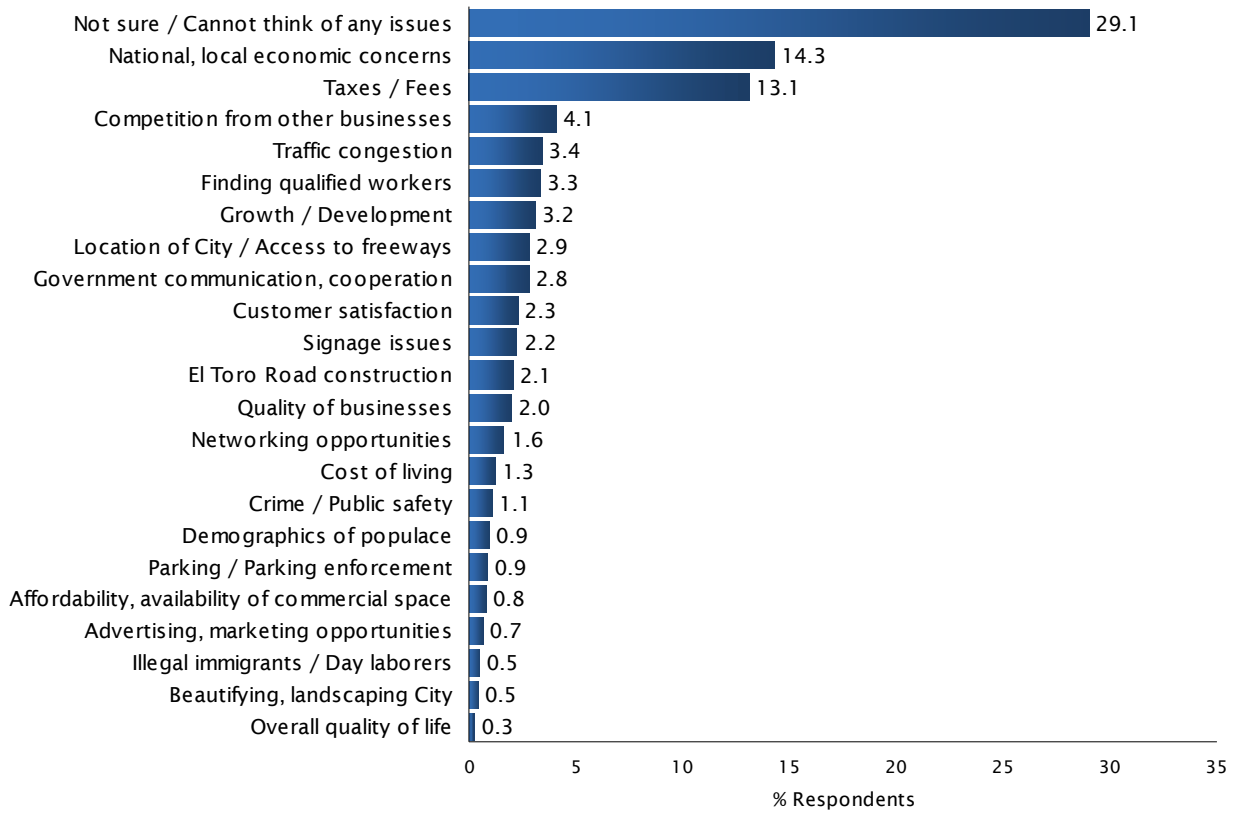
Study Year					
2010	2008	2006	2004	2002	2000
Cannot think of any issues	Cannot think of any issues	Traffic congestion	Traffic congestion	El Toro Airport / Marine Base	El Toro Airport / Marine Base
Traffic congestion	Traffic congestion	Cannot think of any issues	Cannot think of any issues	Traffic congestion	Traffic congestion
Local economy, jobs	Crime / Public safety	Crime / Public safety	Crime / Public safety	Cannot think of any issues	Crime / Public safety
Crime / Public safety	Local economy, jobs	Immigration / Day laborer issues	El Toro Airport / Marine Base	Crime / Public safety	Availability, cost of housing
Education	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 (29%). Among the specific issues mentioned, concerns about the economy (national, regional, or local) topped the list (14%), followed by concerns about taxes and fees (13%) and competition from other businesses in the Lake Forest area (4%). All other issues were mentioned by less than 4% of businesses surveyed. When compared with the 2006 study, concerns about the economy were far more salient in 2008 and 2010 (see Table 2).

**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**



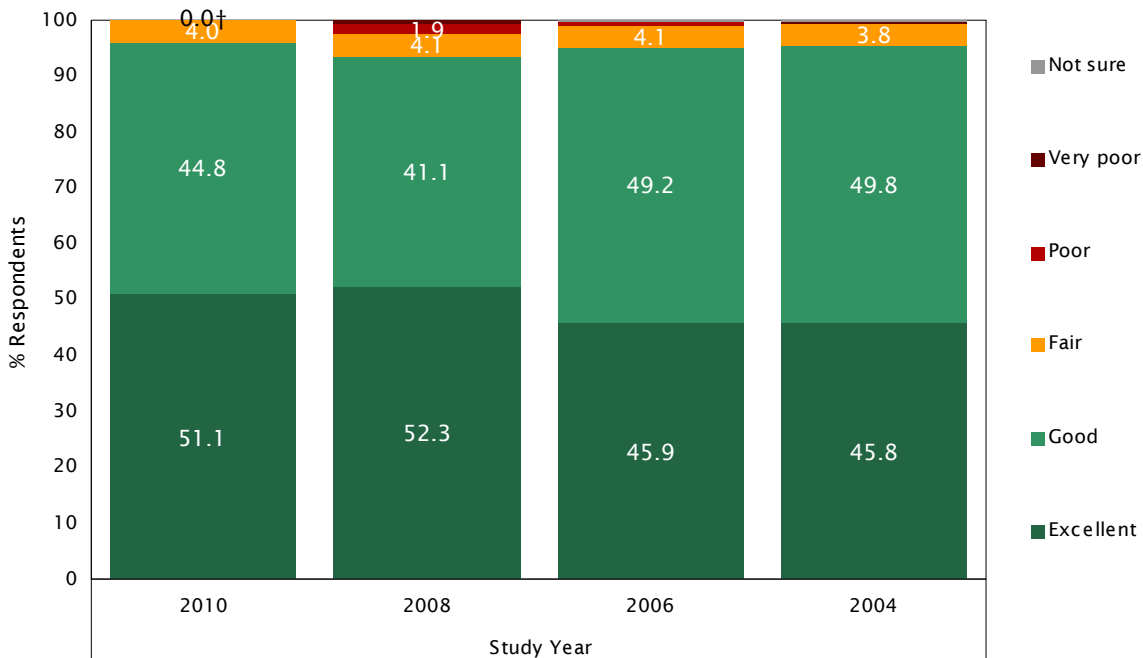
**TABLE 2 TOP FIVE ISSUES FACING BUSINESS COMMUNITY (2010 ~ 2000)**

Study Year					
2010	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	Cannot think of any issues	Traffic congestion
National, local economic concerns	National, local economic concerns	Traffic congestion	Traffic congestion	Traffic congestion	National, local economic concerns
Taxes / Fees	Traffic congestion	Taxes / Fees	Competition from other businesses	National, local economic concerns	El Toro Road
Competition from other businesses	Taxes / Fees	Competition from other businesses	Growth / Development	Recent loss of local businesses	Cost of living
Traffic congestion	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 51% reporting it is excellent, 45% good, 4% said it is fair, and not a single resident said that the quality of life in Lake Forest is poor or very poor, which was a statistically significant decrease from 2008.

**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 (2010 ~ 2004)**

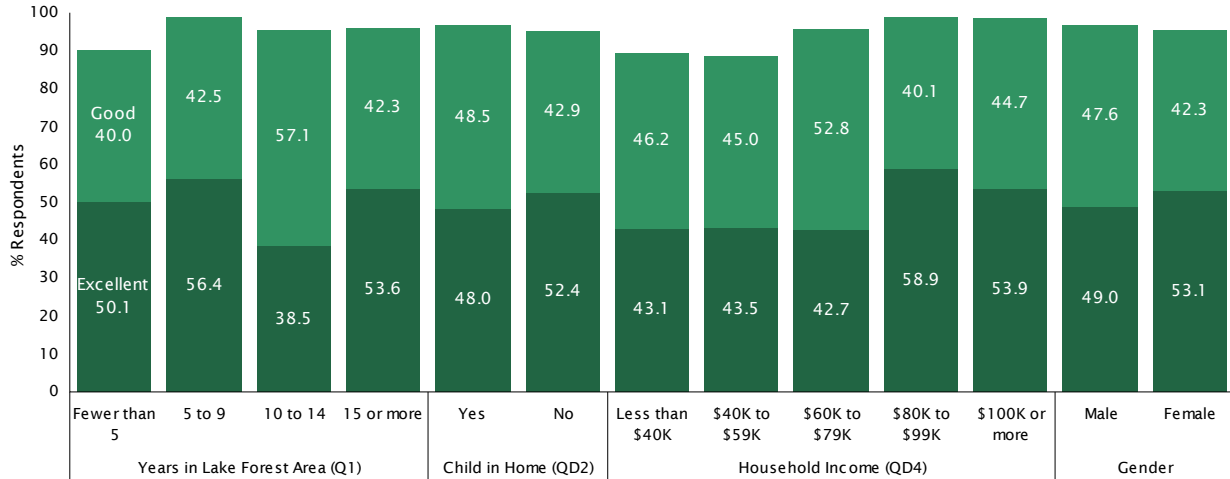


† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

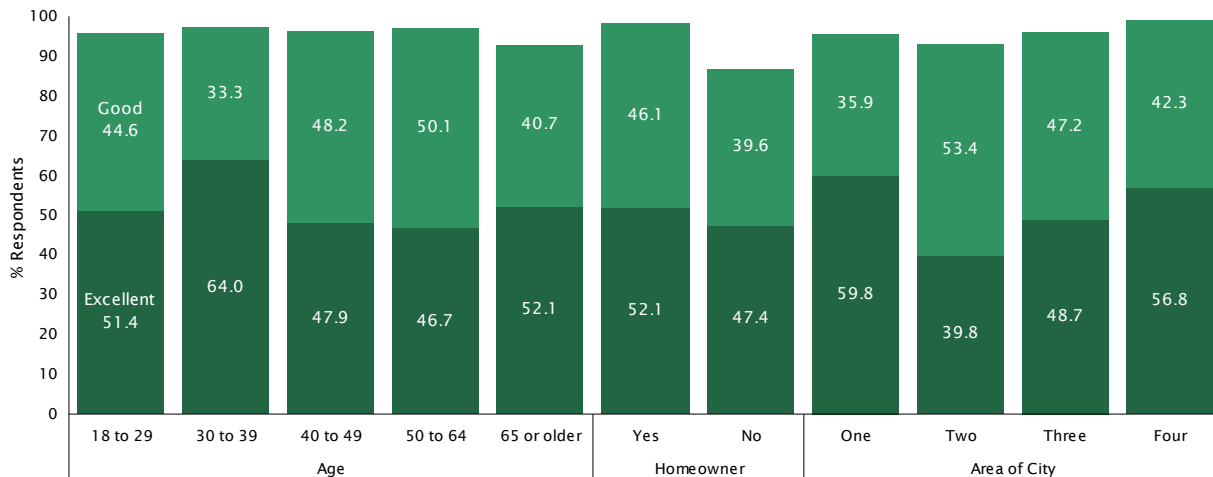
For the interested reader, Figures 5 and 6 show how ratings of the quality of life in the City varied by years of residence in Lake Forest, presence of a child in home, household income, gender, age of the respondent, home ownership status, and area of the city. Although there was some variation in opinion—e.g., 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 Lake Forest.



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



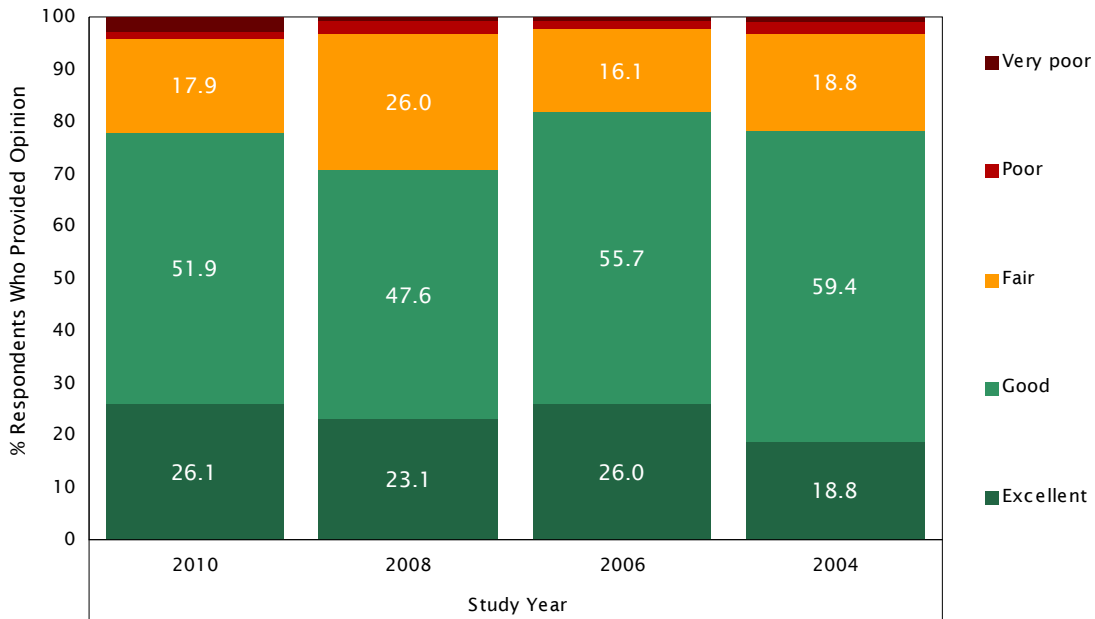
**FIGURE 6 OVERALL QUALITY OF LIFE BY AGE, HOME OWNER & AREA OF CITY**



**BUSINESS CLIMATE** Respondents in the business survey were similarly asked to rate the business climate in Lake Forest in comparison to 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, 26% reported that it is excellent, 52% stated it is good, and 18% offered that it is fair. Just 4% of businesses indicated that, when compared with neighboring areas, the business climate in the City of Lake Forest is either poor or very poor. When compared to 2008, the 2010 opinions of the business climate in Lake Forest were somewhat more favorable. This change in opinion likely reflects a general perception that the economy is on a path of recovery from the recession.

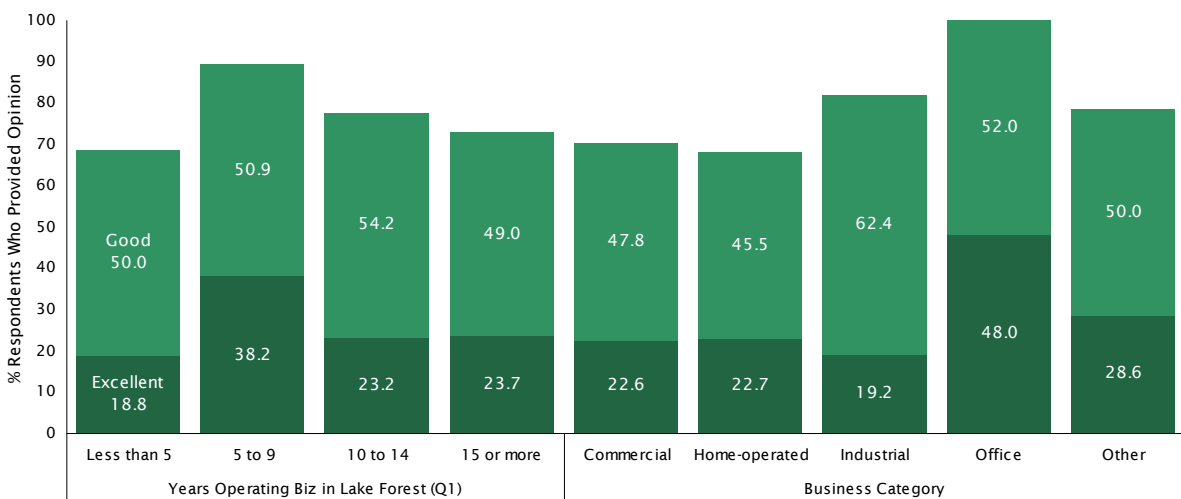
**Question 3: Business Survey** How would you rate the business climate in Lake Forest compared to other cities in the area? Would you say it is excellent, good, fair, poor, or very poor compared to other cities in the area?

**FIGURE 7 QUALITY OF BUSINESS CLIMATE (2010 ~ 2004)**

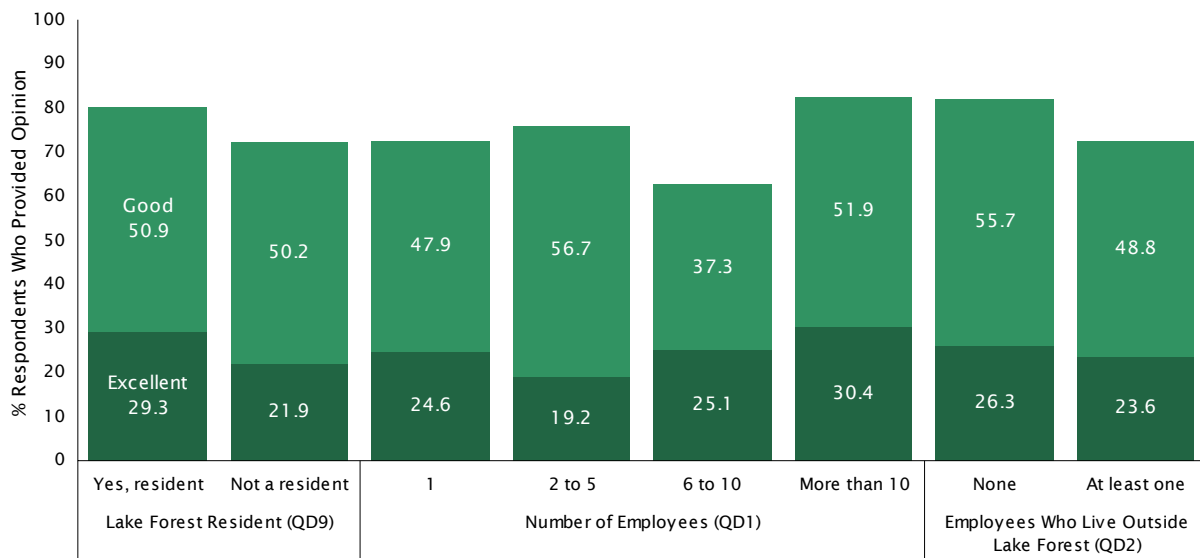


Figures 8 and 9 show how respondents' rating of the business climate in the City was related to the years they have operated their business in the City, the type of business they operate, whether the respondent was also a Lake Forest resident, the number of individuals employed at their business, and if any of their employees live outside the City of Lake Forest.

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



**FIGURE 9 QUALITY OF BUSINESS CLIMATE BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST**



## OVERALL SATISFACTION AND PERFORMANCE

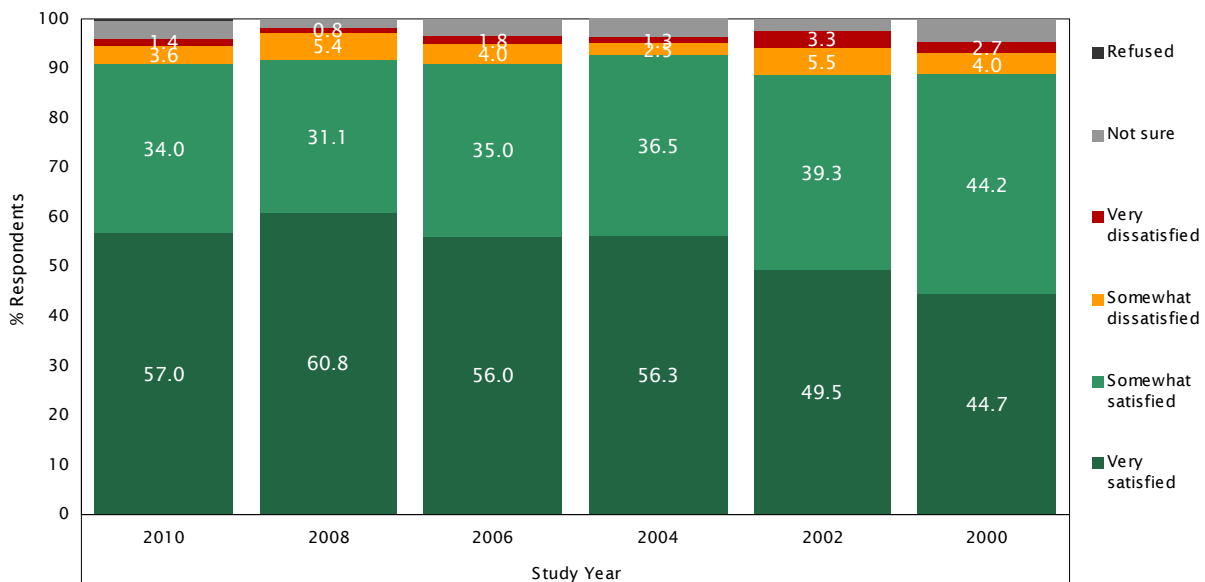
The next series of questions in the surveys addressed respondents' overall level of satisfaction with the job the City of Lake Forest is doing to provide city services, what aspects of the City are most beneficial to business owners and managers, as well as what they most want the City to accomplish in the next two years. Because of the overlap among these questions 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 10 presents the results to this question for the resident survey for 2010 and for prior surveys dating back to 2000, whereas Figure 13 on page 22 presents the corresponding results for the business survey. In both cases, the overwhelming majority of respondents indicated that they were satisfied with the City of Lake Forest's efforts to provide municipal services. Specifically, 91% of residents and 90% of local businesses in 2010 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 57% among residents and from 40% to 63% among businesses between 2000 and 2010. Of particular note is the large and statistically significant increase in the past year in the percentage of businesses that reported being *very* satisfied with the City's overall performance (see Figure 13).

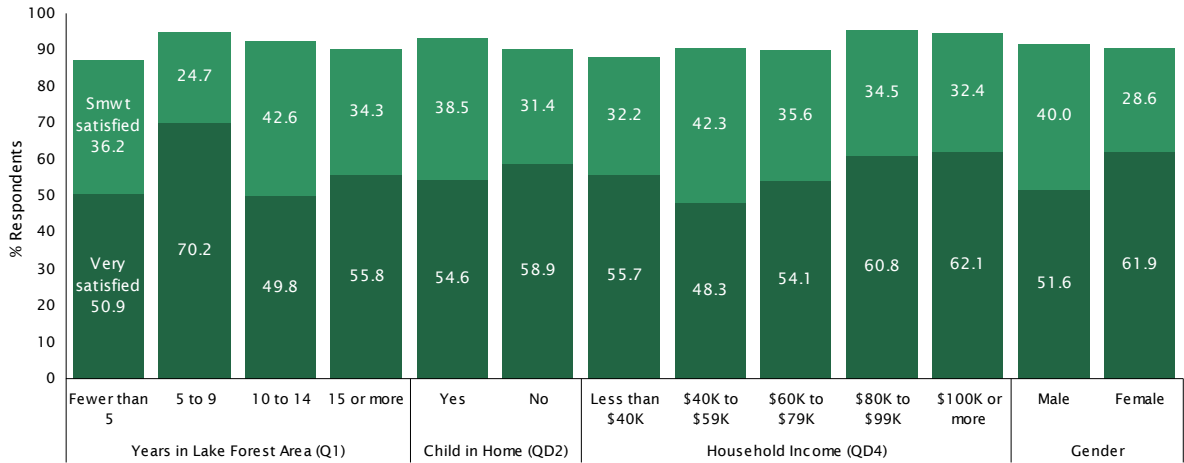
**Question 4: Resident Survey** *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

**FIGURE 10 OVERALL SATISFACTION: RESIDENT SURVEY (2010 ~ 2000)**

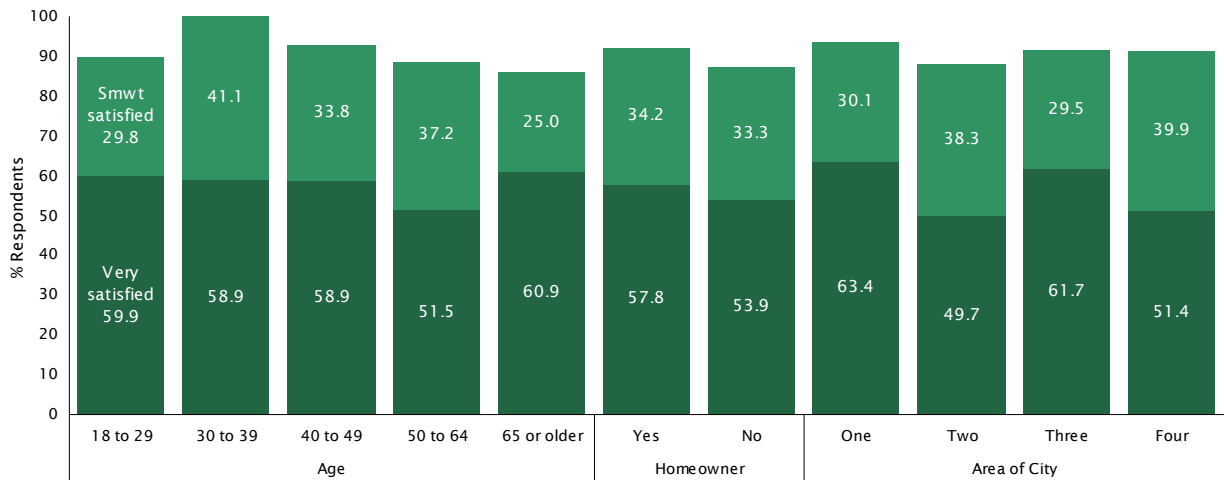


For the interested reader, Figures 11 and 12 display how overall satisfaction with the City’s performance in providing municipal services varied by key resident traits. Figures 14 and 15 present similar information for the business community.

**FIGURE 11 OVERALL SATISFACTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, CHILD IN HOME, HOUSEHOLD INCOME & GENDER**

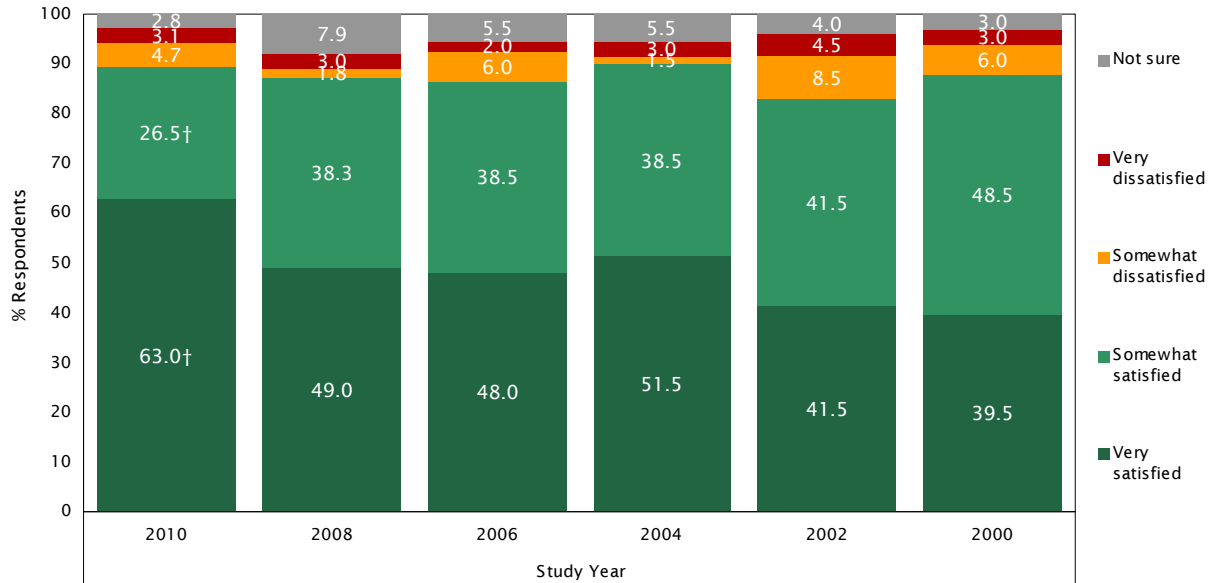


**FIGURE 12 OVERALL SATISFACTION: RESIDENT SURVEY BY AGE, HOME OWNER & AREA OF CITY**



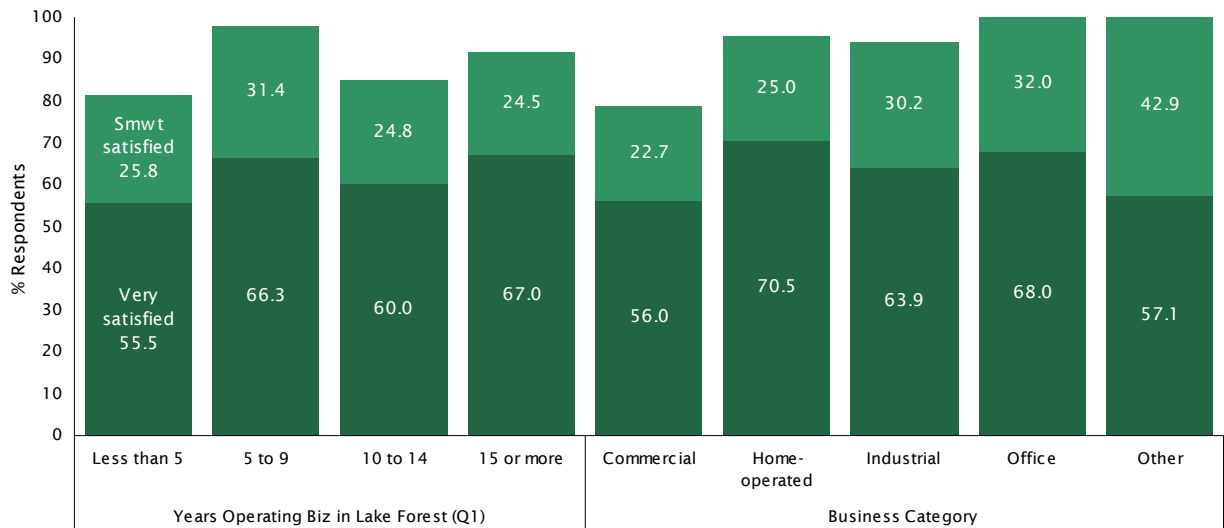
**Question 5: Business Survey** Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?

**FIGURE 13 OVERALL SATISFACTION: BUSINESS SURVEY (2010 ~ 2000)**

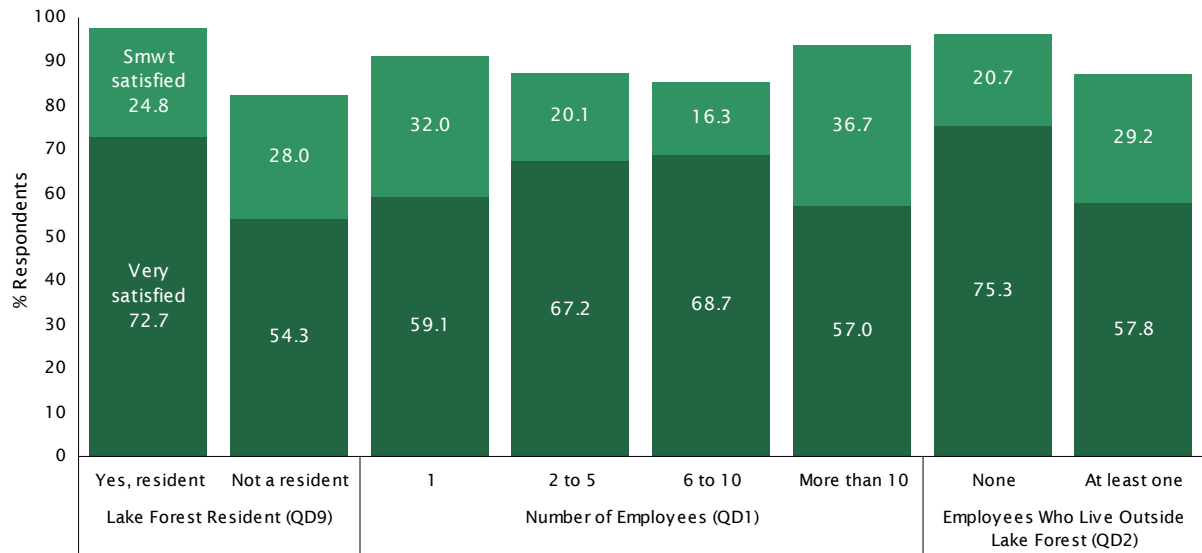


† Statistically significant change (p < 0.05) between the 2008 and 2010 studies.

**FIGURE 14 OVERALL SATISFACTION: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY**



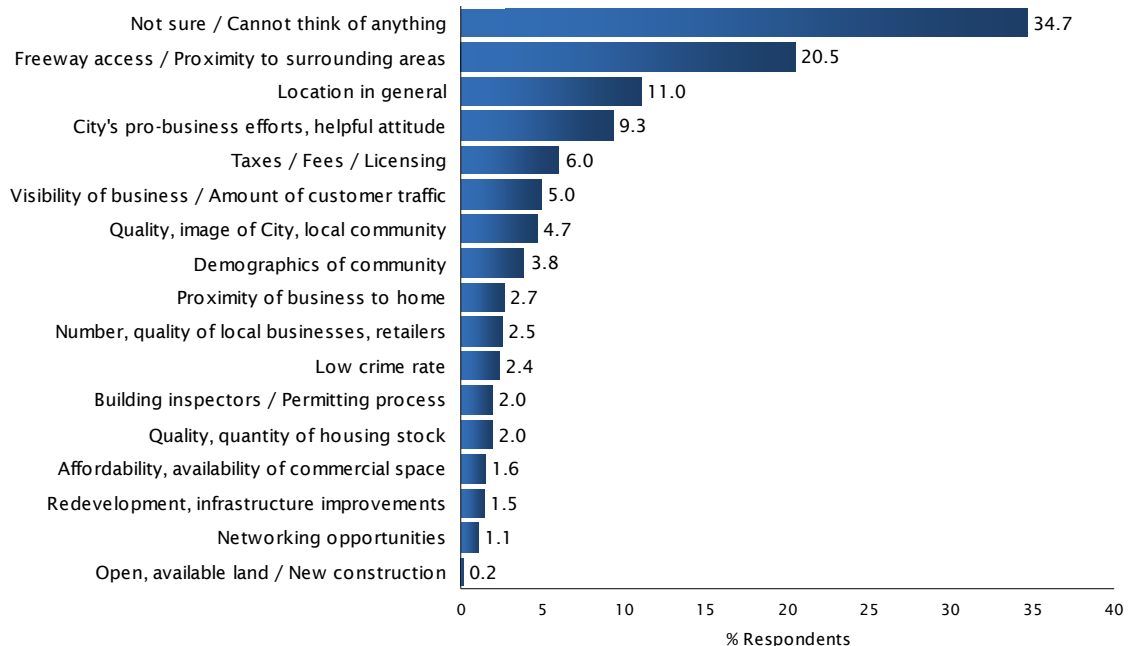
**FIGURE 15 OVERALL SATISFACTION: BUSINESS SURVEY BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST**



**ASPECTS OF LAKE FOREST MOST BENEFICIAL TO BUSINESS** All businesses were next asked if there was a particular aspect or feature of Lake Forest that is beneficial to their business. This question was posed in an open-ended manner, which allowed respondents to mention any aspect that came to mind without being prompted by—or restricted to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 16.

**Question 4: Business Survey** *Is there a particular aspect or feature of Lake Forest that is beneficial to your business?*

**FIGURE 16 ASPECTS OF CITY MOST BENEFICIAL TO BUSINESS**



The most common response in 2010 was that there were no particular features of Lake Forest that benefit their business or that they could not think of any at the time of the interview (35%). Among the specific aspects that were mentioned, proximity to local freeways and surrounding areas of interest (21%), location in general (11%), the City’s pro-business stance and helpfulness (9%), and low taxes/fees/licensing (6%) were mentioned most often. Although the order in which the aspects were mentioned has changed over time, the top five responses in 2010 were the same as those in 2008 (Table 3).

**TABLE 3 ASPECTS OF CITY MOST BENEFICIAL TO BUSINESS (2010 ~ 2006)**

Study Year		
2010	2008	2006
Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything
Freeway access / Proximity to surrounding areas	Location in general	Freeway access / proximity to surrounding areas
Location in general	City's pro-business efforts, helpful attitude	Location in general
City's pro-business efforts, helpful attitude	Freeway access / Proximity to surrounding areas	Quality, image of City, local community
Taxes / Fees / Licensing	Taxes / Fees / Licensing	Number, quality of local businesses, retailers

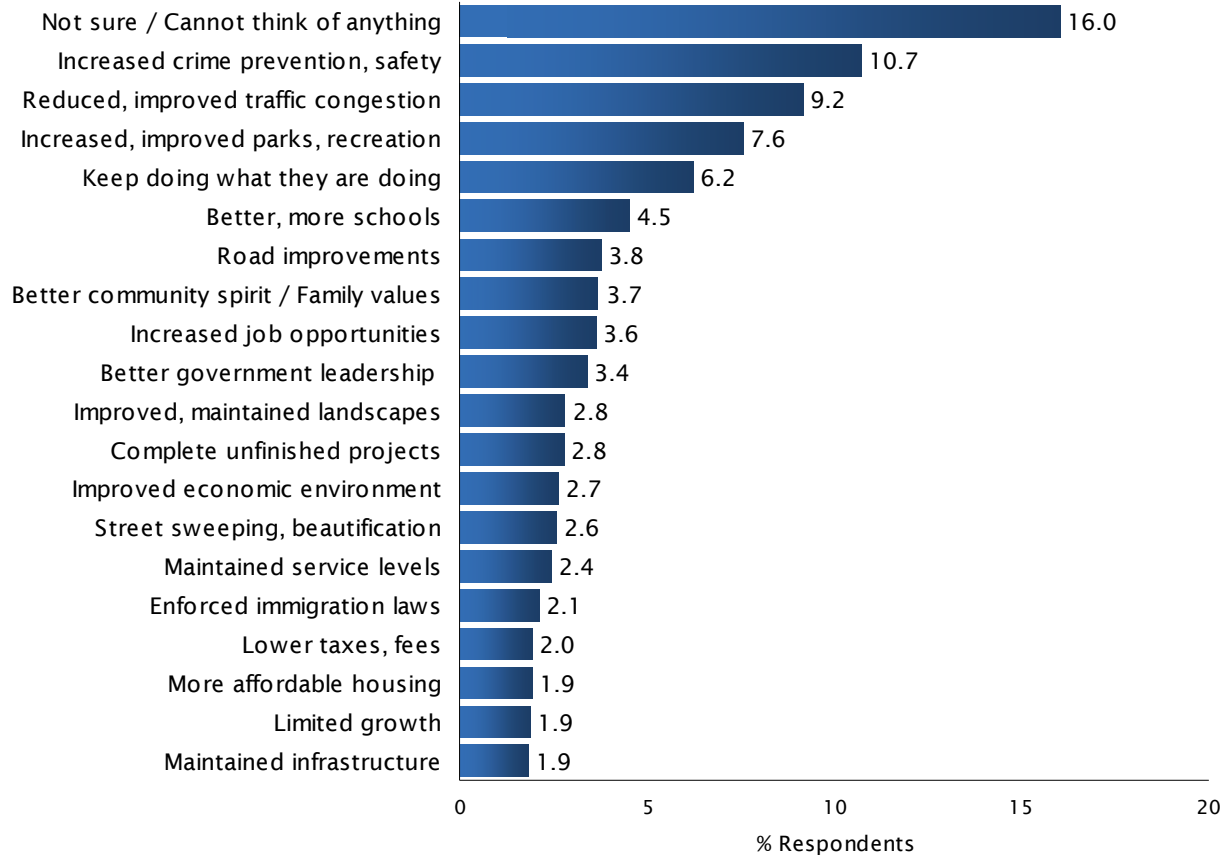
**WHAT I WANT MOST...** The final question in this series asked respondents in an open-ended manner to indicate what they most want the City to accomplish during the next two years. The answers to this question were recorded verbatim and were later grouped by True North into the categories shown in Figures 17 (Resident) and 18 (Business). In both cases, the most common response to this question was ‘not sure’ or ‘nothing’. Increasing crime prevention and safety was the most frequently mentioned improvement sought by residents (11%), followed by reducing traffic congestion (9%), and increased/improved parks and recreation opportunities (8%). Businesses mentioned a desire for continued growth of the commercial and industrial zones in the City (15%), the improvement/maintenance of infrastructure (12%), and improved City communication and support of local businesses (12%). It is worth noting that 6% of residents and 9% 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 4 and 5 display the five most common responses to this question in 2010, 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 17 WANT FROM LAKE FOREST IN NEXT TWO YEARS: RESIDENT SURVEY**

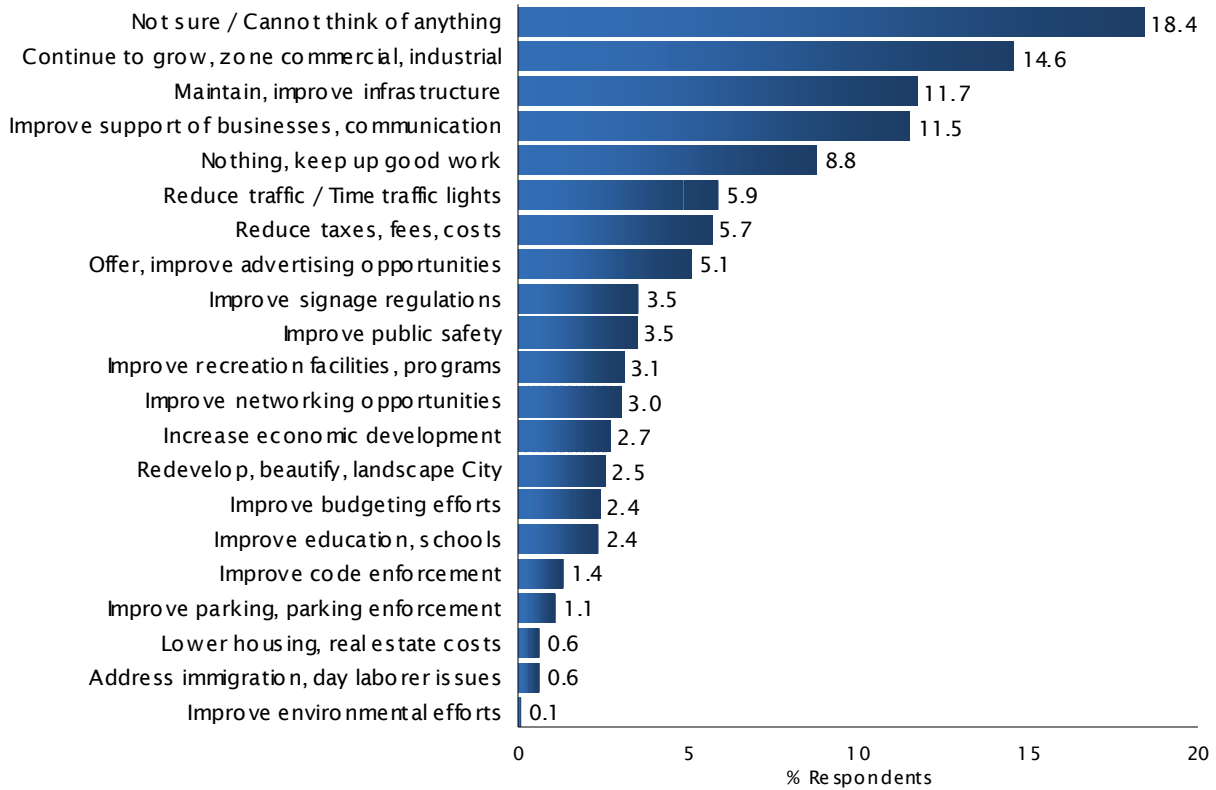


**TABLE 4 WANT FROM LAKE FOREST IN NEXT TWO YEARS: RESIDENT SURVEY (2010 ~ 2004)**

	Study Year			
	2010	2008	2006	2004
Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything
Increased crime prevention, safety	Reduced, improved traffic congestion	Reduced, improved traffic congestion	Reduced, improved traffic congestion	Reduced, improved traffic congestion
Reduced, improved traffic congestion	Increased crime prevention, safety	Increased crime prevention, safety	Completed construction on El Toro Road	Completed construction on El Toro Road
Increased, improved parks, recreation	Keep doing what they are doing	Limited growth	Keep doing what they are doing	Keep doing what they are doing
Keep doing what they are doing	Increased, improved parks, recreation	Road improvements	Road improvements	Road improvements

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

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



**TABLE 5 WANT FROM LAKE FOREST IN NEXT TWO YEARS: BUSINESS SURVEY (2010 ~ 2004)**

Study Year			
2010	2008	2006	2004
Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything
Continue to grow, zone commercial, industrial	Improve support of businesses, communication	Continue to grow, zone commercial, industrial	Reduce traffic / Time traffic lights
Maintain, improve infrastructure	Nothing, keep up good work	Reduce traffic / Time traffic lights	Continue to grow, zone commercial, industrial
Improve support of businesses, communication	Redevelop, beautify, landscape City	Nothing, keep up good work	Improve support of businesses, communication
Nothing, keep up good work	Maintain, improve infrastructure	Improve support of businesses, communication	Redevelop, beautify, landscape City

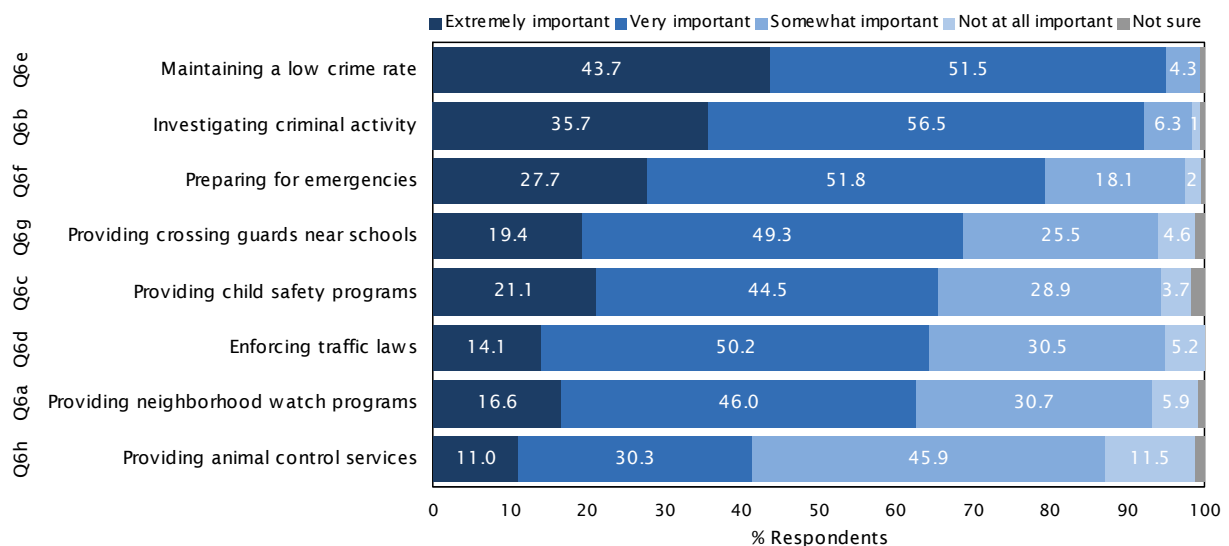
## SPECIFIC SERVICES: RESIDENT SURVEY

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 19 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 (92%), and preparing for emergencies (81%). At the other end of the spectrum, providing animal control services (41%) and providing neighborhood watch programs (63%) were viewed as comparatively less important. Table 6 displays the percentage of respondents who viewed each service as extremely or very important for 2010 and 2008, as well as the difference between the two studies. Just one of the differences was statistically significant (enforcing traffic laws).

**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 19 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY**



**TABLE 6 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY (2010 ~ 2008)**

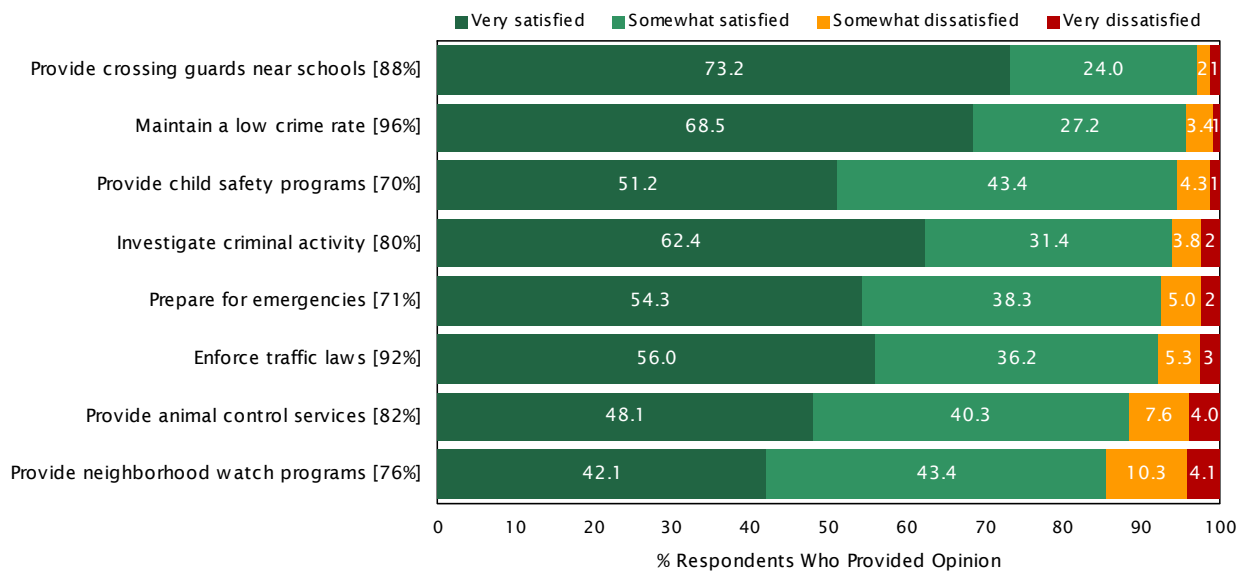
	Study Year		Change in Extremely + Very Important
	2010	2008	
Enforcing traffic laws	64.3	58.1	+6.2†
Providing neighborhood watch programs	62.5	59.1	+3.4
Providing crossing guards near schools	68.7	66.2	+2.5
Investigating criminal activity	92.2	90.2	+2.0
Maintaining a low crime rate	95.1	94.5	+0.6
Preparing for emergencies	79.4	80.8	-1.4
Providing child safety programs	65.6	68.6	-3.0
Providing animal control services	41.3	45.8	-4.5

† Statistically significant change (p < 0.05) between the 2008 and 2010 studies.

Turning to the satisfaction component, Figure 20 sorts the same list of services according to the proportion of respondents who indicated that they were either very or somewhat satisfied with the City’s efforts to provide the service. To allow for an apples-to-apples comparison of the satisfaction ratings, only respondents who held an opinion (either satisfied or dissatisfied) were included in Figure 20. Those who did not have an opinion were removed from this analysis. The percentage who held an opinion for each service is shown to the right of the service label in parentheses. Thus, for example, among the 88% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 73% were very satisfied and 24% were somewhat satisfied. This reporting convention is followed for all departments for the resident and business surveys.

**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 20 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY**



Overall, respondents were most satisfied with the Department’s efforts to provide crossing guards near schools (97%), maintain a low crime rate (96%), and provide child safety programs (95%). Table 7 shows how the 2010 results compared with the prior 2008 study. There were no statistically significant changes during this period.

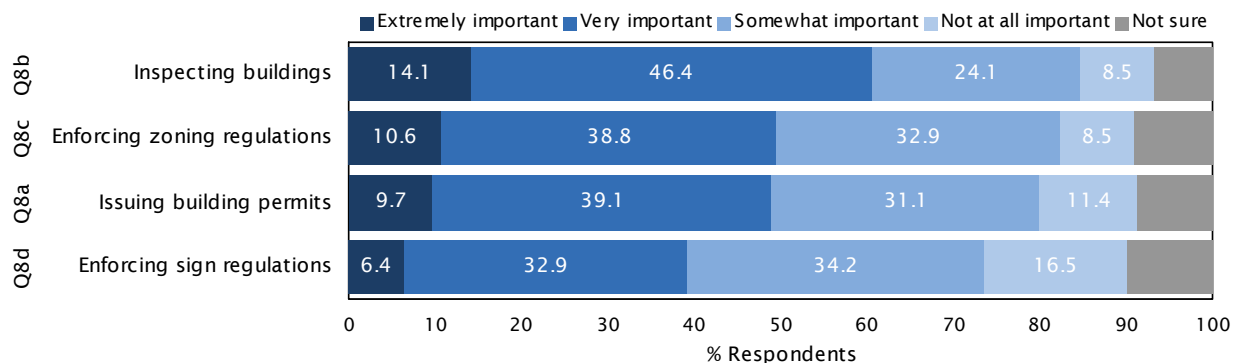
**TABLE 7 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY (2010 ~ 2008)**

	Study Year		Change in Satisfaction
	2010	2008	
Provide animal control services	88.4	84.7	+3.7
Enforce traffic laws	92.1	88.5	+3.6
Maintain a low crime rate	95.7	92.8	+2.9
Investigate criminal activity	93.9	91.3	+2.5
Prepare for emergencies	92.5	90.8	+1.8
Provide child safety programs	94.6	94.1	+0.4
Provide crossing guards near schools	97.1	97.2	-0.0
Provide neighborhood watch programs	85.5	86.8	-1.3

**DEVELOPMENT SERVICES DEPARTMENT** Figure 21 presents the services provided by the Development Services Department in rank order of importance according to the proportion of residents who rated a service as *at least* very important. Overall, residents rated inspecting buildings as the most important service provided by the Department (61%), followed by enforcing zoning regulations (49%), issuing building permits (49%), and enforcing sign regulations (39%). When compared to 2008, there were no statistically significant changes in the perceived importance of the services provided by the Development Services Department (see Table 8).

**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 21 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY**



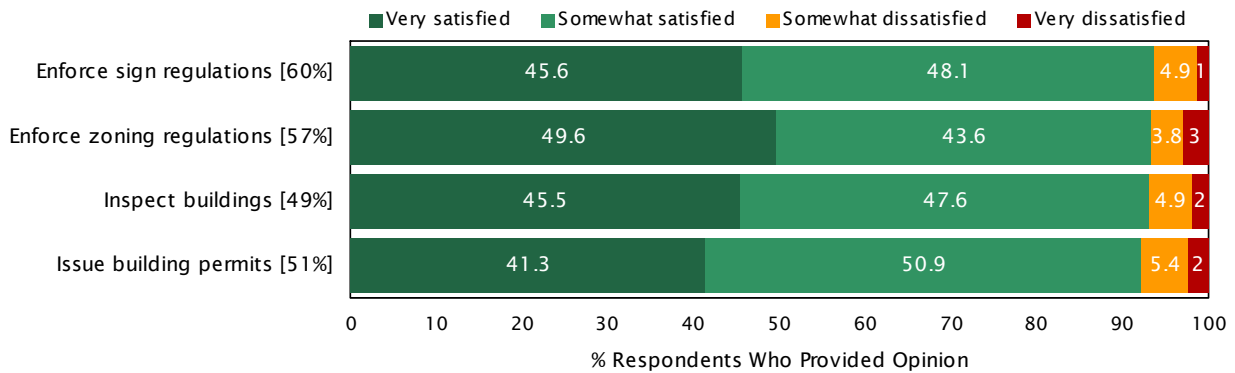
**TABLE 8 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY (2010 ~ 2008)**

	Study Year		Change in Extremely + Very Important
	2010	2008	
Enforcing zoning regulations	49.4	47.5	+1.9
Issuing building permits	48.9	47.2	+1.6
Inspecting buildings	60.6	60.7	-0.2
Enforcing sign regulations	39.3	40.0	-0.7

Figure 22 presents residents' overall satisfaction with the same list of services provided by the Development Services Department. Overall, the ratings assigned to the four services were quite similar, with satisfaction ranging from a low of 92% for issuing building permits to a high of 94% for enforcing sign regulations. When compared to 2008 (see Table 9), residents' satisfaction with the Department's efforts to enforce zoning regulations increased a statistically significant 7%.

**Question 9: Resident Survey** *Are you satisfied or dissatisfied with the City's efforts to: \_\_\_\_\_, or do you not have an opinion?*

**FIGURE 22 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY**



**TABLE 9 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY (2010 ~ 2008)**

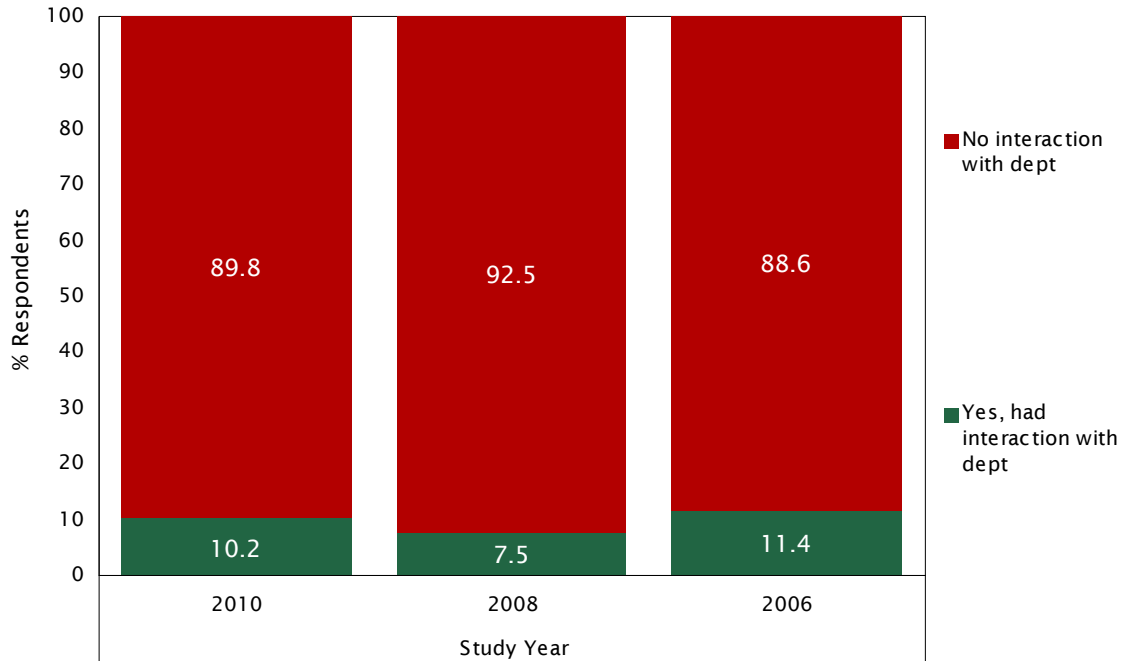
	Study Year		Change in Satisfaction
	2010	2008	
Enforce zoning regulations	93.2	86.1	+7.1†
Enforce sign regulations	93.7	89.4	+4.3
Issue building permits	92.2	90.4	+1.8
Inspect buildings	93.1	91.6	+1.5

† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

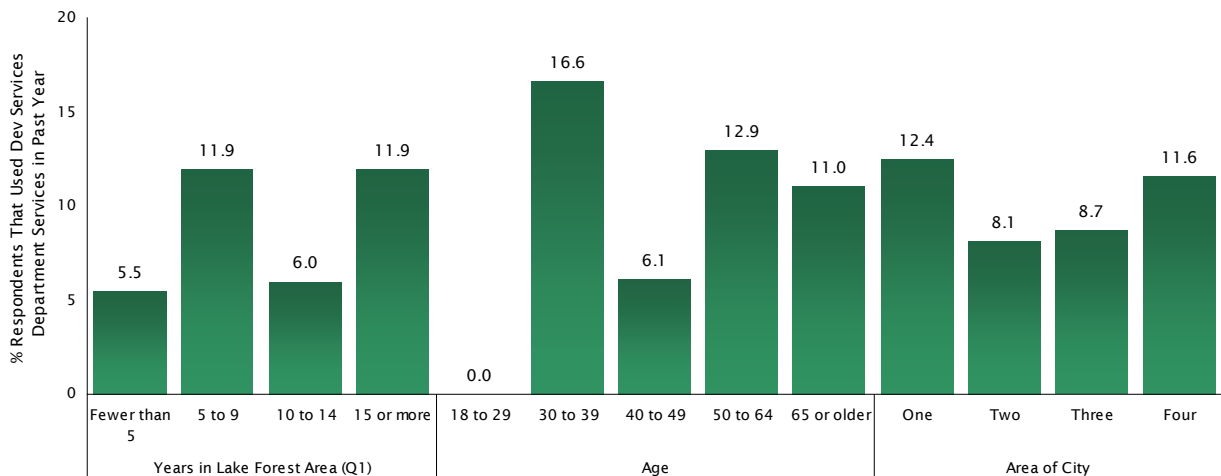
Whereas most departments in the City that directly serve the public primarily interact with residents, customers of the Development Services Department are, for the most part, businesses. One question of interest to the study was whether a respondent had interacted with the Development Services Department during the past year. As shown in Figure 23, just 10% of residents surveyed indicated that they had interacted with the Department during the 12 months prior to the survey in 2010, which is statistically similar to the 8% recorded in 2008. 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 between 5 and 9 years or at least 15 years, those between the ages of 30 and 39, and those who reside in Area One or Area Four (see Figure 24).

**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 23 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY (2010 ~ 2006)**



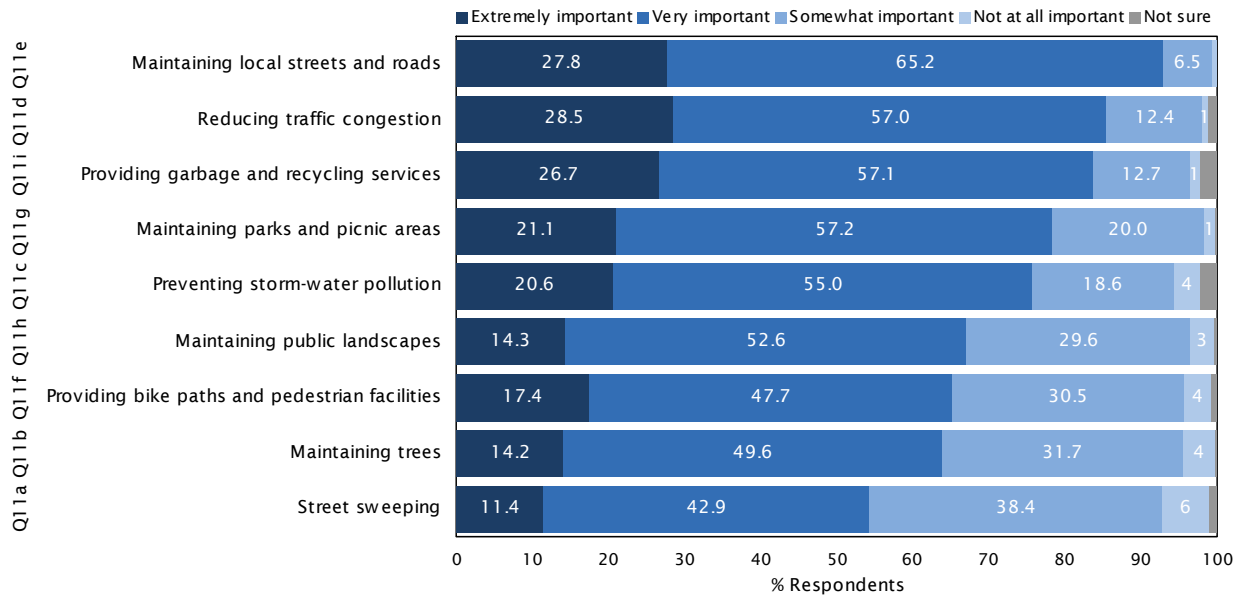
**FIGURE 24 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AGE & AREA OF CITY**



**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 (93%), followed by reducing traffic congestion (86%) and providing garbage and recycling services (84%). When compared to 2008, the importance assigned to preventing stormwater pollution 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 25 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY**



**TABLE 10 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY (2010 ~ 2008)**

	Study Year		Change in Extremely + Very Important
	2010	2008	
Providing bike paths and pedestrian facilities	65.1	62.0	+3.1
Reducing traffic congestion	85.5	83.6	+1.9
Maintaining local streets and roads	93.0	92.0	+1.0
Maintaining parks and picnic areas	78.3	79.2	-0.9
Maintaining public landscapes	66.9	67.9	-0.9
Street sweeping	54.3	55.6	-1.3
Providing garbage and recycling services	83.8	87.1	-3.4
Maintaining trees	63.8	67.4	-3.6
Preventing storm-water pollution	75.6	81.1	-5.5†

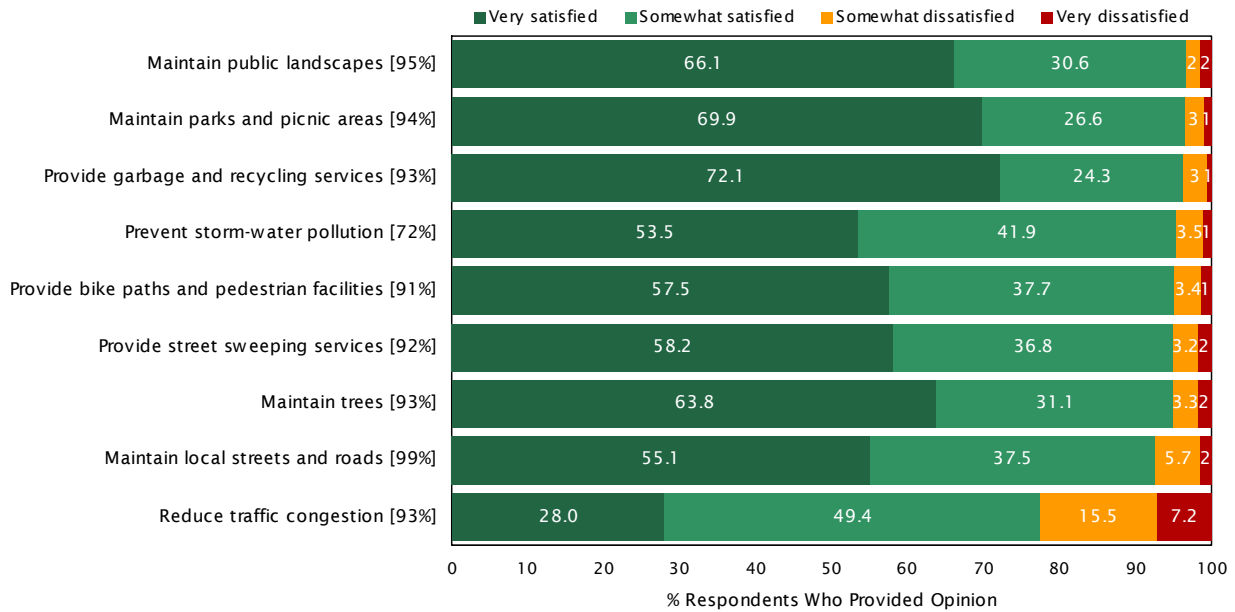
† Statistically significant change (p < 0.05) between the 2008 and 2010 studies.



Figure 26 presents the overall levels of satisfaction with the same list of services provided by the Public Works Department. Residents were most satisfied with the Department’s efforts to maintain public landscapes (97%), maintain parks and picnic areas (97%), and provide garbage and recycling services (96%). When compared to 2008, the levels of satisfaction were statistically higher in 2010 for providing garbage and recycling services (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 26 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY**



**TABLE 11 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY (2010 ~ 2008)**

	Study Year		Change in Satisfaction
	2010	2008	
Provide garbage and recycling services	96.4	91.3	+5.1†
Reduce traffic congestion	77.4	73.1	+4.3
Provide bike paths and pedestrian facilities	95.2	91.9	+3.3
Maintain parks and picnic areas	96.4	93.2	+3.3
Prevent storm-water pollution	95.4	92.4	+3.0
Maintain local streets and roads	92.6	90.9	+1.7
Maintain public landscapes	96.7	95.1	+1.5
Maintain trees	94.9	93.6	+1.3
Provide street sweeping services	95.0	93.9	+1.0

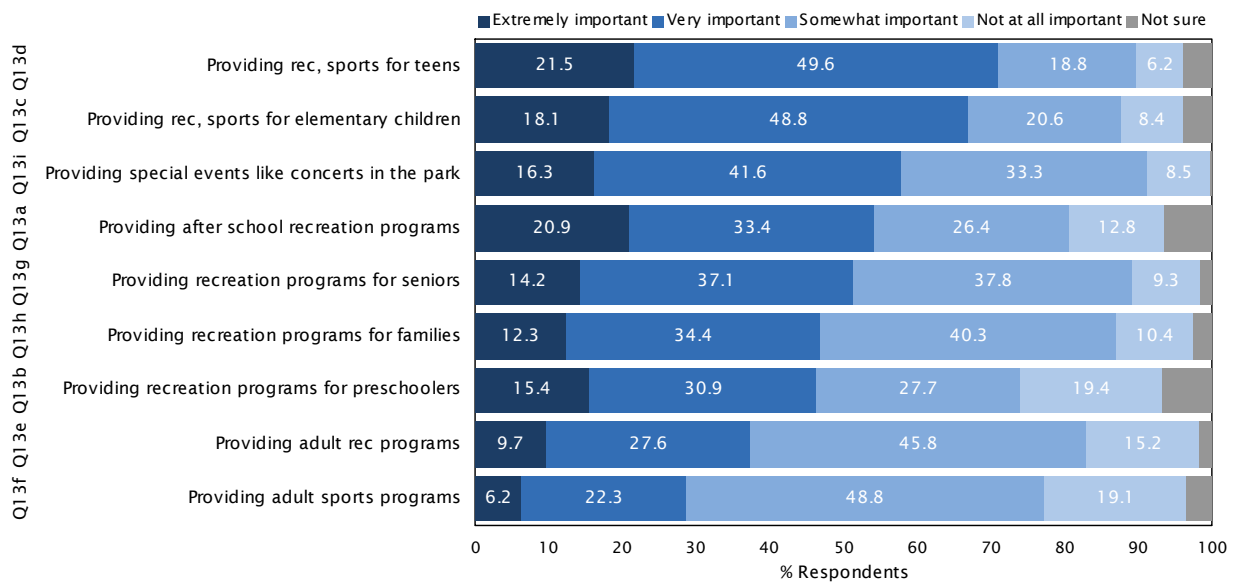
† Statistically significant change (p < 0.05) between the 2008 and 2010 studies.

**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 27 presents each of the services tested, in rank order of importance. Overall, residents assigned the highest importance to providing recreation and sports programs for teens (71%), followed by providing recreation and sports programs for elementary school-aged children (67%), and providing special events

like concerts in the park (58%). At the other end of the spectrum, providing adult sports programs (29%) and adult recreation programs (37%) were viewed as comparatively less important. When compared to 2008, the importance assigned in 2010 to providing recreation and sports programs for elementary school children increased significantly (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 27 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY**



**TABLE 12 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY (2010 ~ 2008)**

	Study Year		Change in Extremely + Very Important
	2010	2008	
Providing rec, sports programs for elementary children	67.0	58.5	+8.5†
Providing special events	57.9	53.2	+4.7
Providing rec, sports programs for teens	71.1	67.3	+3.8
Providing adult sports programs	28.5	24.8	+3.7
Providing recreation programs for pre-schoolers	46.3	44.4	+1.9
Providing adult rec programs	37.3	36.3	+1.0
Providing recreation programs for seniors	51.3	50.4	+0.9
Providing recreation programs for families	46.8	46.4	+0.3
Providing after school recreation programs	54.3	57.0	-2.7

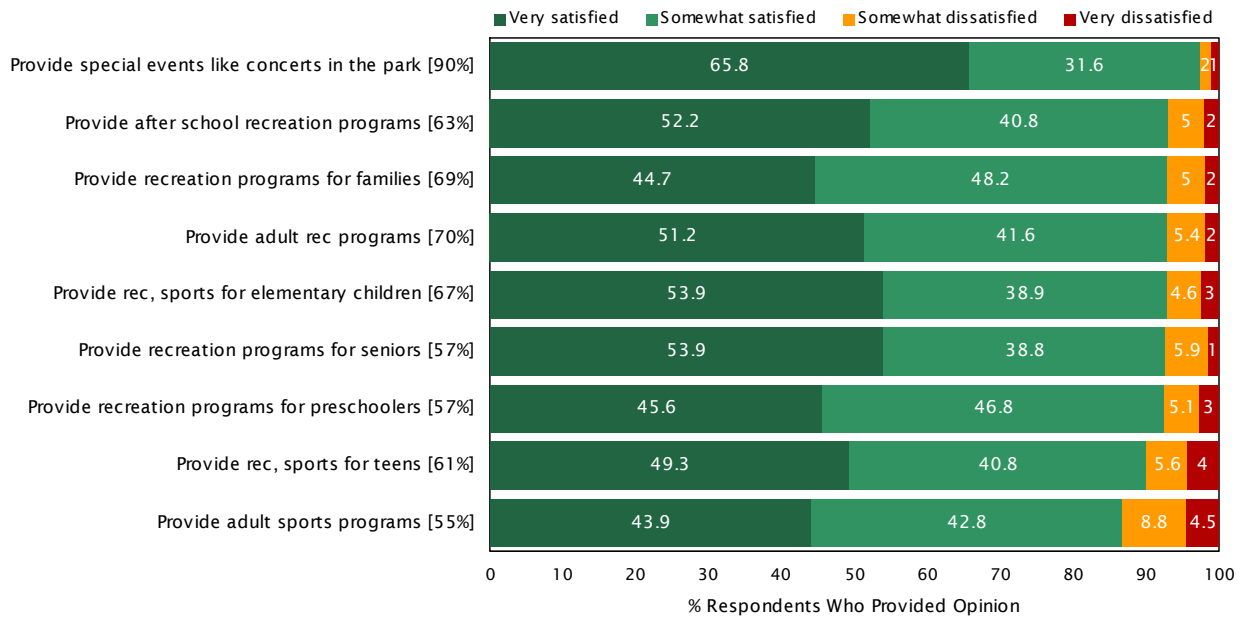
† Statistically significant change (p < 0.05) between the 2008 and 2010 studies.

When asked about their satisfaction with the same list of services (Figure 28), residents indicated that they were quite satisfied with every service tested—which is similar to the patterns found in other departments. Overall, residents expressed the greatest levels of satisfaction with respect to the Department’s efforts to provide special events (97%), followed by after school recreation and sports programs (93%) and recreation programs for families (93%). Residents were somewhat less satisfied with the Department’s efforts to provide adult sports programs (87%) and rec-

recreation and sports programs for teens (90%), although even for these services approximately 9 out of every 10 respondents was satisfied. When compared to the results from 2008, the findings for 2010 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 28 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY**



**TABLE 13 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY (2010 ~ 2008)**

	Study Year		Change in Satisfaction
	2010	2008	
Provide rec, sports programs for elementary children	92.8	88.2	+4.6
Provide recreation programs for families	92.9	89.3	+3.6
Provide after school recreation programs	93.0	89.5	+3.5
Provide adult sports programs	86.7	83.2	+3.5
Provide recreation programs for pre-schoolers	92.4	89.2	+3.2
Provide rec, sports programs for teens	90.1	87.5	+2.6
Provide adult rec programs	92.8	91.4	+1.4
Provide special events	97.4	96.3	+1.1
Provide recreation programs for seniors	92.7	92.0	+0.7

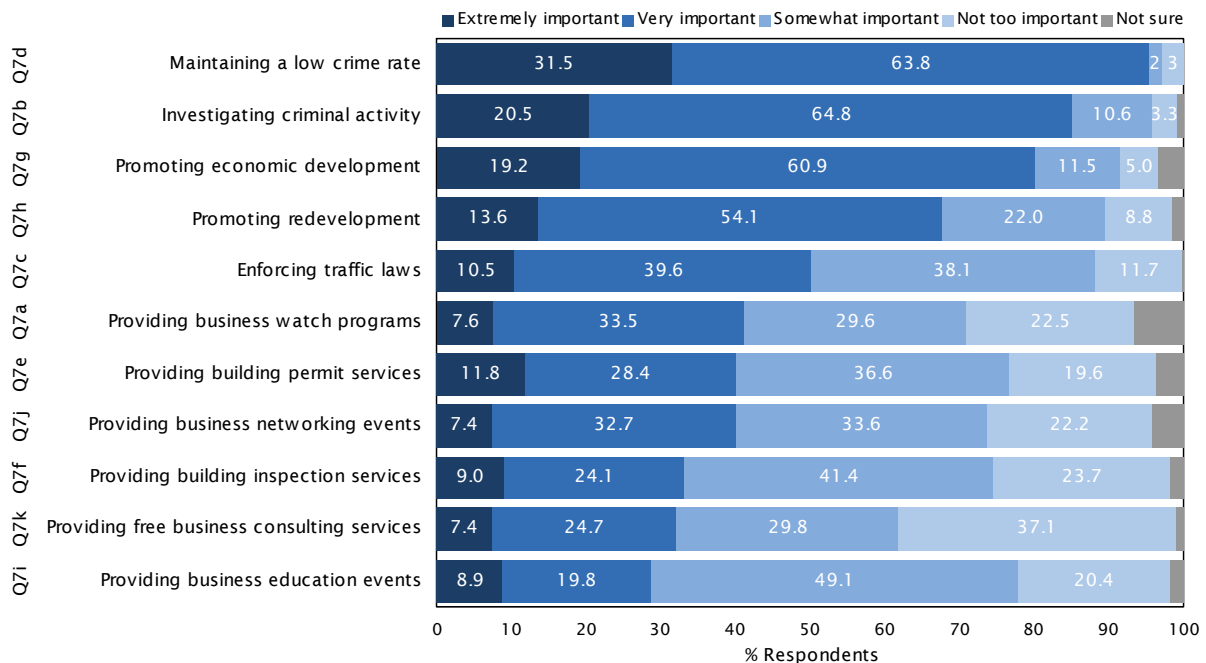
## SPECIFIC SERVICES: BUSINESS SURVEY

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 29 provides the importance ratings assigned to each of the services tested in the first list—which can be loosely categorized as ‘general City services’. Overall, the business community rated maintaining a low crime rate (95%) as the most important of the services tested, followed by investigating criminal activity (85%) and promoting economic development (80%). At the other end of the spectrum, the business community viewed providing business education events (29%), free business consulting services (32%), and building inspection services (33%) as comparatively less important. When compared to the 2008 results, the perceived importance of promoting redevelopment and economic development in Lake Forest increased significantly (see Table 14).

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

**FIGURE 29 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY**



**TABLE 14 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY (2010 ~ 2008)**

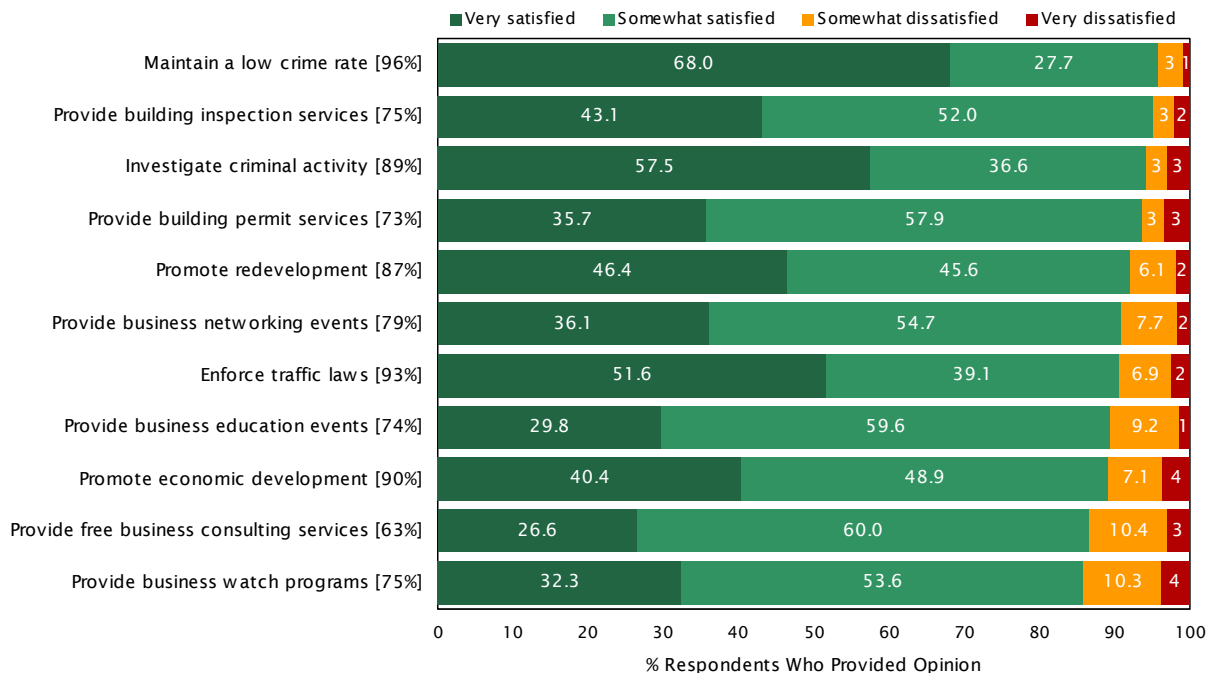
	Study Year		Change in Extremely + Very Important
	2010	2008	
Promoting redevelopment	67.6	46.0	+21.7†
Promoting economic development	80.1	72.5	+7.6†
Providing building inspection services	33.1	28.4	+4.7
Investigating criminal activity	85.2	80.8	+4.4
Providing business networking events	40.1	35.7	+4.4
Maintaining a low crime rate	95.3	91.7	+3.5
Providing free business consulting services	32.1	29.7	+2.4
Providing building permit services	40.1	38.5	+1.7
Providing business education events	28.7	28.6	+0.2
Providing business watch programs	41.2	41.7	-0.5
Enforcing traffic laws	50.1	55.5	-5.4

† Statistically significant change (p < 0.05) between the 2008 and 2010 studies.

When asked about their satisfaction with the same list of services, the business community indicated that they were quite satisfied with every service tested—which is similar to the patterns found in 2008 (see Figure 30 and Table 15). At the top of the satisfaction scale was maintaining a low crime rate (96%), providing building inspection services (95%), and investigating criminal activity (94%). Businesses were slightly less satisfied with the City’s efforts to provide business watch events (86%), free business consulting services (87%), and promote economic development (89%). There were no statistically significant changes in satisfaction between 2008 and 2010 (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 30 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY**



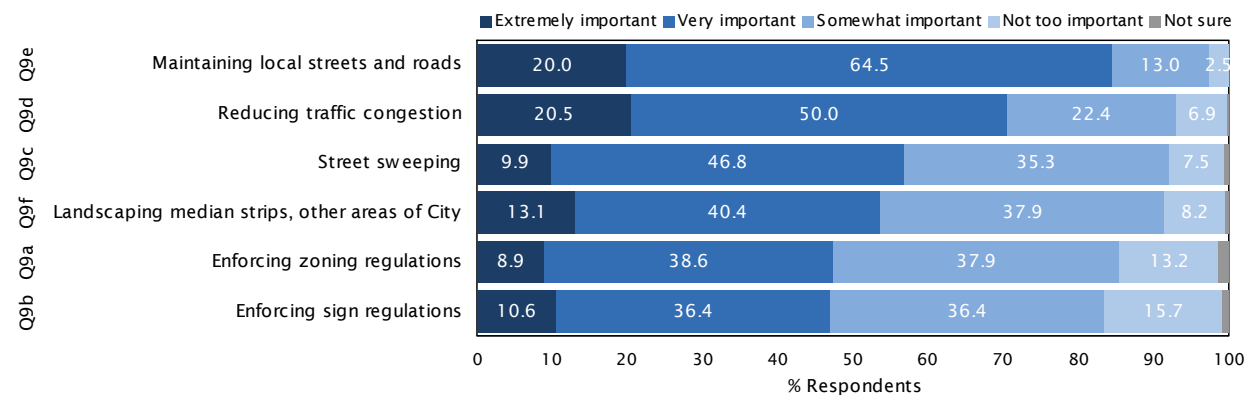
**TABLE 15 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY (2010 ~ 2008)**

	Study Year		Change in Satisfaction
	2010	2008	
Provide business networking events	90.8	85.5	+5.3
Provide building inspection services	95.1	90.5	+4.7
Investigate criminal activity	94.2	90.1	+4.1
Maintain a low crime rate	95.8	92.6	+3.2
Promote economic development	89.3	86.6	+2.7
Provide building permit services	93.7	92.5	+1.2
Provide free business consulting services	86.5	85.7	+0.8
Promote redevelopment	92.0	91.9	+0.1
Provide business education events	89.3	89.6	-0.3
Provide business watch programs	85.9	87.5	-1.6
Enforce traffic laws	90.7	92.8	-2.1

The second list of services, shown in Figure 31, relate mostly to maintaining and improving the City’s infrastructure. When asked to rate the importance that they assign to each of these services, the business community rated maintaining local streets and roads as most important (85%), followed by reducing traffic congestion (71%), and street sweeping (57%). Enforcing sign regulations (47%) and enforcing zoning regulations (48%) were viewed as the least important services among those tested. When compared to the 2008 survey results, the importance of enforcing sign regulations increased significantly (see Table 16).

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

**FIGURE 31 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY**



**TABLE 16 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY (2010 ~ 2008)**

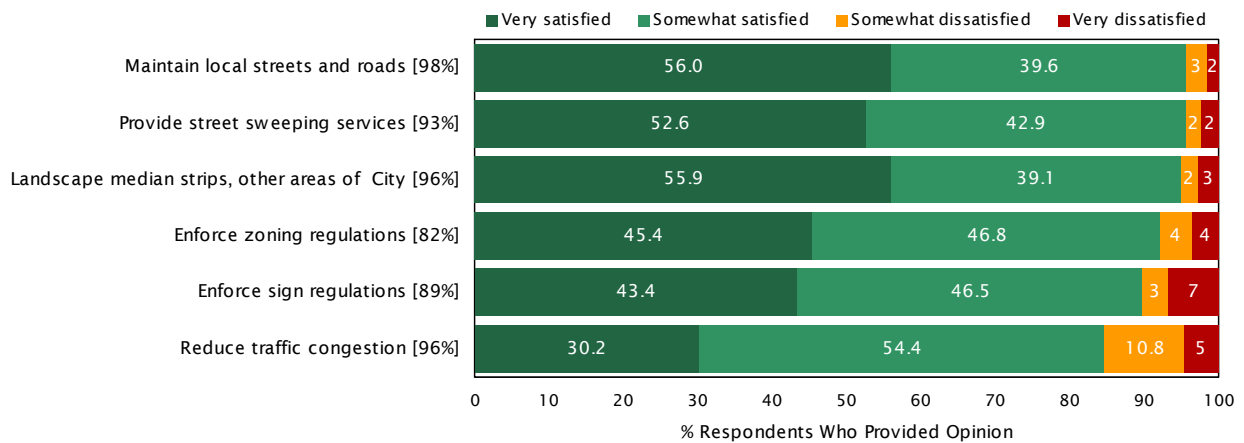
	Study Year		Change in Extremely + Very Important
	2010	2008	
Enforcing sign regulations	47.1	34.6	+12.4†
Enforcing zoning regulations	47.5	41.2	+6.3
Street sweeping	56.7	50.8	+5.9
Landscaping median strips and other areas	53.5	50.8	+2.7
Maintaining local streets and roads	84.5	82.2	+2.2
Reducing traffic congestion	70.6	73.0	-2.4

† Statistically significant change (p < 0.05) between the 2008 and 2010 studies.

Figure 32 presents the overall levels of satisfaction with the same list of infrastructure services. Once again, the satisfaction scores are all quite positive. Overall, satisfaction was greatest with respect to the City’s efforts to maintain local streets and roads (96%), provide street sweeping (96%), and landscape medians and other areas (95%). Only one service—reducing traffic congestion—stood out with somewhat lower levels of overall satisfaction (85%). There were no statistically significant changes in satisfaction with these services between 2008 and 2010 (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 32 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY**



**TABLE 17 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY (2010 ~ 2008)**

	Study Year		Change in Satisfaction
	2010	2008	
Reduce traffic congestion	84.6	81.4	+3.3
Maintain local streets and roads	95.6	94.1	+1.5
Provide street sweeping services	95.6	94.5	+1.1
Enforce zoning regulations	92.2	92.1	+0.1
Enforce sign regulations	89.8	90.6	-0.8
Landscape median strips and other areas	95.0	96.3	-1.3



## PERFORMANCE NEEDS & PRIORITIES

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

Rather than rely on sample *averages* to conduct this analysis, True North has developed and refined an *individualized* approach to identifying priorities that is built on the recognition that opinions will vary from resident to resident (and business to business), and that understanding this variation is required for assessing how well the City is meeting the needs of its constituents.<sup>1</sup> 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.

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1. 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**

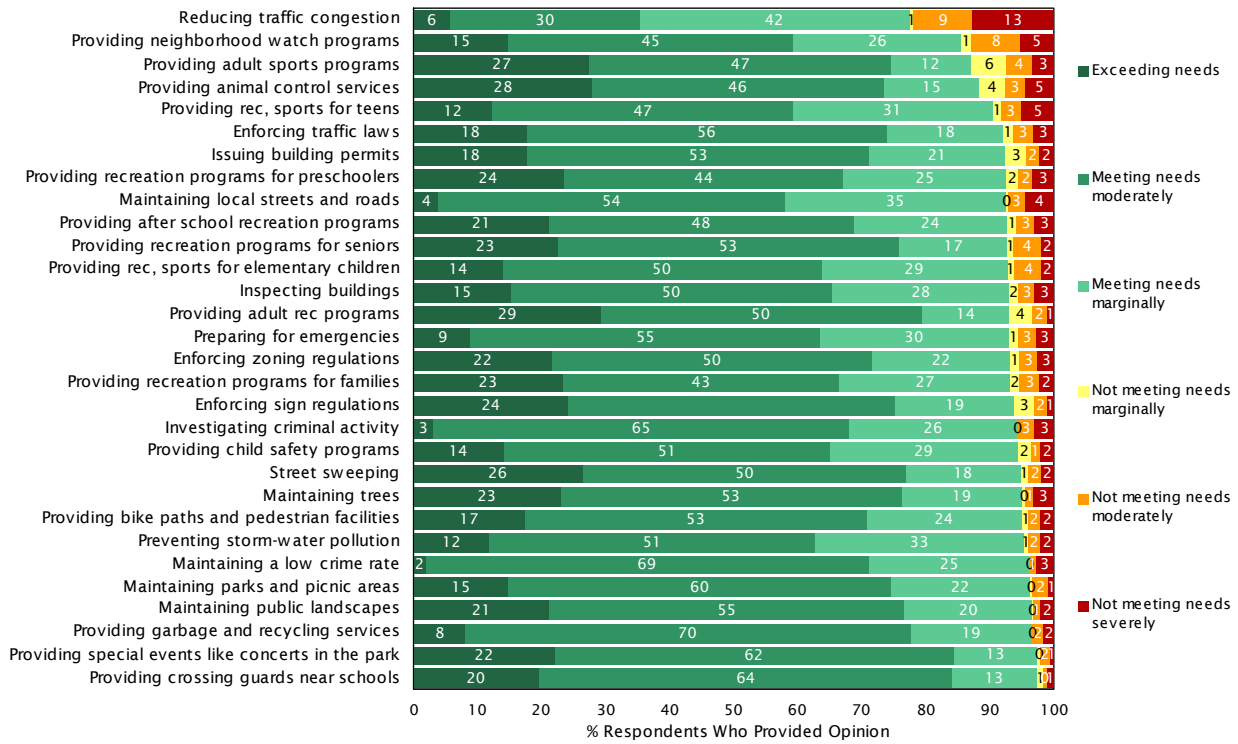
		Importance			
		Not at all important	Somewhat important	Very important	Extremely important
Satisfaction	Very satisfied	Exceeding needs	Exceeding needs	Meeting needs, moderately	Meeting needs, moderately
	Somewhat satisfied	Exceeding needs	Meeting needs, moderately	Meeting needs, marginally	Meeting needs, 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 reducing traffic congestion was somewhat important and they were very satisfied with the City’s efforts in this service area would be categorized in the *exceeding needs* group for this service. The same respondent may be grouped in the *marginally not meeting needs* group for another service—e.g., maintaining local streets and roads—if they were somewhat dissatisfied with the City’s efforts to provide the service, but the service was viewed as only somewhat important.

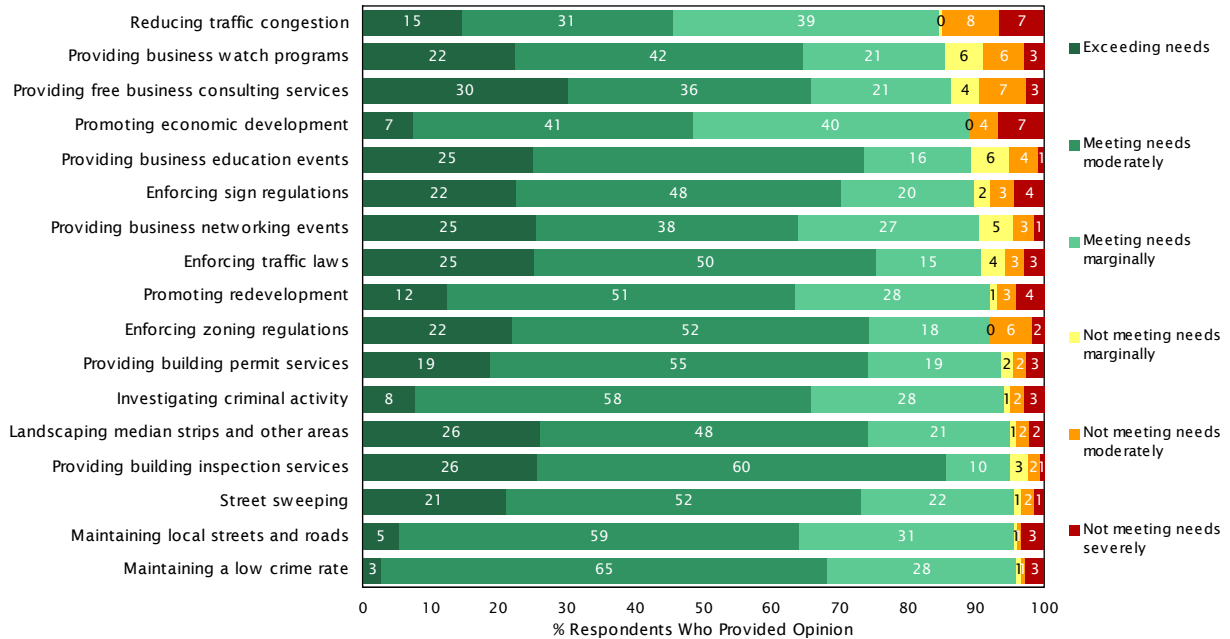
Figure 33 presents each of the 30 services tested with residents, along with the percentage of residents who were grouped into each of the six possible categories. Figure 34 provides the same information for the 17 services tested with the business community. For ease of interpretation, the color-coding 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 6% of residents, moderately meeting the needs of 30% of residents, marginally meeting the needs of 42% of residents, marginally not meeting the needs of 1% of residents, moderately not meeting the needs of 9% of residents, and severely not meeting the needs of 13% 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.

**FIGURE 33 SERVICE NEEDS: RESIDENT SURVEY**



**FIGURE 34 SERVICE NEEDS: BUSINESS SURVEY**



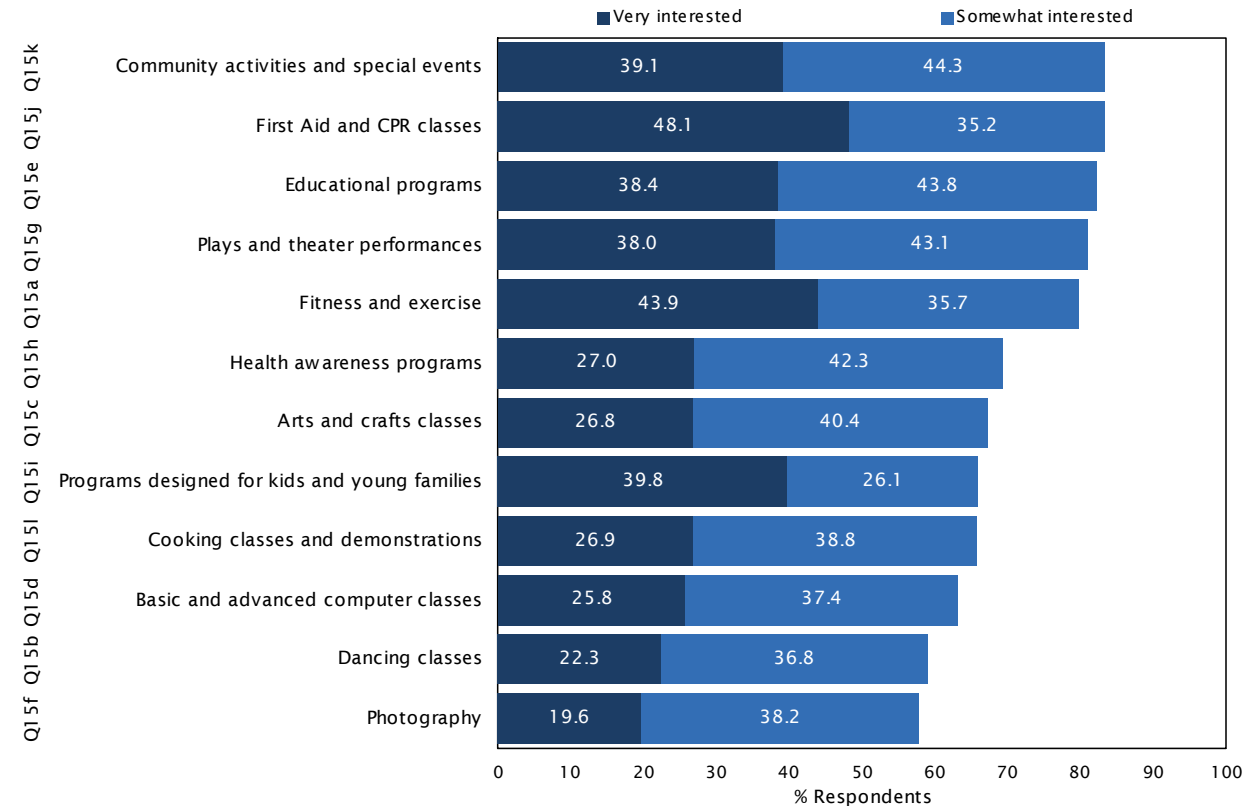
# RECREATION CENTER PROGRAMMING

The City of Lake Forest is in the process of planning a new Recreation Center. Whereas prior surveys focused on the amenities and facilities that could be part of the Center, one of the goals of the 2010 survey was to identify the types of programs and activities residents would be most interested in having offered at the Center.

**ACTIVITIES** For each of the activities listed on the left of Figure 35, residents were asked to indicate whether they or another member of their household would be interested in participating in the activity at the new Recreation Center. Overall, interest was greatest for community activities and special events (83% very or somewhat interested), First Aid and CPR classes (83%), educational programs (82%), plays and theater performances (81%), and fitness and exercise programs (80%). When compared to the other activities tested, interest was somewhat lower for photography (58%), dancing classes (59%), and computer classes (63%).

**Question 15: Resident Survey** *The City of Lake Forest is planning to build a new Recreation Center. The Recreation Center will allow the City to offer a variety of programs and activities to residents. For the following list of activities, please indicate whether you or other members of your household would be very interested, somewhat interested, or not interested in participating in this activity at the new Recreation Center.*

**FIGURE 35 HOUSEHOLD INTEREST IN RECREATION CENTER PROGRAMS AND ACTIVITIES**



Naturally, households may vary somewhat with respect to their recreation interests based on whether there are children in the home, as well as where they are located in the City. The following table shows how the proportion of respondents who were *very* interested in a particular program varied by whether they live with children and the area of the City in which they reside.

**TABLE 19 HOUSEHOLD INTEREST IN RECREATION CENTER PROGRAMS AND ACTIVITIES BY CHILD IN HOME & AREA OF CITY (SHOWING % VERY INTERESTED)**

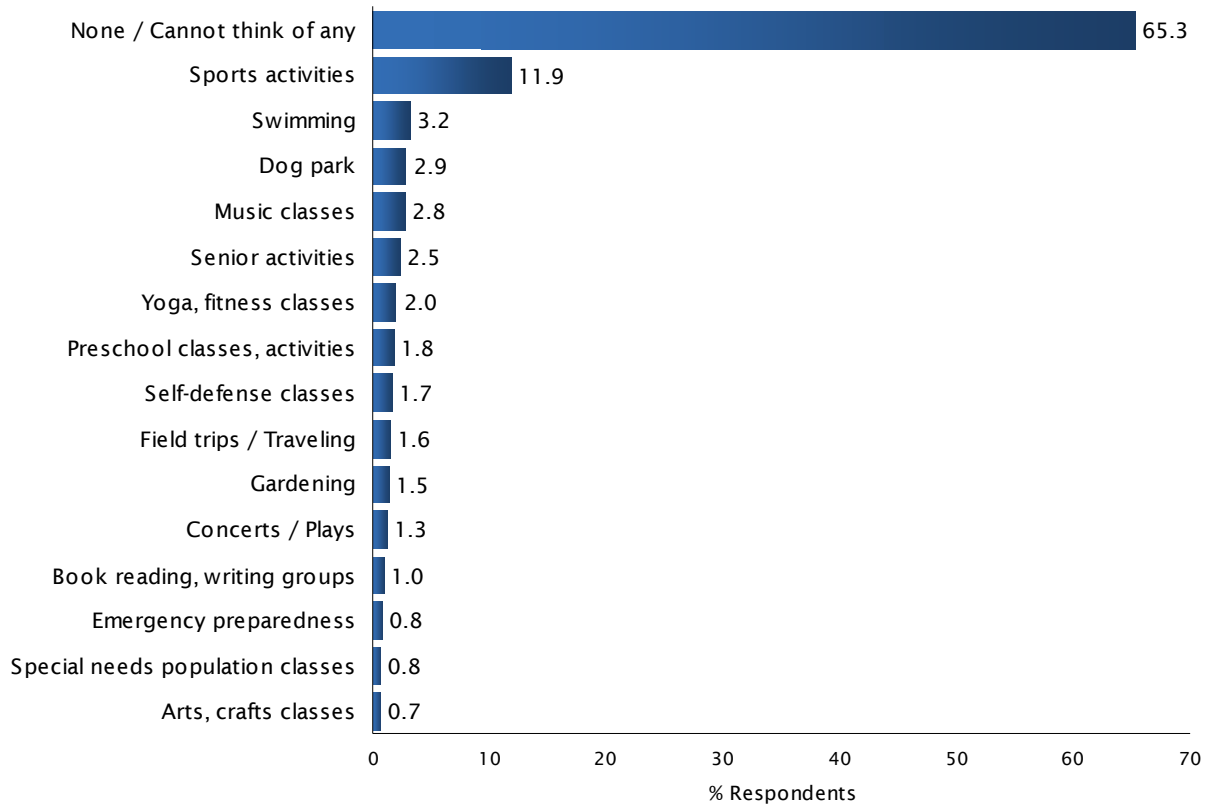
	Child in Home (QD2)		Area of City			
	Yes	No	One	Two	Three	Four
First Aid and CPR classes	52.2	44.5	41.9	46.1	52.0	51.1
Fitness and exercise	44.1	42.8	42.2	43.9	44.6	44.6
Programs designed for kids and young families	59.7	23.3	29.7	40.9	42.1	45.8
Community activities and special events	43.1	35.1	38.8	36.6	43.2	36.1
Educational programs	41.4	35.7	39.2	38.3	37.5	38.8
Plays and theater performances	36.9	37.4	41.5	33.6	39.5	36.6
Health awareness programs	24.2	29.0	25.7	34.7	21.4	28.5
Arts and crafts classes	29.7	24.0	28.4	25.6	22.2	32.4
Cooking classes and demonstrations	26.3	26.6	23.0	26.0	28.9	29.0
Basic and advanced computer classes	20.4	29.0	22.3	28.8	28.9	22.1
Dancing classes	22.4	21.3	20.9	23.0	19.2	27.2
Photography	18.5	19.9	17.5	17.2	22.4	20.4

Recognizing that the list of activities provided in Question 15 does not exhaust the list of possible programs in which Lake Forest residents may have an interest, respondents were also provided an opportunity to suggest additional activities not mentioned in the previous list. Question 16 was asked in an open-ended manner, thereby allowing respondents to mention any activity 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 36 on the next page.

Nearly two-thirds (65%) of respondents indicated that they could not think of an additional activity not already listed that their household would be very interested in participating in at the new Recreation Center. The top three specific responses to Question 16 were sports activities in general (12%), swimming (3%), and a desire for a dog park (3%).

**Question 16: Resident Survey** *Are there any activities not included in the previous list that a member of your household would be very interested in participating in at the new Recreation Center?*

**FIGURE 36 ADDITIONAL PROGRAMS AND ACTIVITIES FOR RECREATION CENTER**



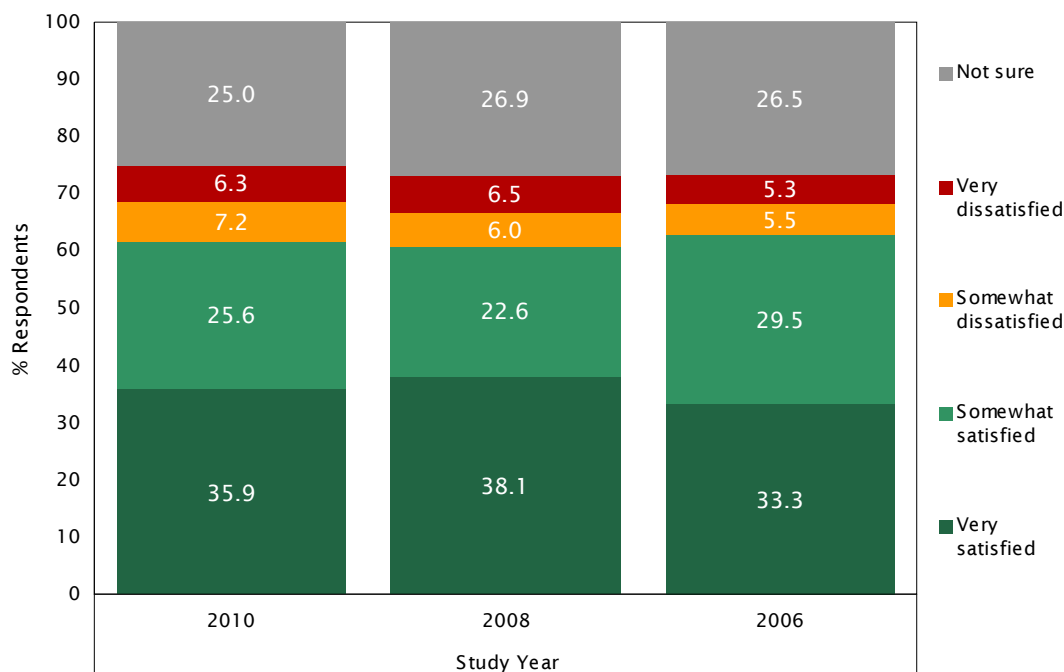
## CODE ENFORCEMENT & NEIGHBORHOOD ISSUES

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. The 2010 survey presented an opportunity to gauge residents' perceptions of code enforcement in Lake Forest, as well as identify what specific issues may be affecting the appearance and overall quality of life in their neighborhoods.

**CODE ENFORCEMENT** Respondents were first 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. 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 17: Resident Survey** *The City of Lake Forest has created codes to address a variety of issues that can affect a neighborhood, such as illegal parking, abandoned vehicles, non-permitted construction, junk storage and properties not being properly maintained. Overall, are you satisfied or dissatisfied with the City's efforts to enforce code violations, or do you not have an opinion?*

**FIGURE 37 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY (2010 ~ 2006)**

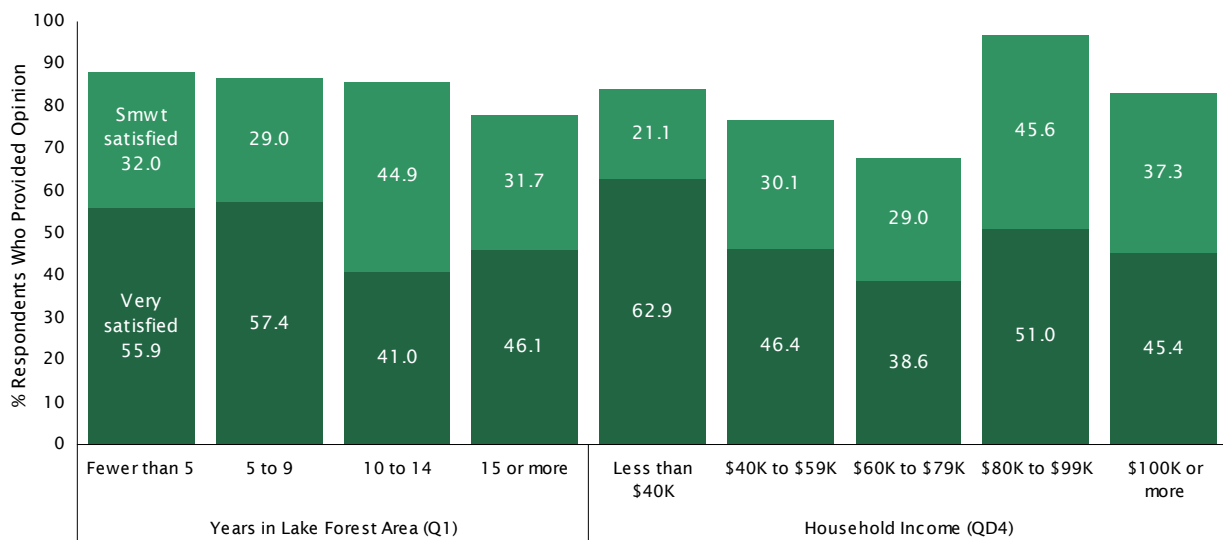


† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

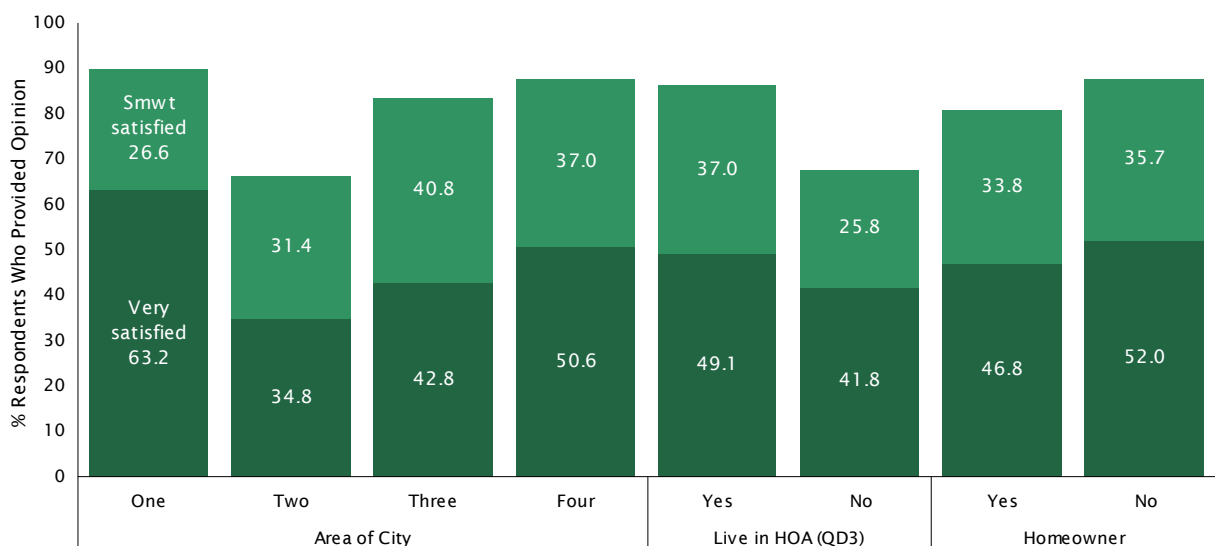
Figure 37 shows that among residents, 25% did not have an opinion regarding the City’s code enforcement efforts. Of those with an opinion, approximately 14% were dissatisfied with City’s efforts in this respect, whereas the remaining respondents were either very (36%) or somewhat (26%) satisfied with the City’s code enforcement efforts. Overall satisfaction with the City’s code enforcement efforts has remained stable since 2006.

For the interested reader, Figures 38 and 39—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 a HOA, and home ownership status.

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



**FIGURE 39 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY BY AREA OF CITY, LIVE IN HOA & HOME OWNER**



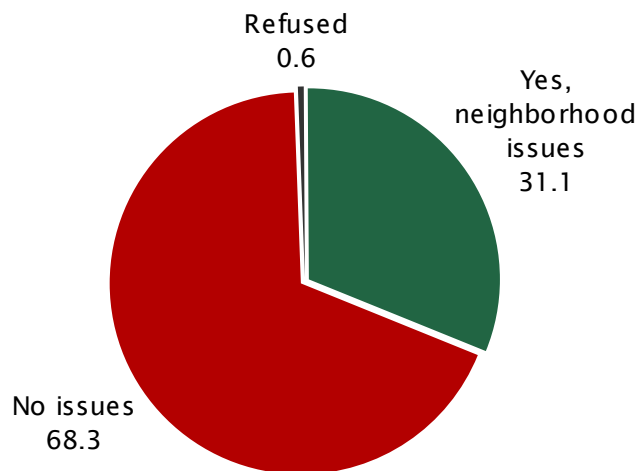
**Question 18: Resident Survey** *Is there a particular issue or code violation that the City isn't addressing that leads you to be dissatisfied?*

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, unkempt houses and yards, too many people per household, and speeding/reckless vehicles.

**NEIGHBORHOOD ISSUES** All residents were next asked whether there are any issues that are having a negative impact on the appearance, safety, or overall quality of life in their neighborhood. As shown in Figure 40, approximately one-third (31%) of respondents indicated that their neighborhood is being negatively affected by one or more issues. When compared to their respective counterparts, residents who do not live in a HOA, earn between \$60,000 and \$79,999 annually, home owners, and those who reside in Area Two of the City were the most likely to report having negative issues affecting their neighborhood (see Figure 41).

**Question 19: Resident Survey** *Thinking of your own neighborhood, are there any issues that are having a negative impact on the appearance, safety, or overall quality of life?*

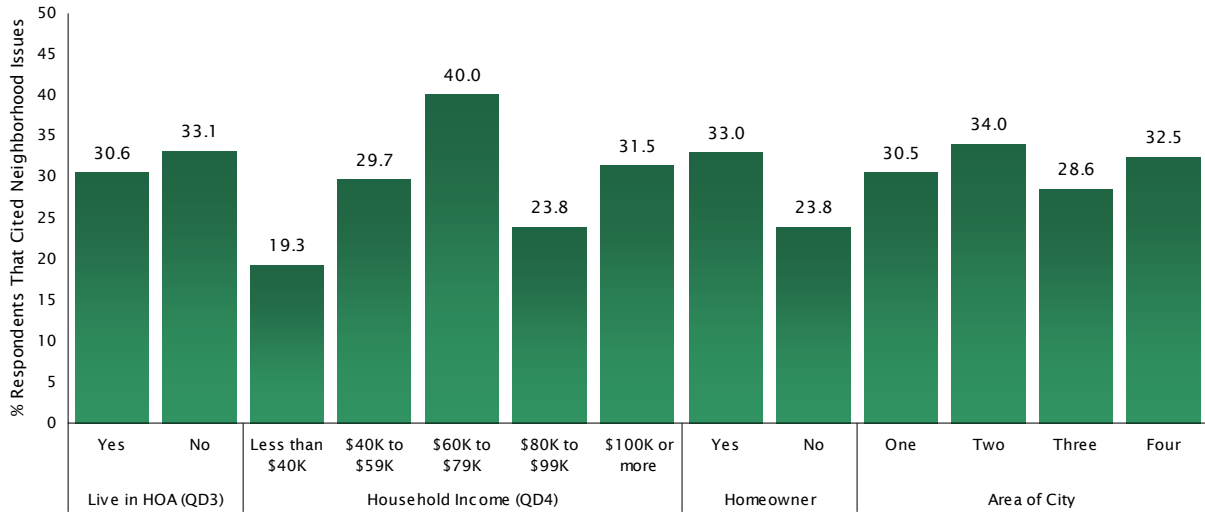
**FIGURE 40 NEIGHBORHOOD ISSUES IMPACTING QUALITY OF LIFE**



When asked to describe the negative issues affecting their community in an open-ended manner (see Figure 42 on the next page), the most commonly mentioned issues were parking related (23%), unkempt properties (15%), landscaping issues (11%), condition of the sidewalks (9%), and drugs (9%).

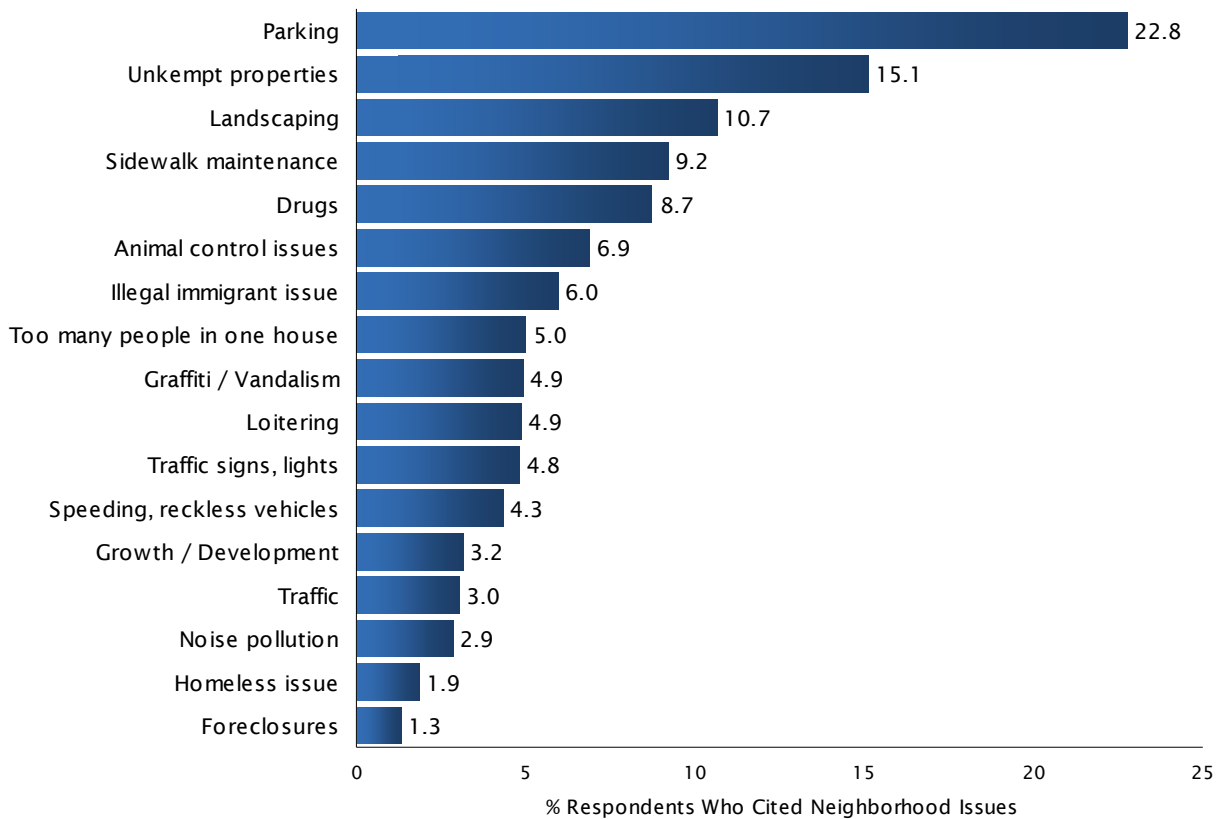


**FIGURE 41 NEIGHBORHOOD ISSUES IMPACTING QUALITY OF LIFE BY LIVE IN HOA, HOUSEHOLD INCOME, HOMEOWNER & AREA OF CITY**



**Question 20: Resident Survey** Please describe the issues [negatively impacting the appearance, safety, or overall quality of life in your neighborhood] to me.

**FIGURE 42 TOP NEIGHBORHOOD ISSUES IMPACTING QUALITY OF LIFE**



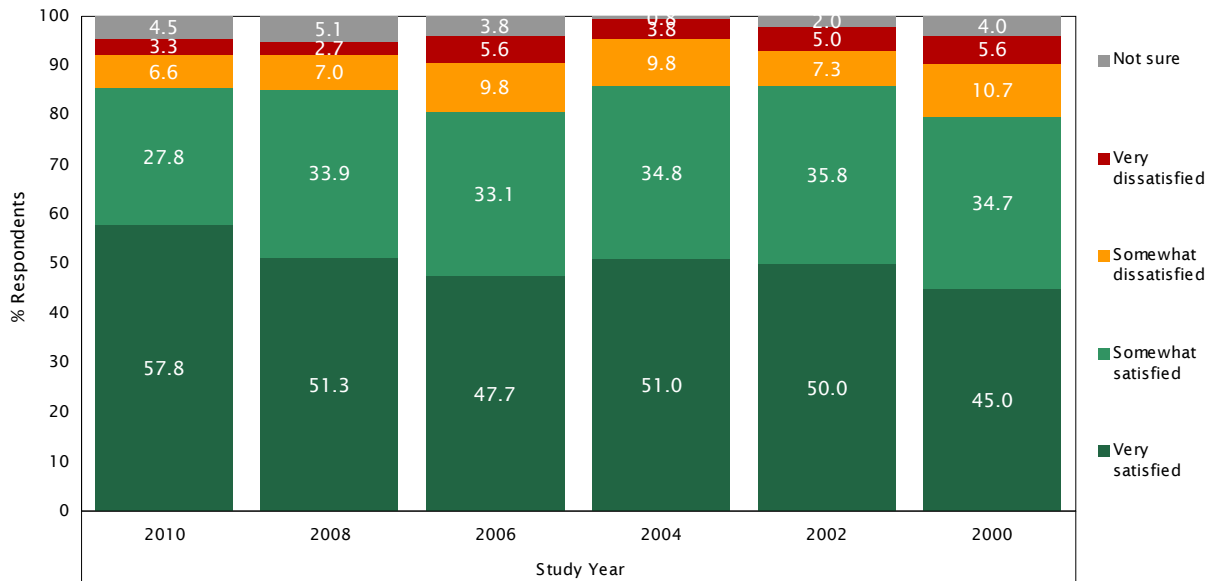
# COMMUNICATION

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, 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, 86% of residents indicated that they were either very (58%) or somewhat (28%) satisfied with the City's communication efforts, which is stronger in intensity than the ratings received in prior surveys (Figure 43). Satisfaction with the City's communication efforts was consistently high among residents regardless of subgroup categorization (see Figures 44 & 45).

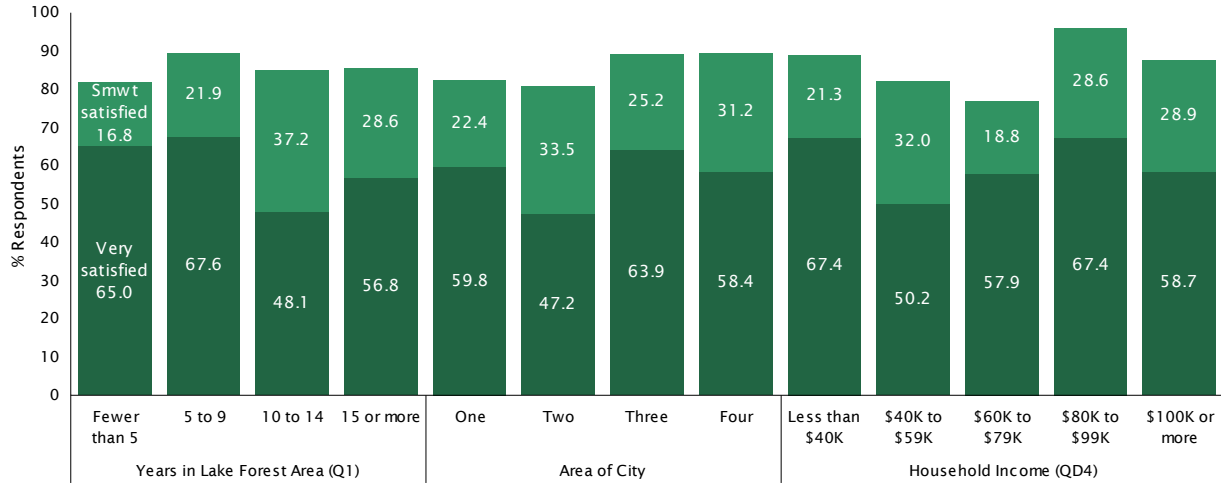
**Question 21: Resident Survey** *Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, and other means?*

**FIGURE 43 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY (2010 ~ 2000)**

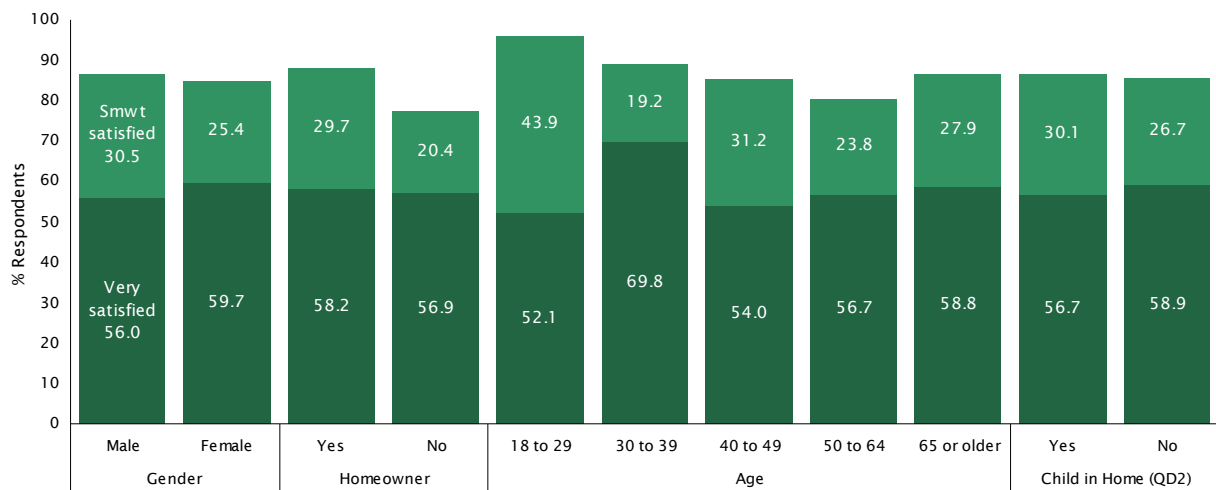


† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

**FIGURE 44 SATISFACTION WITH COMMUNICATION: RESIDENT SATISFACTION BY YEARS IN LAKE FOREST AREA, AREA OF CITY & HOUSEHOLD INCOME**



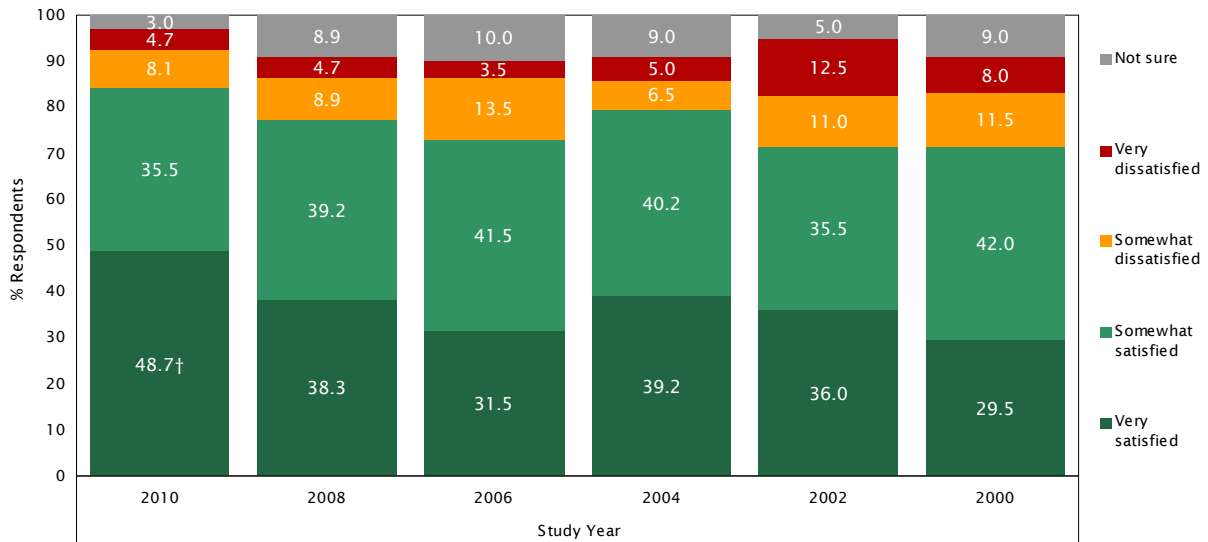
**FIGURE 45 SATISFACTION WITH COMMUNICATION: RESIDENT SATISFACTION BY GENDER, HOME OWNER, AGE & CHILD IN HOME**



Among local businesses, the intensity of satisfaction with the City’s communication efforts was also greater than in prior surveys, with 49% reporting being very satisfied (a statistically significant increase from 2008) and 36% indicating that they were somewhat satisfied. Just 13% of local businesses indicated that they were dissatisfied with the City’s efforts to communicate with them (Figure 46). Figures 47 and 48 show how overall satisfaction varied among key business sub-groups.

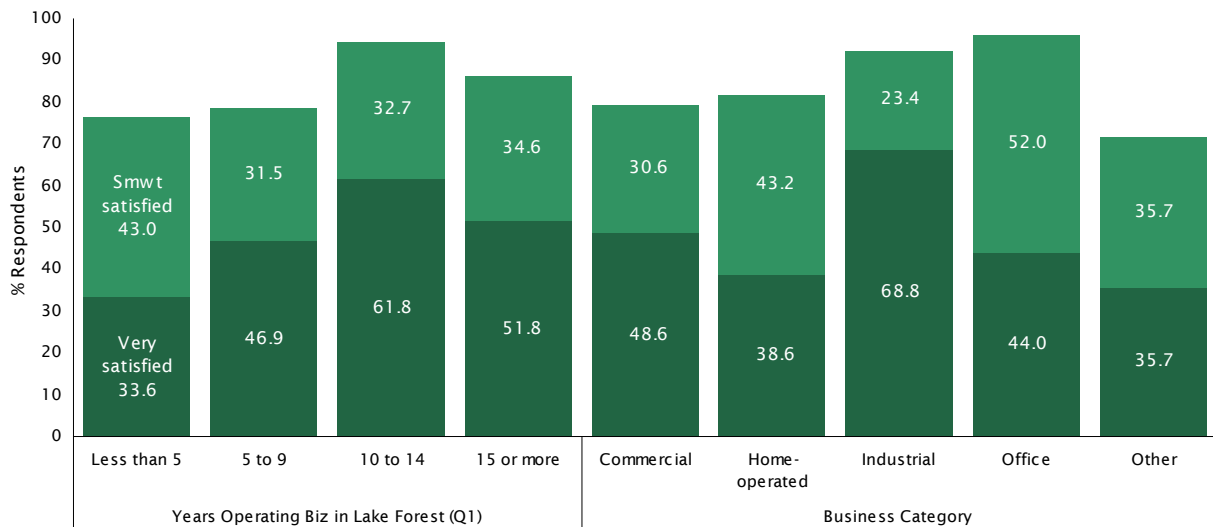
**Question 11: Business Survey** *Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, and other means?*

**FIGURE 46 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY (2010 ~ 2000)**

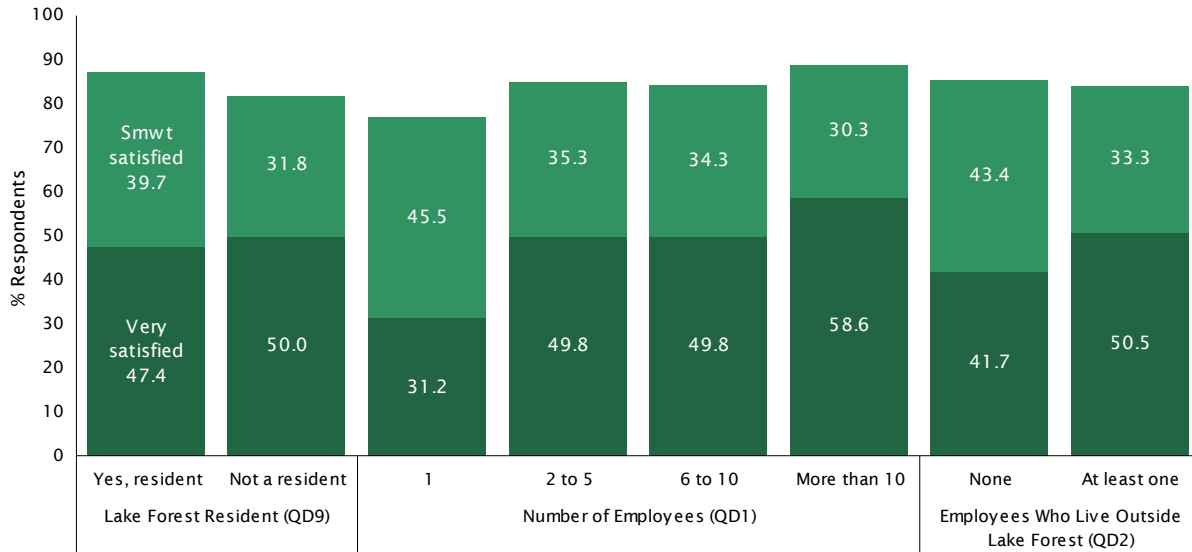


† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

**FIGURE 47 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY**



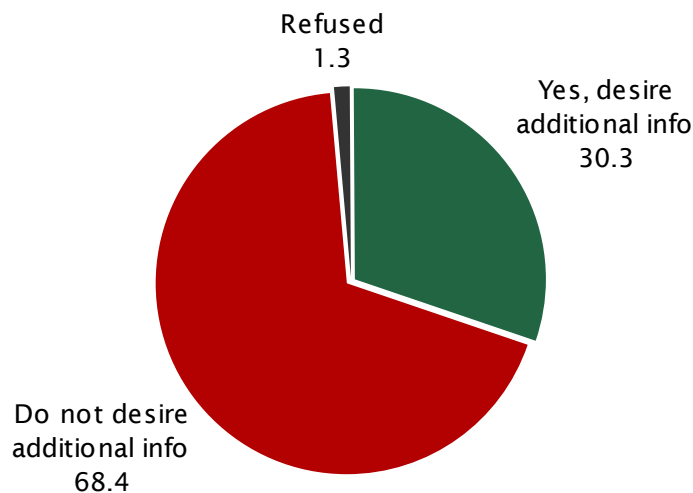
**FIGURE 48 SATISFACTION WITH COMMUNICATION: LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST**



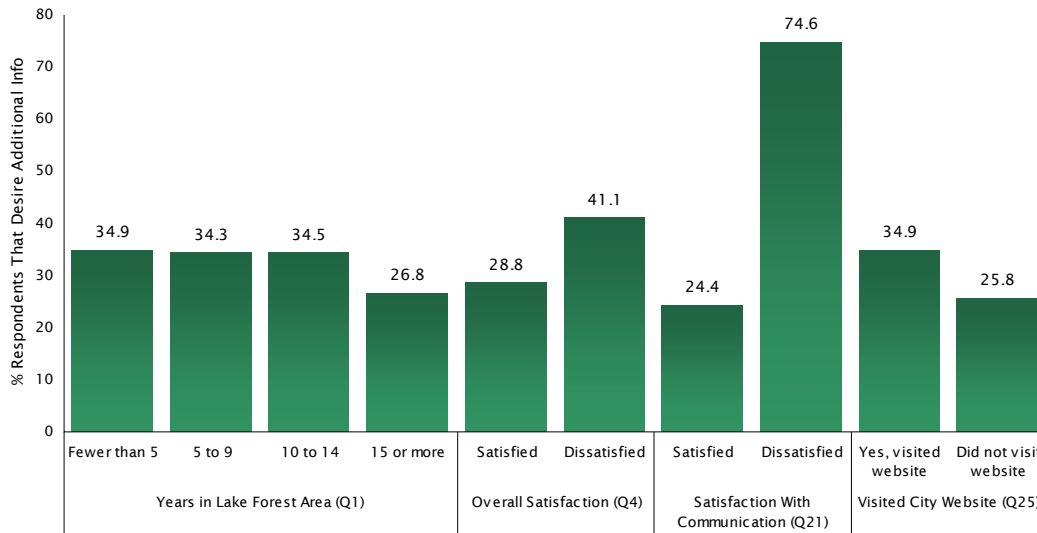
**TOPICS OF INTEREST** Residents were next asked if there was a particular topic or issue that they'd like to receive more information about from the City. Approximately one-third (30%) of residents answered Question 22 in the affirmative (see Figure 49). When compared to their respective counterparts, 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 between 40 and 49 years of age, and those who live in Area Four (see Figures 50 & 51).

**Question 22: Resident Survey** *Is there a particular topic or issue that you'd like to receive more information about from the City?*

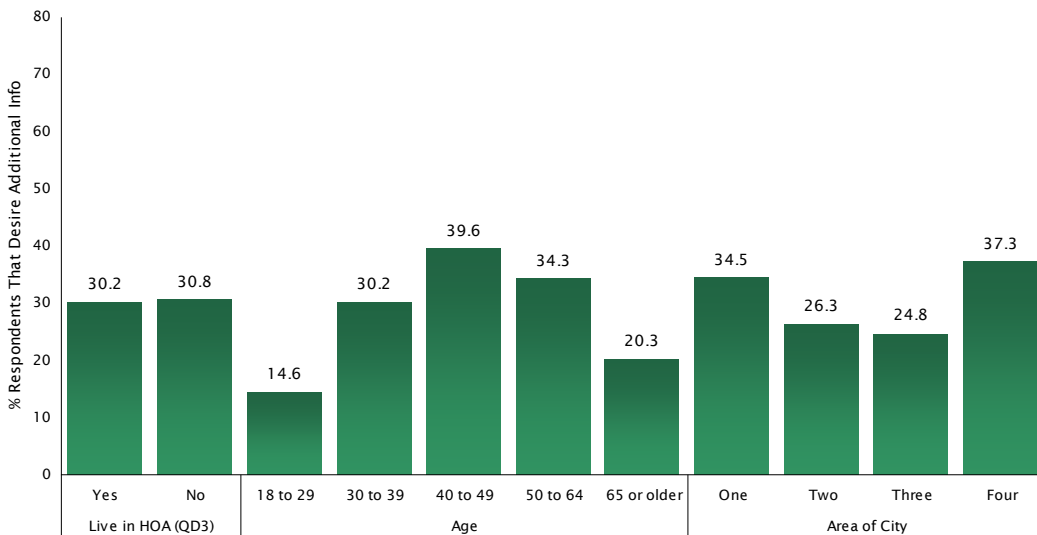
**FIGURE 49 DESIRE ADDITIONAL INFO FROM CITY**



**FIGURE 50 DESIRE ADDITIONAL INFO FROM CITY BY YEARS IN LAKE FOREST AREA, OVERALL SATISFACTION, SATISFACTION WITH COMMUNICATION & VISITED CITY WEBSITE**



**FIGURE 51 DESIRE ADDITIONAL INFO FROM CITY BY LIVE IN HOA, AGE & AREA OF CITY**

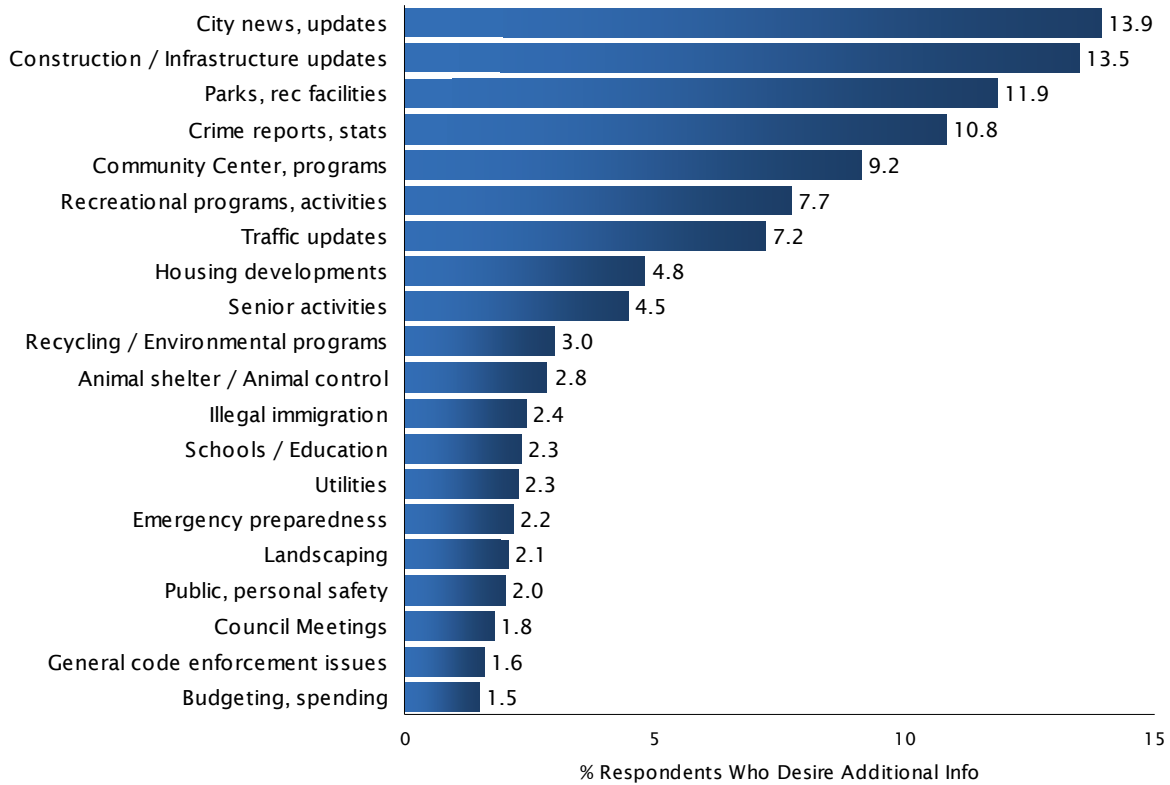


Residents who expressed interest in receiving additional information from the City were subsequently asked to briefly describe the topic in which they were interested. This question (Question 23) was posed in an open-ended manner, meaning that respondents were at liberty to mention any topic that came 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 52. 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.

General requests for news and updates from the City was the most commonly mentioned topic of interest in response to Question 23 (14%), followed by information about construction and infrastructure improvements (14%), parks and recreation facilities (12%), and crimes in the City (11%).

**Question 23: Resident Survey** Please briefly describe the topic [you'd like to receive information about from the City].

**FIGURE 52 ADDITIONAL INFORMATION TOPICS DESIRED**

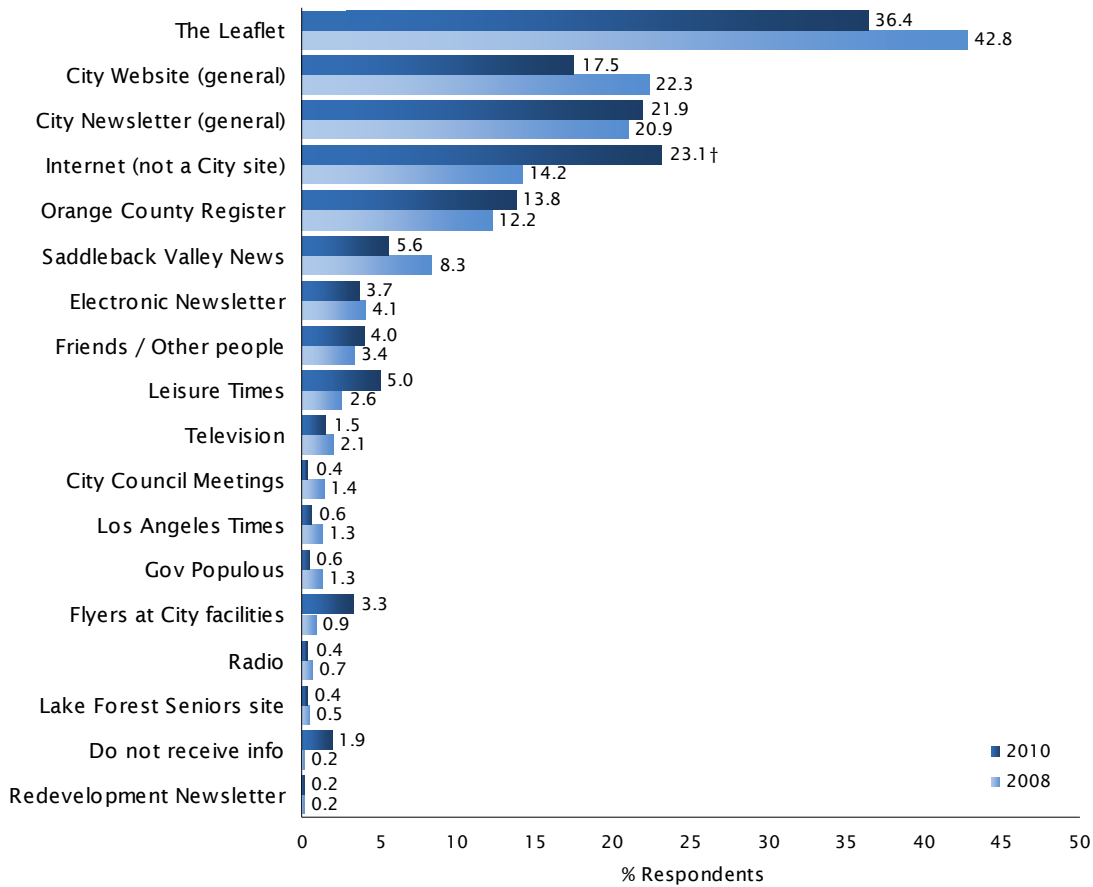


**INFORMATION SOURCES** Residents and businesses were next asked to indicate which information sources they use to find out about City of Lake Forest news, information, and programming. This question was asked in an open-ended format and respondents were allowed to report up to two sources of information. 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 2010 was the City's newsletter, mentioned by name (*The Leaflet*) by 36% of respondents and referred to in general (the City's newsletter) by an additional 22% of residents (Figure 53). Other sources that were mentioned by at least 10% of residents included the City's website (18%), the Internet in general (23%), and the *Orange County Register* (14%). When compared to the 2008 survey results, use of the Internet in general increased significantly. Table 20 on the next page displays the most frequently-cited sources of city-related information according to respondent age, and demonstrates that younger residents are somewhat 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 24: Resident Survey** *What information sources do you use to find out about City of Lake Forest news, information and programming?*

**FIGURE 53 INFORMATION SOURCES: RESIDENT SURVEY (2010 ~ 2008)**



† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

**TABLE 20 TOP INFORMATION SOURCES: RESIDENT SURVEY BY AGE**

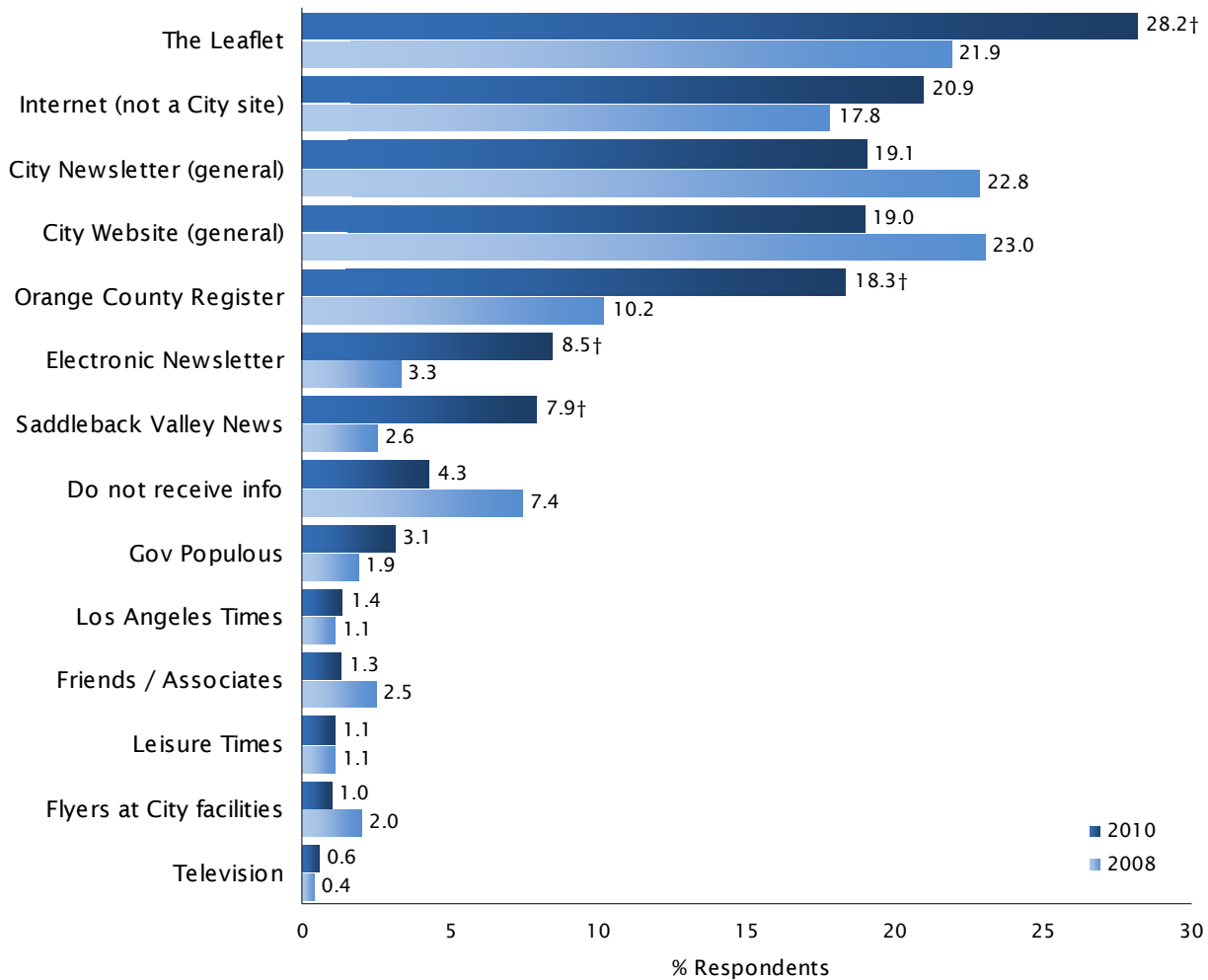
	Age				
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older
Internet (not a City site)	The Leaflet	The Leaflet	The Leaflet	The Leaflet	The Leaflet
The Leaflet	City Website (general)	Internet (not a City site)	City Newsletter (general)	City Newsletter (general)	City Newsletter (general)
City Newsletter (general)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



Members of the business community were most likely to mention the City’s newsletter—generally (19%) and by its name *The Leaflet* (28%)—when asked what information sources they rely on for Lake Forest news, information and programming (Figure 54). Other commonly mentioned sources included the Internet in general (21%), City websites (19%), and the *Orange County Register* (18%). When compared to the 2008 study, the proportion of business professionals who mentioned that they rely on *The Leaflet* increased significantly, as did mentions of the *Orange County Register*, electronic newsletter, and *Saddleback Valley News*.

**Question 12: Business Survey** *What information sources does your business use to find out about City of Lake Forest news, information and programming?*

**FIGURE 54 INFORMATION SOURCES: BUSINESS SURVEY**



† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

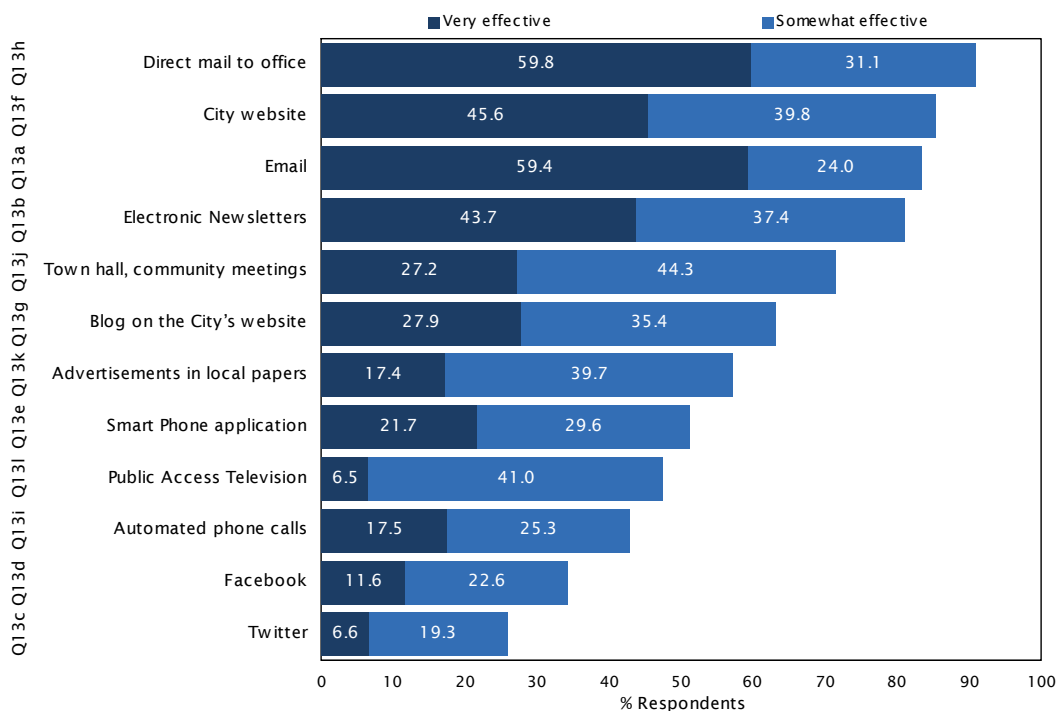
**TABLE 21 INFORMATION SOURCES: BUSINESS SURVEY (2010 ~ 2004)**

	Study Year			
	2010	2008	2006	2004
The Leaflet	City website (general)	Orange County Register	City newsletter (general)	
Internet (not a City site)	City newsletter (general)	The Leaflet	The Leaflet	
City Newsletter (general)	The Leaflet	Internet (not a City site)	Internet (not a City site)	
City Website (general)	Internet (not a City site)	City website (general)	City website (general)	
Orange County Register	Orange County Register	City newsletter (general)	Do not receive info	

**EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS** The next communication-related question presented local businesses with each of the methods shown on the left of Figure 55 and simply asked—for each—whether it would be an effective way for the City to communicate with them. Overall, respondents indicated that direct mail to the office was the most effective method (91% very or somewhat effective), followed by the City’s website (85%), and email (83%). Social media like Twitter (26%) and Facebook (34%) and automated phone calls (43%) were rated as less effective.

**Question 13: Business Survey** *As I read the following ways that the City of Lake Forest can communicate with local businesses, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with your business.*

**FIGURE 55 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS**



For the interested reader, Table 22 displays how the percentage of local businesses that rated each method of communication as *very* effective differed by business category and overall satisfaction with the City’s communication efforts.

**TABLE 22 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS BY BUSINESS CATEGORY & SATISFACTION WITH COMMUNICATION**

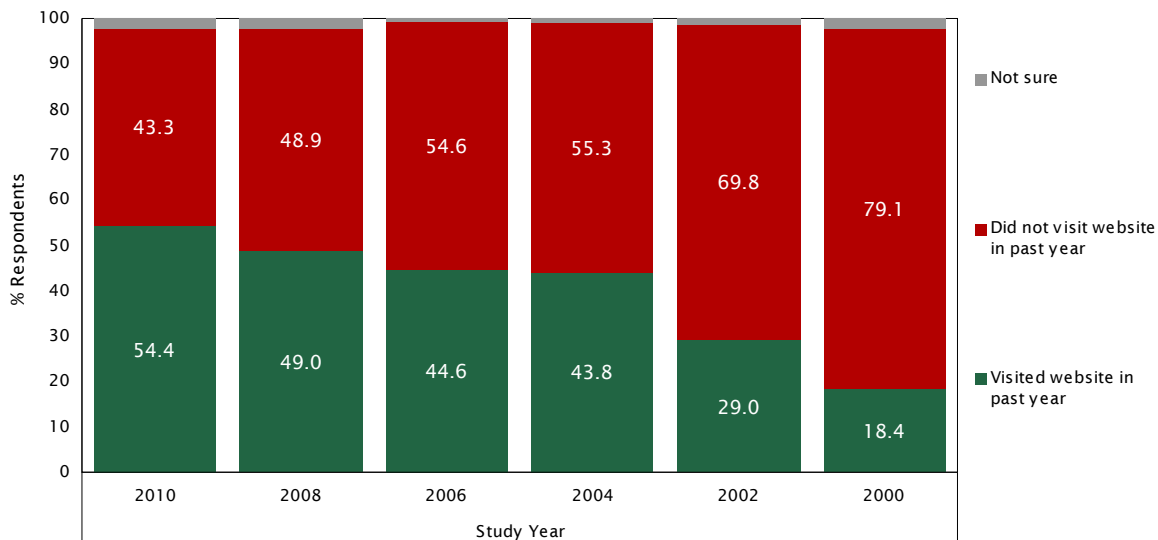
	Business Category					Satisfaction With Communication (Q22)	
	Commercial	Home-operated	Industrial	Office	Other	Satisfied	Dissatisfied
Email	47.7	72.7	77.4	40.0	57.1	60.0	66.8
Direct mail to office	68.6	63.6	37.5	60.0	50.0	58.0	74.7
Electronic Newsletters	45.6	52.3	36.1	28.0	57.1	43.6	47.8
City website	47.0	52.3	39.8	36.0	42.9	48.9	28.9
Blog on the City’s website	32.5	34.1	21.0	12.0	21.4	28.1	29.8
Town hall, community meetings	31.3	29.5	15.7	28.0	21.4	29.1	18.1
Smart Phone application	26.8	25.0	10.6	12.0	35.7	20.9	32.0
Advertisements in local papers	24.2	15.9	8.3	16.0	7.1	16.5	19.8
Automated phone calls	13.7	29.5	13.2	12.0	7.1	18.9	12.8
Facebook	16.4	13.6	5.3	0.0	21.4	9.3	22.7
Twitter	10.2	6.8	2.3	0.0	14.3	6.8	7.1
Public Access Television	7.7	9.1	4.8	0.0	7.1	6.8	6.5

**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.

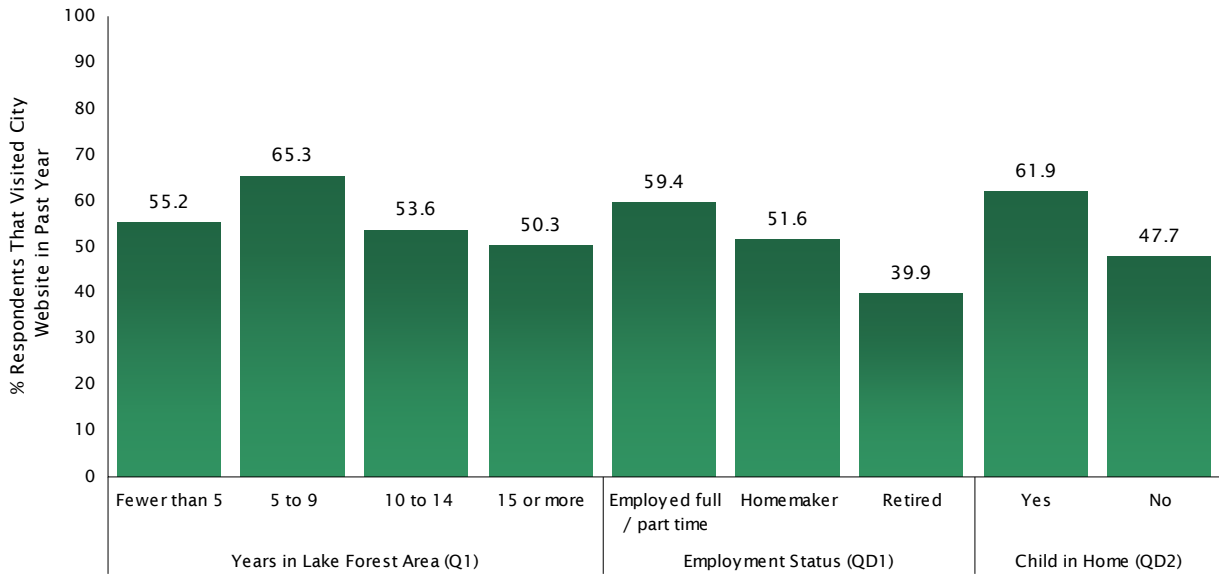
Figure 56 shows that, among residents, the proportion who had visited the City’s website has grown substantially over time. Whereas just 18% of residents reported visiting the City’s websites in 2000, that figure has grown steadily to 54% in 2010. Figures 57 and 58 on the next page show how use of the City’s websites in the past year varied by key resident subgroups.

**Question 25: Resident Survey** *In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?*

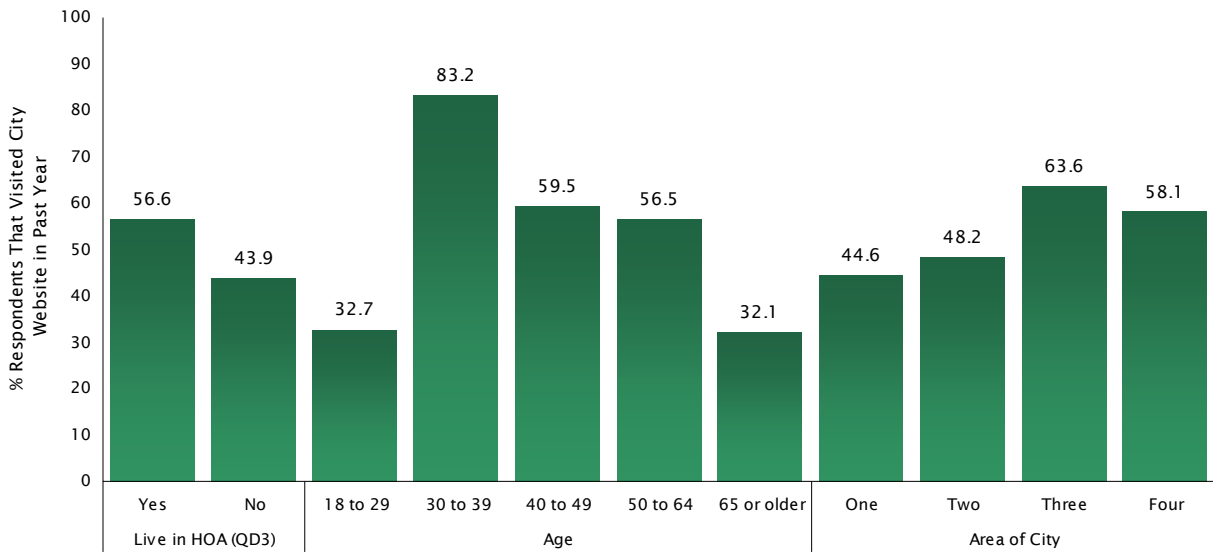
**FIGURE 56 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY (2010 ~ 2000)**



**FIGURE 57 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, EMPLOYMENT STATUS & CHILD IN HOME**



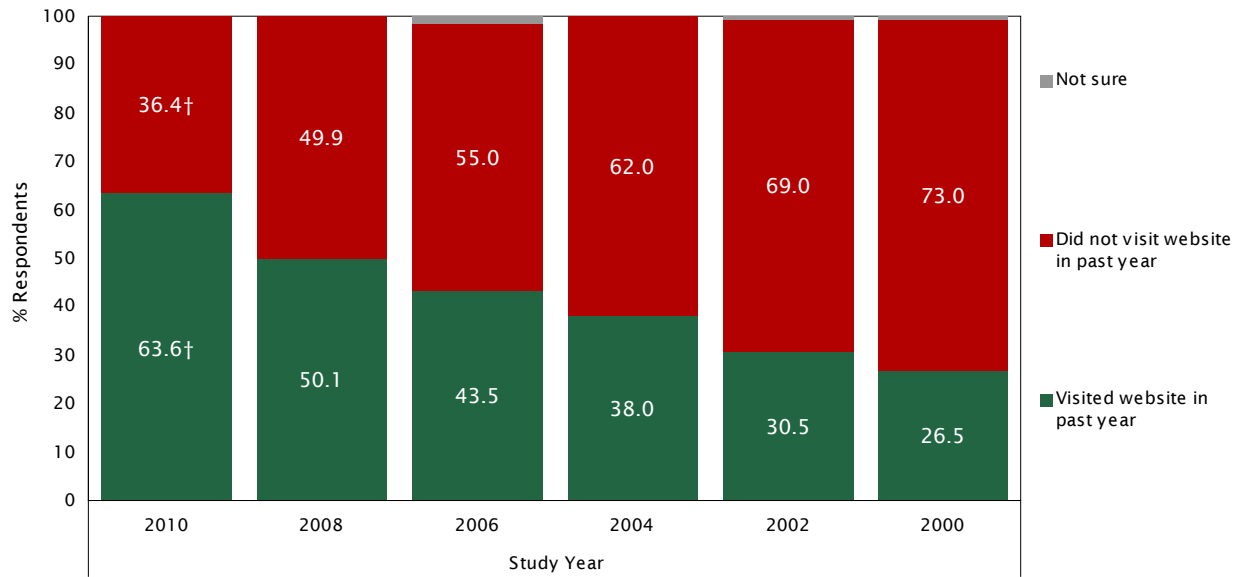
**FIGURE 58 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY LIVE IN HOA, AGE & AREA OF CITY**



The proportion of businesses that had visited the City’s websites in the year prior to the interview was higher than that found among residents (see Figure 59)—and it, too, has grown steadily over the past 10 years. Overall, nearly two-thirds (64%) of businesses indicated that they had visited the City’s websites during this period in 2010. Figure 60 shows how use of the City’s websites varied among key business subgroups.

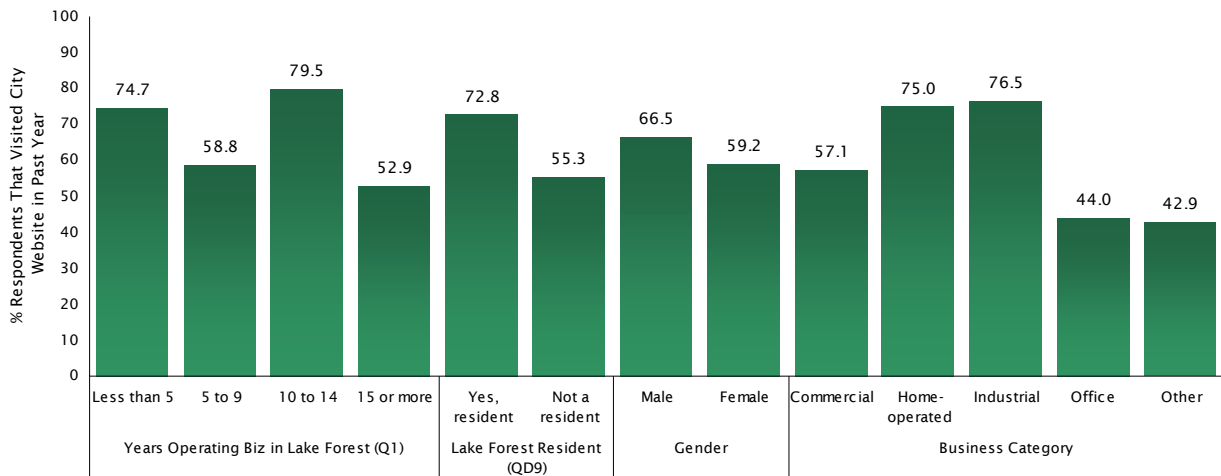
**Question 14: Business Survey** *In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?*

**FIGURE 59 VISITED CITY WEBSITE IN PAST YEAR: BUSINESS SURVEY (2010 ~ 2000)**



† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

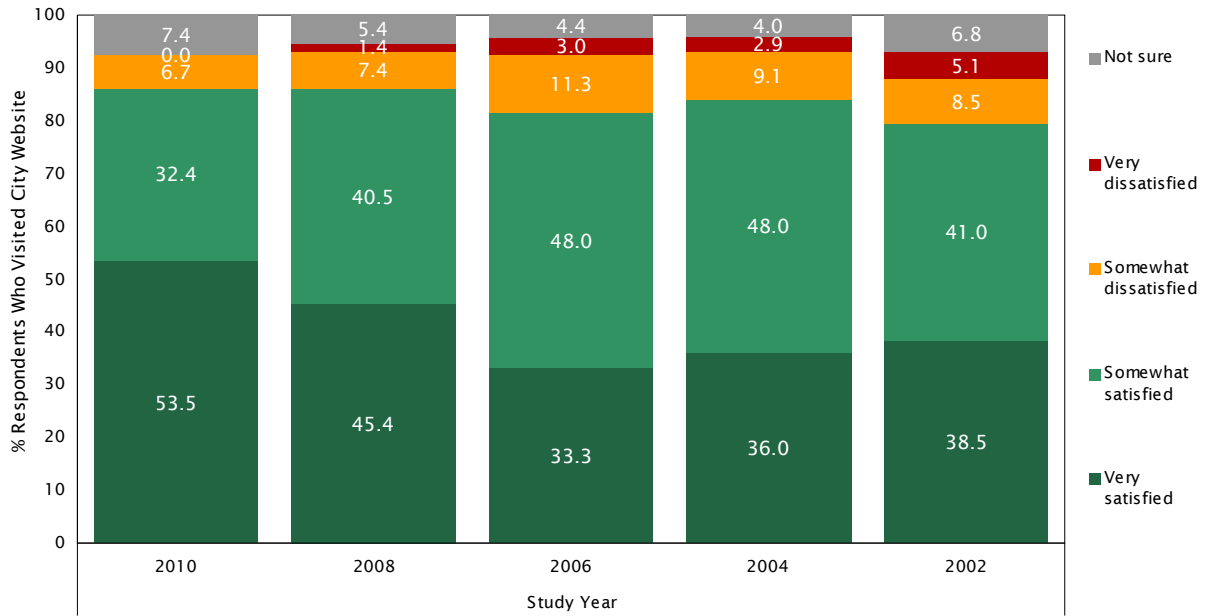
**FIGURE 60 VISITED CITY WEBSITE IN PAST YEAR: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST, LAKE FOREST RESIDENT, GENDER & BUSINESS CATEGORY**



**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 61 for residents and Figure 62 for local businesses. Overall, visitors expressed high levels of satisfaction with the City’s websites, with 86% of residents and 91% of businesses indicating that they were satisfied with the resources available on the sites. An 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 63).

**Question 26: Resident Survey** Are you satisfied or dissatisfied with the resources and content available on the City's web sites?

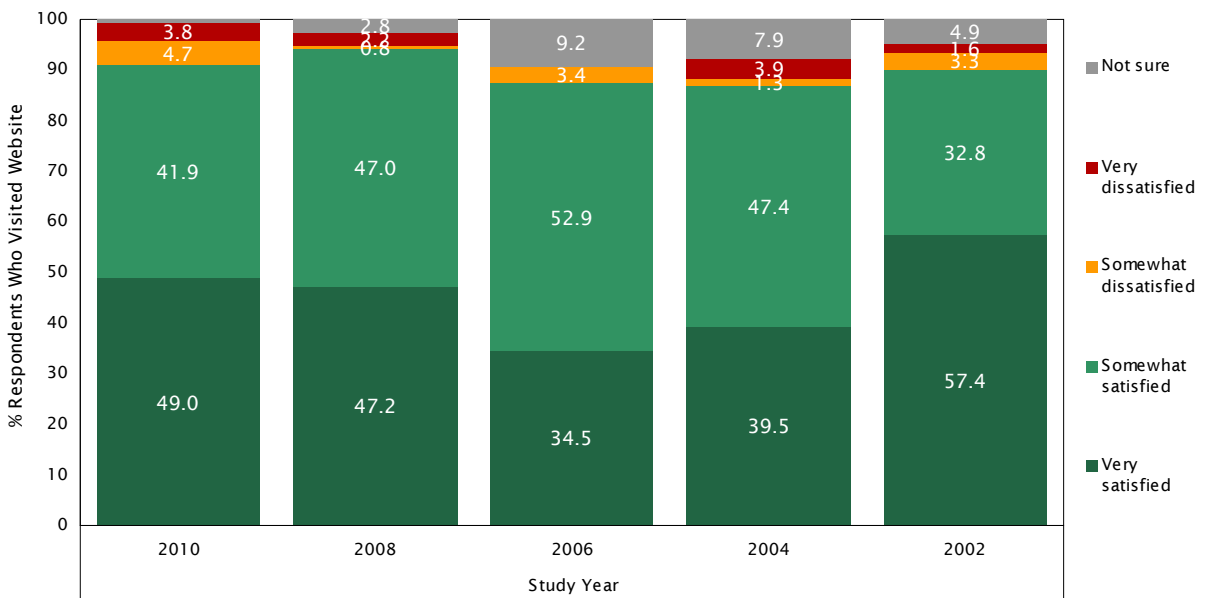
**FIGURE 61 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY (2010 ~ 2002)**



† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

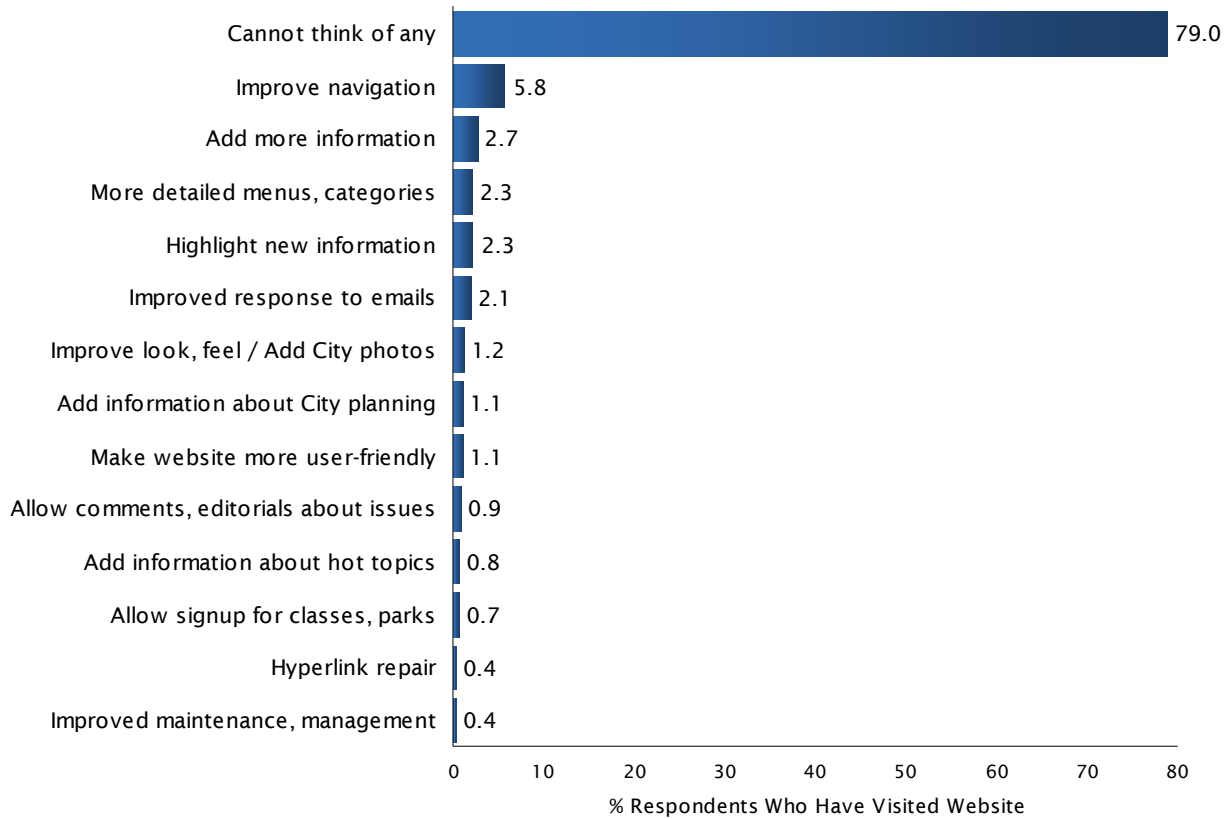
**Question 15: Business Survey** Are you satisfied or dissatisfied with the resources and content available on the City's web sites?

**FIGURE 62 SATISFACTION WITH CITY WEBSITE: BUSINESS SURVEY (2010 ~ 2002)**



**Question 27: Resident Survey** *Do you have any suggestions for ways that the City could improve their websites?*

**FIGURE 63 SUGGESTIONS FOR IMPROVING CITY WEBSITES**

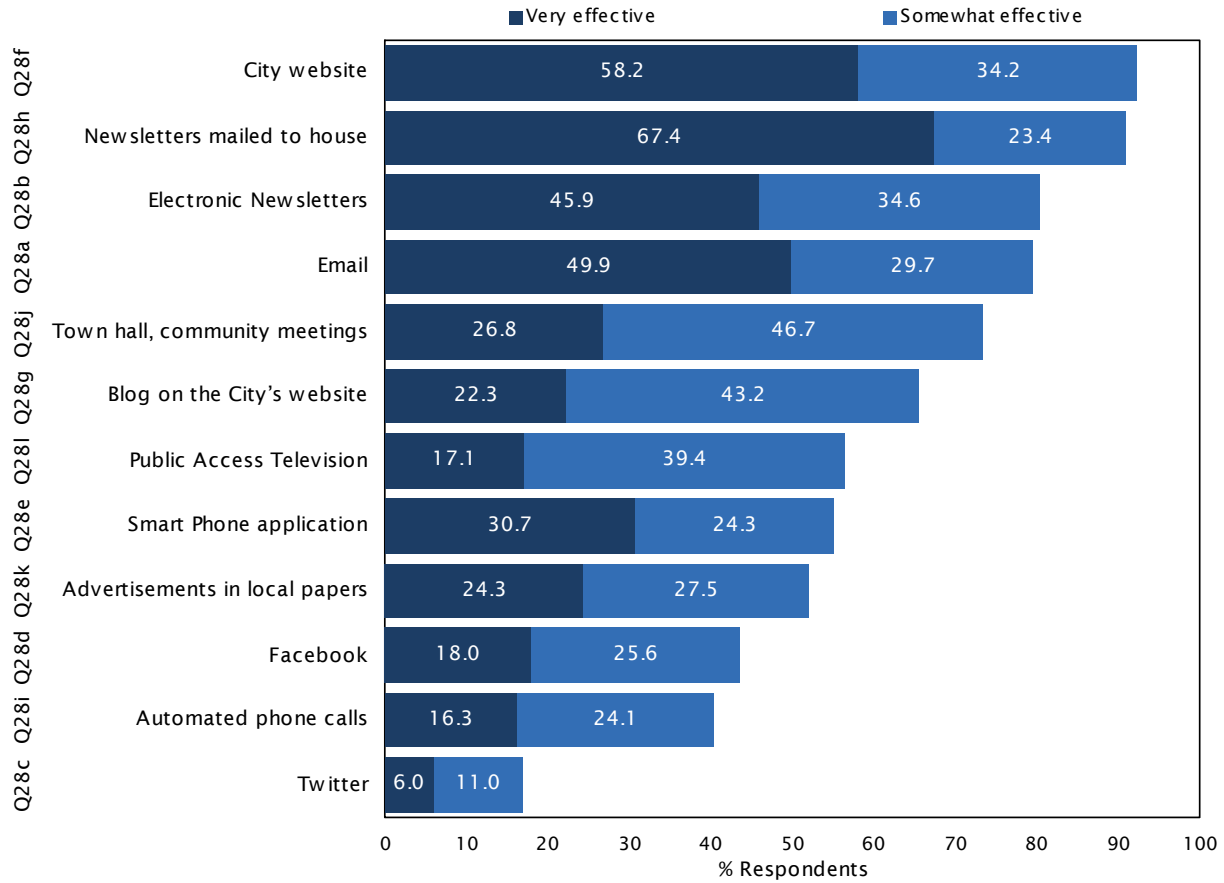


**COMMUNICATION PREFERENCES** The next communication-related question presented respondents with each of the methods shown on the left of Figure 64 and simply asked—for each—whether it would be an effective way for the City to communicate with them. Overall, respondents indicated that the City websites were the most effective method (92%), followed by newsletters mailed directly to their home (91%), electronic newsletters (81%), and email (80%). Other methods that were rated as at least somewhat effective by a majority of those surveyed included town hall/community meetings (74%), a blog on city websites (66%), public access television (57%), smart phone application (55%), and advertisements in local papers (52%). When compared to the other methods tested, residents rated Facebook (44%), automated telephone calls (40%), and Twitter (17%) as the least effective ways for the City to communicate with them.

For the interested reader, Table 23 shows how the percentage of residents that rated each communication method as *very* effective differed by age cohort.

**Question 28: Resident Survey** *As I read the following ways that the City of Lake Forest can communicate with residents, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with you.*

**FIGURE 64 EFFECTIVENESS OF COMMUNICATION METHODS**



**TABLE 23 EFFECTIVENESS OF COMMUNICATION METHODS BY AGE (SHOWING % VERY EFFECTIVE)**

	Age				
	18 to 29	30 to 39	40 to 49	50 to 64	65 or
Newsletters mailed to house	70.1	69.2	71.4	65.2	62.7
City website	66.7	63.9	56.1	55.9	54.9
Email	44.4	60.8	55.8	47.2	41.0
Electronic Newsletters	50.2	48.0	55.0	40.5	38.7
Smart Phone application	47.7	49.9	32.8	23.1	14.1
Advertisements in local papers	45.7	11.0	26.5	20.0	27.5
Town hall, community meetings	24.9	19.4	28.0	29.6	27.6
Blog on the City's website	15.4	17.0	26.6	24.6	21.1
Facebook	23.3	27.7	25.1	12.7	6.2
Automated phone calls	10.3	13.4	21.8	18.5	11.0
Public Access Television	0.0	8.4	20.0	22.3	22.0
Twitter	19.6	5.4	5.1	3.8	3.0

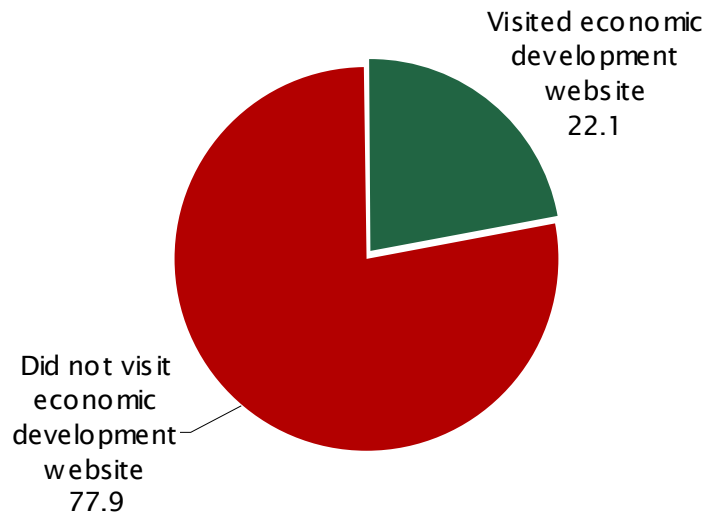


**ECONOMIC DEVELOPMENT WEBSITE** One of the new questions introduced in the 2010 survey of Lake Forest businesses asked respondents whether they had ever visited the City’s economic development website at [www.lakeforestbusiness.com](http://www.lakeforestbusiness.com). As shown in Figure 65, just under one quarter (22%) of local businesses indicated that they had visited the site.

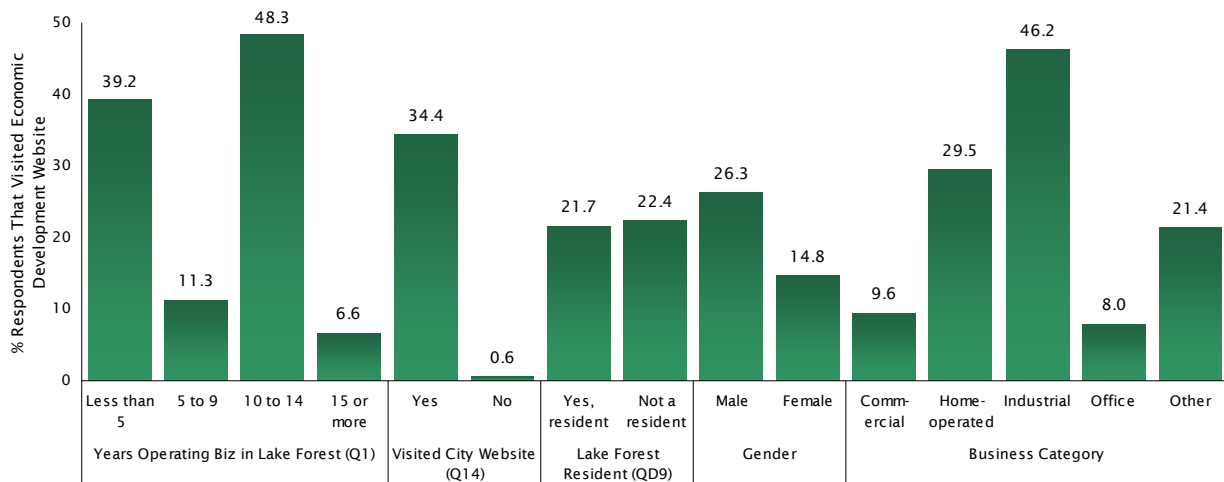
When compared to their respective counterparts, businesses that had operated in the City between 10 and 14 years, those who had visited the City’s main website, males, and those who classified their business as Industrial were the most likely to report having visited the City’s economic development website (see Figure 66).

**Question 16: Business Survey** *Have you ever visited the City's economic development website at [www.lakeforestbusiness.com](http://www.lakeforestbusiness.com)?*

**FIGURE 65 VISITED ECONOMIC DEVELOPMENT WEBSITE**



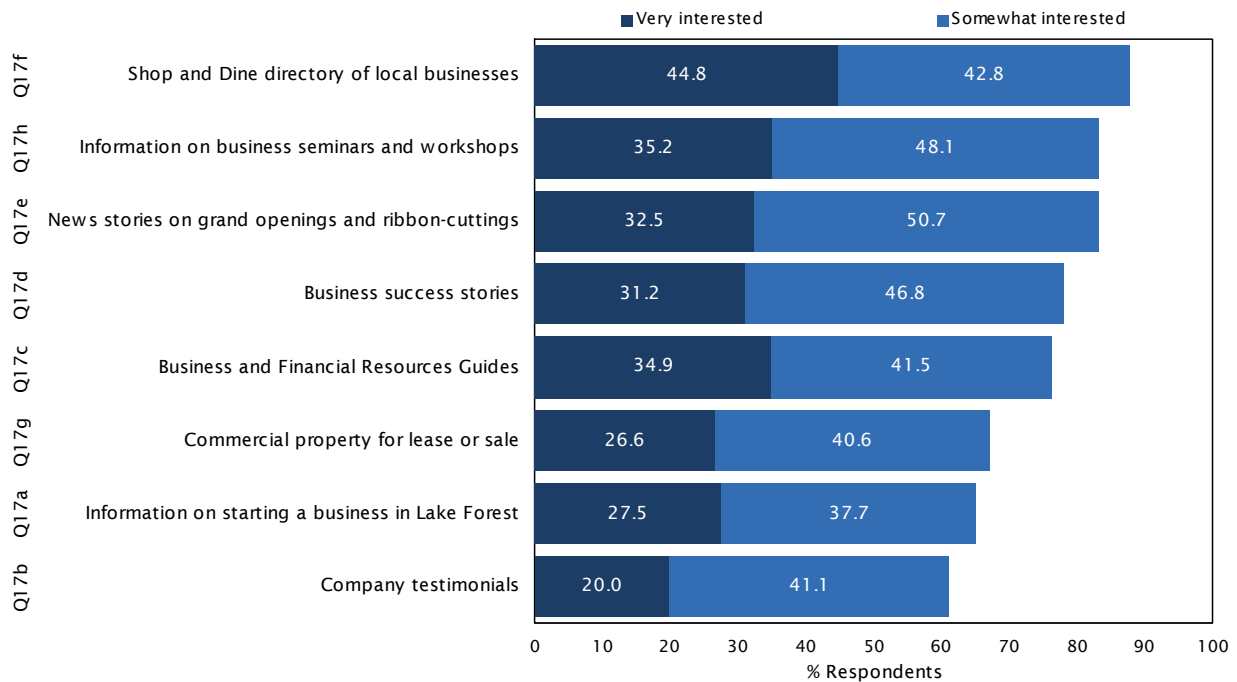
**FIGURE 66 VISITED ECONOMIC DEVELOPMENT WEBSITE BY YEARS OPERATING BUSINESS IN LAKE FOREST, VISITED CITY WEBSITE, LAKE FOREST RESIDENT, GENDER & BUSINESS CATEGORY**



Regardless of whether they had previously visited the City’s economic development website, the survey next asked local businesses to rate their level of interest in a variety of topics that could be addressed on the site to keep it relevant and informative. As shown in Figure 67, respondents expressed the highest levels of interest in a Shop and Dine directory of local businesses (88% very or somewhat interested), followed by information on business seminars and workshops (83%), and news stories on grand openings and ribbon-cuttings (83%). Table 24 shows how interest in these topics varied by type of business and whether the individual had previously visited the economic development website.

**Question 17: Business Survey** *The City wants to ensure that the economic development website is relevant and informative. As I read each of the following topics, please indicate whether you are very interested, somewhat interested, or not interested in this topic.*

**FIGURE 67 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE CONTENT**



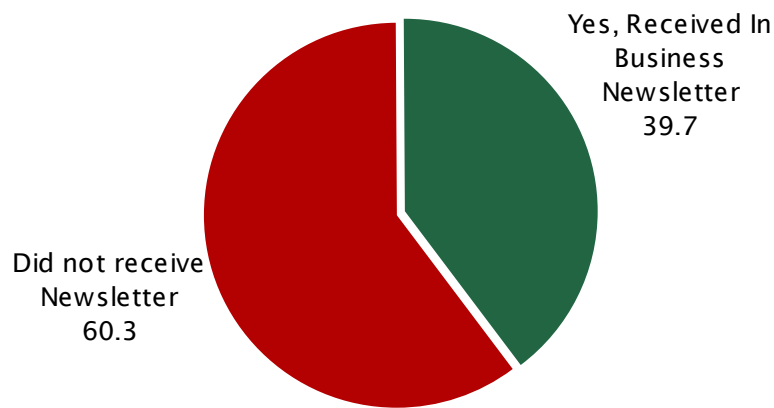
**TABLE 24 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE CONTENT BY BUSINESS CATEGORY & VISITED ECONOMIC DEVELOPMENT WEBSITE (SHOWING % VERY INTERESTED)**

	Business Category					Visited Economic Development Website (Q16)	
	Commercial	Home-operated	Industrial	Office	Other	Yes	No
Shop and Dine directory of local businesses	48.7	52.3	29.1	36.0	64.3	48.3	43.9
News stories on grand openings and ribbon-cuttings	32.2	36.4	23.4	36.0	42.9	38.1	30.9
Information on business seminars and workshops	38.0	38.6	27.5	36.0	14.3	43.7	32.8
Business and Financial Resources Guides	38.5	43.2	24.7	24.0	21.4	40.9	33.1
Commercial property for lease or sale	26.7	25.0	35.4	16.0	28.6	57.8	17.7
Business success stories	36.0	38.6	17.0	24.0	21.4	39.6	28.8
Information on starting a business in Lake Forest	31.9	36.4	18.1	12.0	14.3	30.4	26.7
Company testimonials	23.3	20.5	17.5	16.0	7.1	22.8	19.2

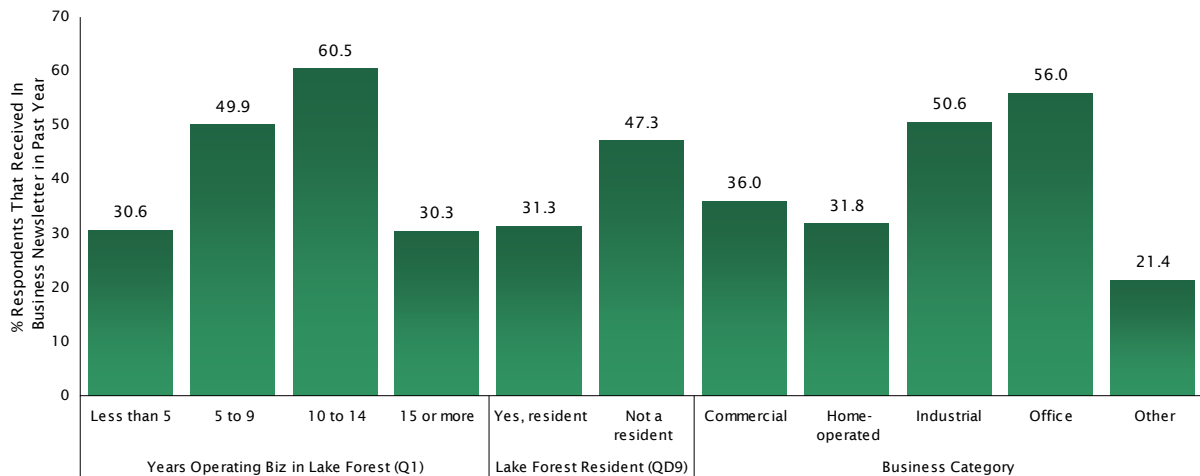
**IN BUSINESS NEWSLETTER** One of the recent innovations that the City of Lake Forest has created to improve its communication with local businesses is the *In Business* newsletter, which is published twice per year. Among those surveyed, 40% recalled receiving the newsletter in the prior year (Figure 68), although businesses that had operated in the City between 10 and 14 years, those that have at least one employee who lives outside the City, and businesses that classify themselves as Office were more likely to recall receiving the *In Business* newsletter (see Figure 69).

**Question 18: Business Survey** *In the past year, do you recall receiving the City's newsletter for local businesses called "In Business"? It is published twice per year.*

**FIGURE 68 RECEIVED IN BUSINESS NEWSLETTER IN PAST YEAR**



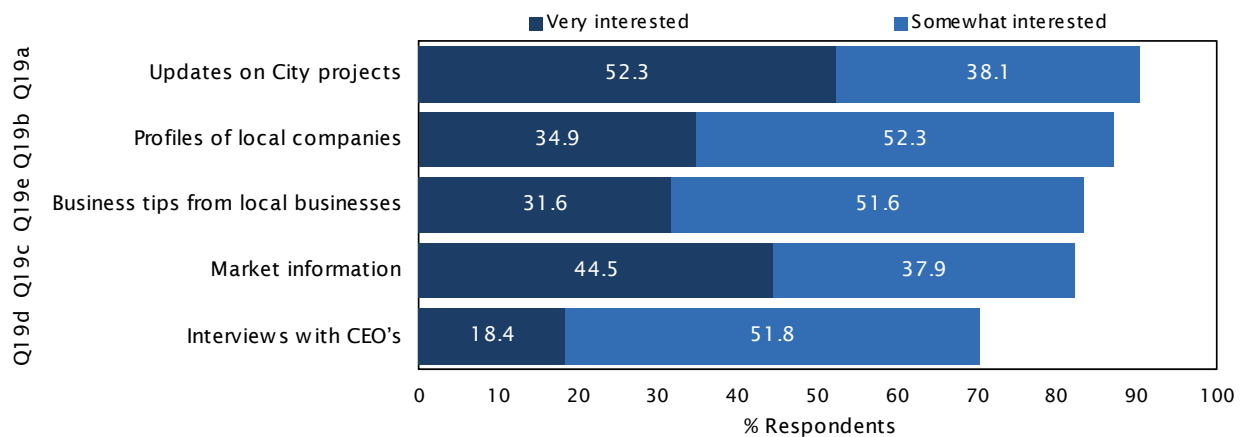
**FIGURE 69 RECEIVED IN BUSINESS NEWSLETTER IN PAST YEAR BY YEARS OPERATING BUSINESS IN LAKE FOREST, LAKE FOREST RESIDENT & BUSINESS CATEGORY**



In a manner similar to that described above with respect to the economic development website, local businesses were asked to rate their level of interest in a variety of potential topics for the *In Business* newsletter in order to keep it relevant and informative. Among the topics tested, local businesses expressed the most interest in updates on City projects (90%), profiles of local companies (87%), and business tips from other Lake Forest businesses (83%). Table 25 displays how interest in each topic varied by category of business and whether they recalled receiving the *In Business* newsletter during the prior 12 month period.

**Question 19: Business Survey** *The City wants to ensure that the In Business newsletter is relevant and informative. As I read each of the following topics, please indicate whether you are very interested, somewhat interested, or not interested in this topic.*

**FIGURE 70 INTEREST IN BUSINESS NEWSLETTER CONTENT**



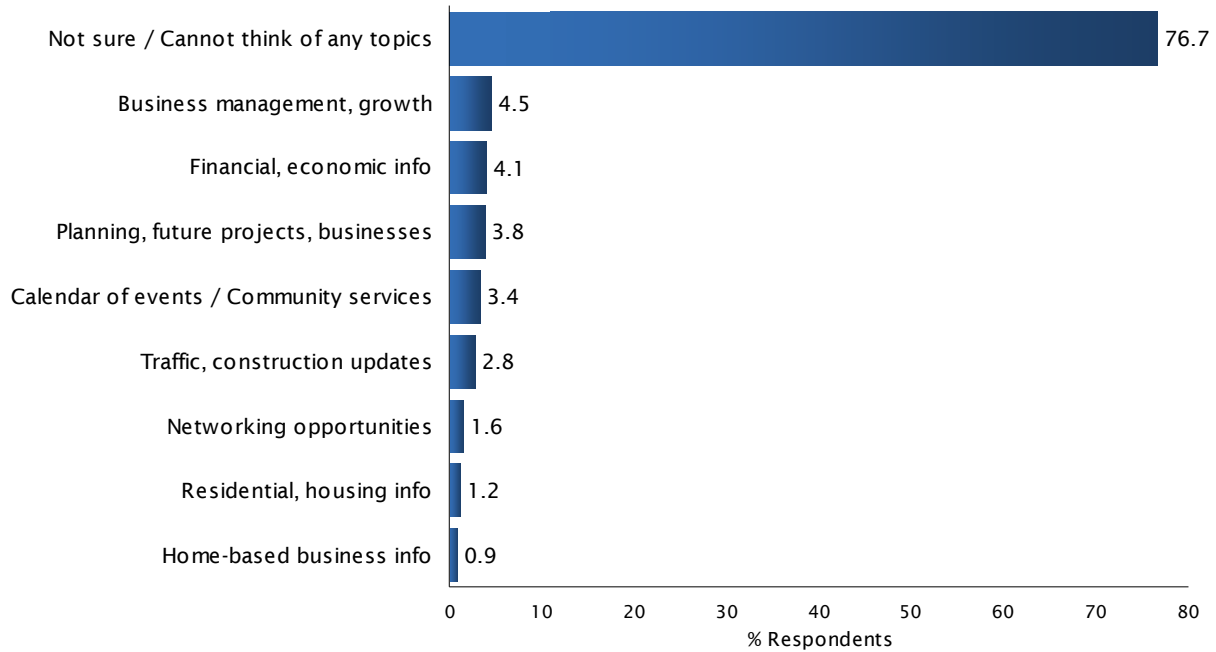
**TABLE 25 INTEREST IN BUSINESS NEWSLETTER CONTENT BY BUSINESS CATEGORY & RECEIVED IN BUSINESS NEWSLETTER**

	Business Category					Received In Business Newsletter (Q18)	
	Commercial	Home-operated	Industrial	Office	Other	Yes	No
Updates on City projects	40.1	59.1	71.8	48.0	42.9	67.6	42.3
Market information	47.0	38.6	54.1	32.0	57.1	59.2	34.7
Profiles of local companies	33.2	43.2	30.2	32.0	21.4	45.8	27.7
Business tips from local businesses	31.9	43.2	16.8	32.0	14.3	41.4	25.2
Interviews with CEO's	19.5	22.7	13.2	16.0	7.1	20.2	17.2

Recognizing that the list of topics tested in Question 19 was fairly limited, Question 20 followed-up by asking respondents whether there were any additional topics that they would like addressed in the newsletter. Approximately three-quarters (77%) of respondents indicated that they weren't sure or could not think of any specific topics at that point in the interview (see Figure 71 on the next page). Specific topics of interest that were mentioned included business management/growth (5%), financial and economic information (4%), planning for future projects/businesses (4%), and a calendar of events/community services (3%).

**Question 20: 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 71** ADDITIONAL IN BUSINESS NEWSLETTER TOPICS DESIRED

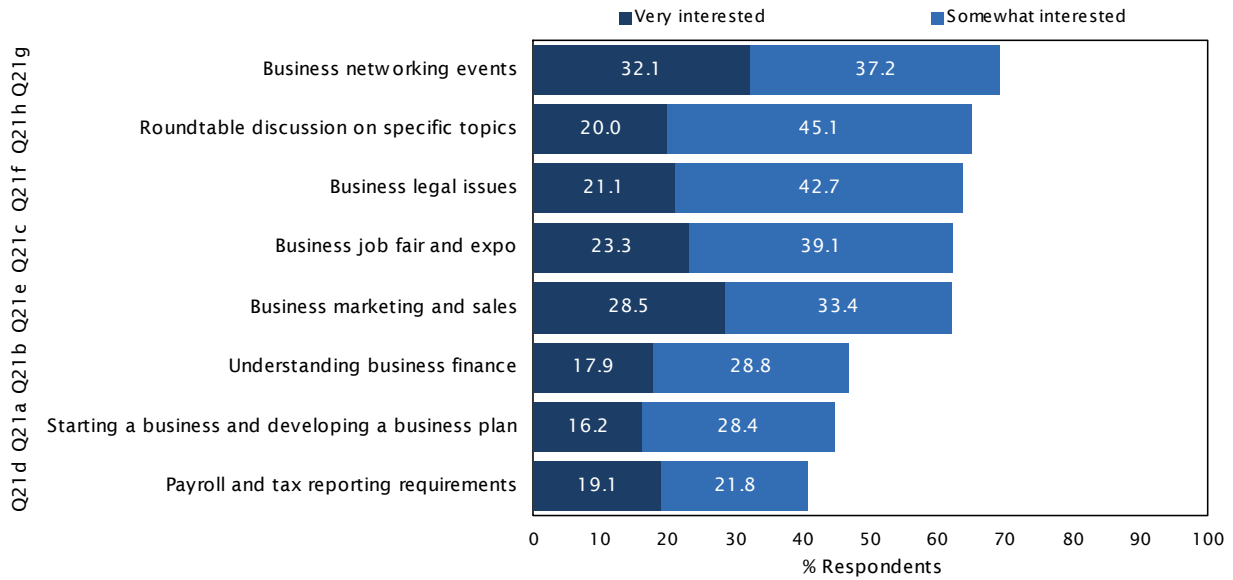


**BUSINESS WORKSHOPS** Continuing with the theme of identifying topics and services of interest to local businesses, participants in the business survey were also asked about their interest in attending a variety of seminars that the City is considering hosting for local businesses. The seminar topics—and respondents’ stated interest in each—are shown in Figure 72 on the next page.

Overall, Lake Forest businesses expressed the greatest interest in attending business networking events (69% very or somewhat interested), followed by roundtable discussions on specific topics (65%), and workshops on legal issues that affect businesses (64%). Other events that were popular with at least 50% of those surveyed included a business job fair and expo (62%) and a seminar on marketing and sales (62%). When compared to 2008, interest in roundtable discussions on specific topics increased significantly (see Table 26). Table 27 shows how the percentage of respondents who expressed being very interested in each seminar topic varied by category of business.

**Question 21: Business Survey** *The City of Lake Forest also hosts 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 72 INTEREST IN BUSINESS WORKSHOP TOPICS**



**TABLE 26 INTEREST IN BUSINESS WORKSHOP TOPICS (2010 ~ 2008)**

	Study Year		Change in Very + Smwt Interested
	2010	2008	
Roundtable discussion on specific topics	65.1	54.2	+10.9†
Business legal issues	63.8	60.7	+3.1
Business job fair and expo	62.4	61.5	+0.9
Business networking events	69.3	69.7	-0.4
Starting a business and developing a business plan	44.6	46.6	-2.0
Business marketing and sales	62.0	65.7	-3.7
Payroll and tax reporting requirements	40.8	45.4	-4.6
Understanding business finance	46.7	51.9	-5.2

† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

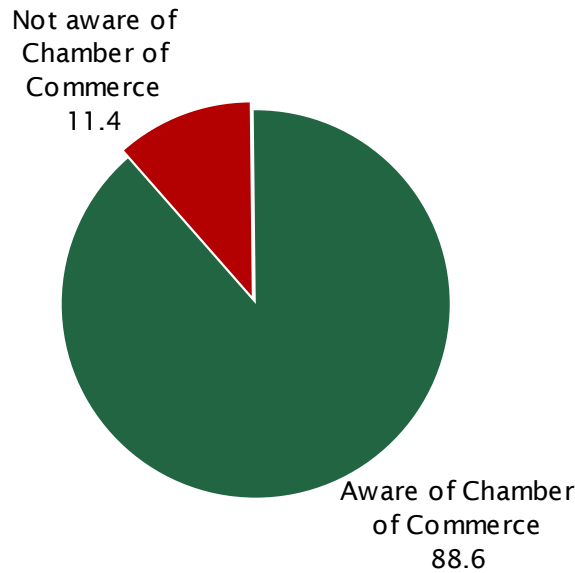
**TABLE 27 INTEREST IN BUSINESS WORKSHOP TOPICS (SHOWING % VERY INTERESTED) BY BUSINESS CATEGORY**

	Business Category				
	Commercial	Home-operated	Industrial	Office	Other
Business networking events	36.5	45.5	9.5	28.0	14.3
Business marketing and sales	30.4	43.2	13.0	16.0	21.4
Business job fair and expo	27.1	27.3	18.5	12.0	14.3
Payroll and tax reporting requirements	17.1	25.0	21.4	8.0	21.4
Roundtable discussion on specific topics	20.0	29.5	13.8	8.0	21.4
Business legal issues	22.0	34.1	7.6	12.0	14.3
Understanding business finance	18.4	27.3	10.0	12.0	0.0
Starting a business and developing a business plan	16.8	22.7	16.2	4.0	0.0

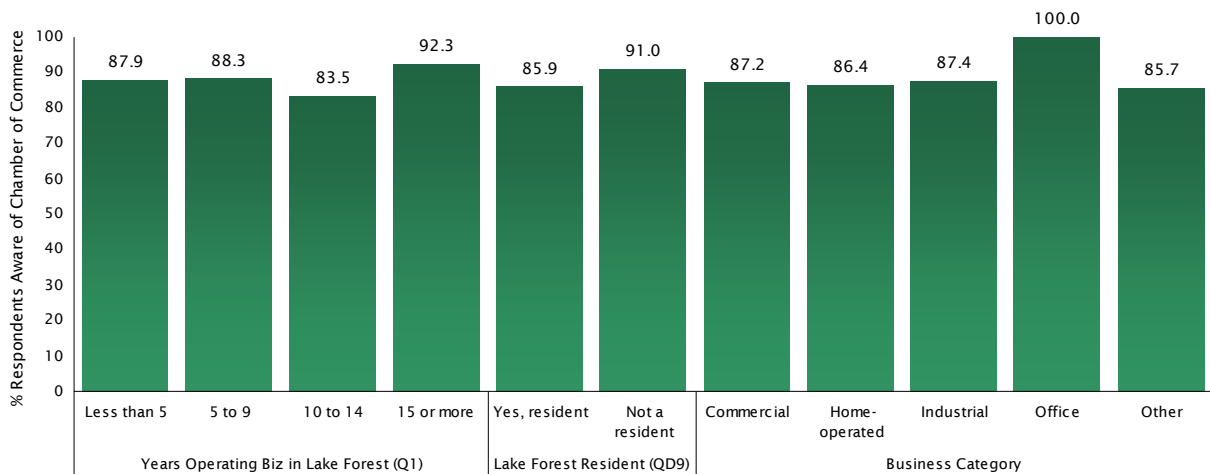
**CHAMBER OF COMMERCE** The final substantive section of the business survey was devoted to the Lake Forest Chamber of Commerce. The first question in this series simply asked local businesses whether—prior to taking the survey—they were aware of the Lake Forest Chamber of Commerce. Overall, nearly 9 out of 10 local businesses (89%) indicated that they were aware of the Lake Forest Chamber of Commerce prior to participating in the survey. The high level of recognition for the Chamber was consistent across subgroups of Lake Forest businesses as well (see Figure 74).

**Question 22: Business Survey** *Prior to taking this survey, were you aware that there is a Lake Forest Chamber of Commerce?*

**FIGURE 73 AWARENESS OF CHAMBER OF COMMERCE**



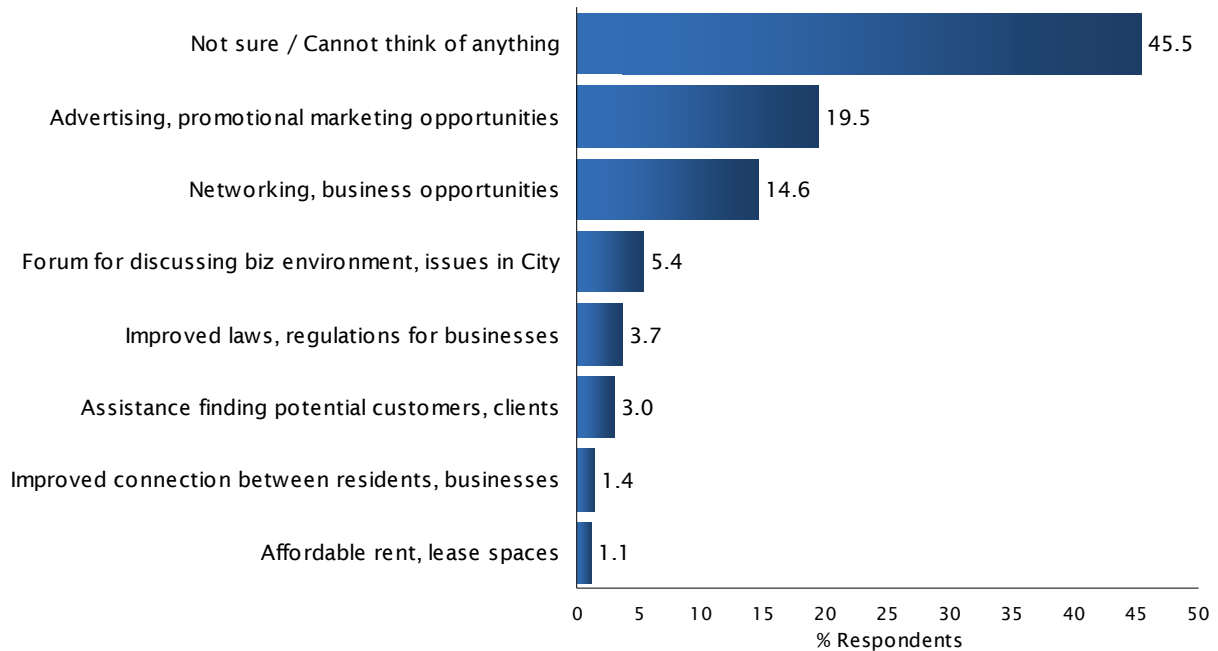
**FIGURE 74 AWARENESS OF CHAMBER OF COMMERCE BY YEARS OPERATING BUSINESS IN LAKE FOREST, LAKE FOREST RESIDENT & BUSINESS CATEGORY**



All business respondents were next asked in an open-ended manner to identify what they would find most beneficial from the Lake Forest Chamber of Commerce. The answers to this question were recorded verbatim and were later grouped by True North into the categories shown in Figure 75 below. Just under half (46%) of respondents were unsure or could not think of a specific way in which the Chamber could benefit their business. Among the specific suggestions that were offered, advertising and promotional marketing opportunities was the most frequently cited (20%), followed by networking and business opportunities (15%), and providing a forum for discussing the business environment and related issues in the City (5%).

**Question 23: 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 my business would find most beneficial from the Lake Forest Chamber of Commerce is: \_\_\_\_\_.*

**FIGURE 75 DESIRED SERVICES FROM CHAMBER OF COMMERCE**





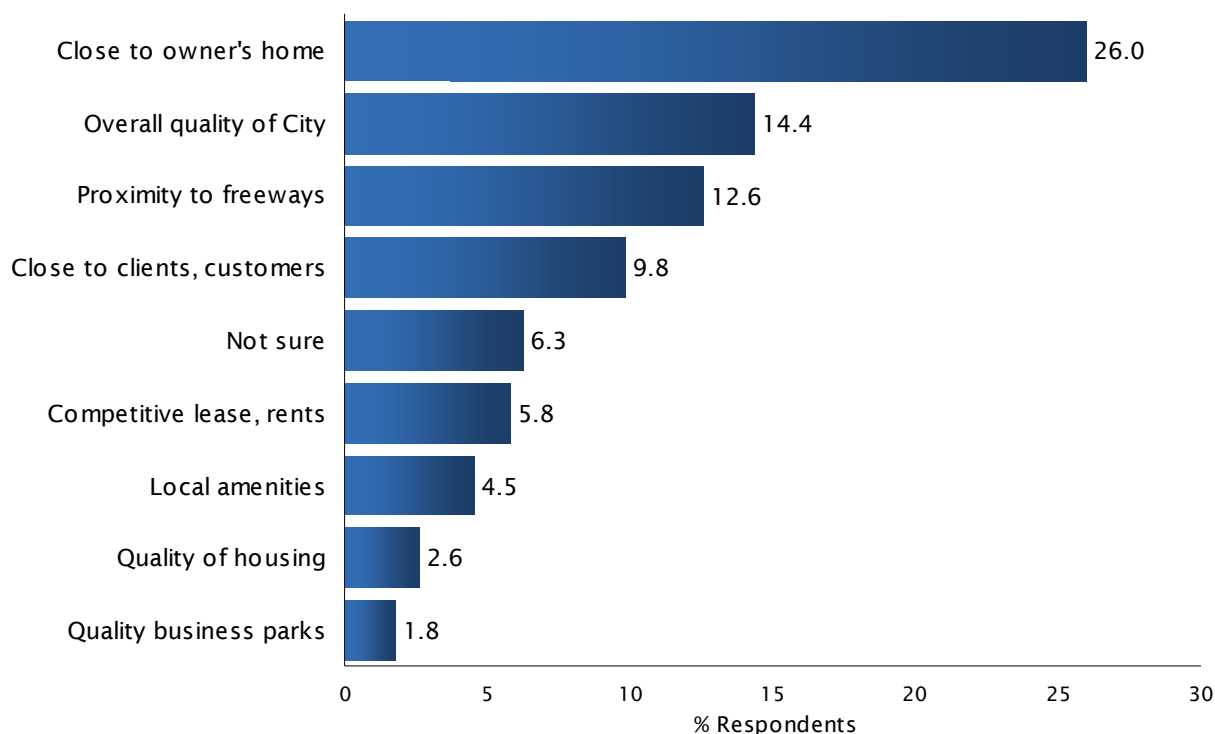
## BUSINESS BACKGROUND INFO

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, one-quarter (26%) indicated that it is close to the owner's home. Other reasons cited by at least 5% of respondents included the overall quality of life in the City (14%), its proximity to freeways (13%), clients and customers (10%), and the competitive lease and rental rates in the City (6%).

**Question D3: 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?*

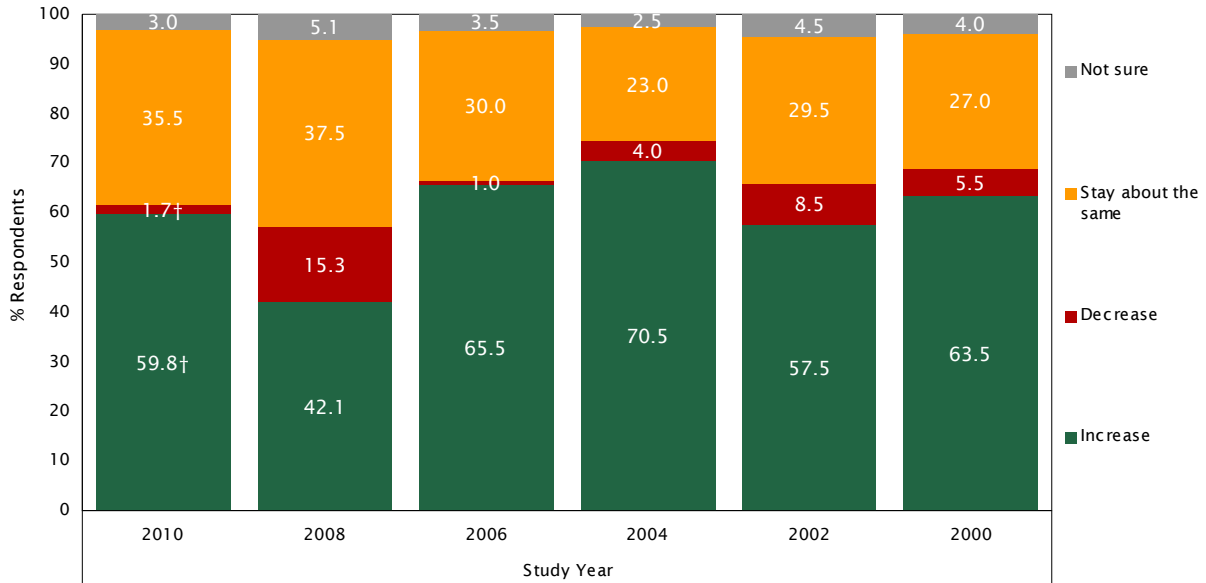
**FIGURE 76 PRIMARY REASON FOR LOCATING BUSINESS IN LAKE FOREST**



**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 2010 are shown in Figure 77 on the next page. As in prior years, local businesses were generally optimistic about their future growth, with 60% anticipating growth and 36% expecting that their business would remain about the same. Just 2% indicated that they expect their business to decrease in the coming year. When compared to the 2008 survey that was conducted during the heart of the economic recession, there was a statistically significant increase in 2010 in the percentage of Lake Forest businesses that expected their business to increase (and a corresponding decline in those who expected a decline) during the upcoming year.

**Question D4: Business Survey** *In the next 12 months, do you think your business will increase, decrease, or stay about the same?*

**FIGURE 77 BUSINESS SIZE IN NEXT 12 MONTHS (2010 ~ 2000)**

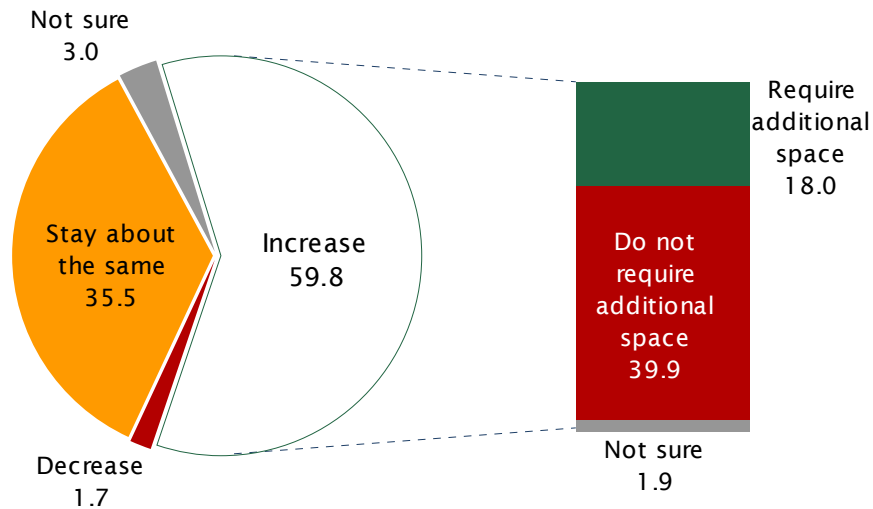


† Statistically significant change ( $p < 0.05$ ) between the 2008 and 2010 studies.

Among the 60% of businesses that anticipated growth, 18% indicated that they would require additional space whereas the remaining 42% were either unsure or did not anticipate needing additional space (Figure 78).

**Question D5: Business Survey** *To accommodate the growth in your business, will you require additional square footage or a larger building?*

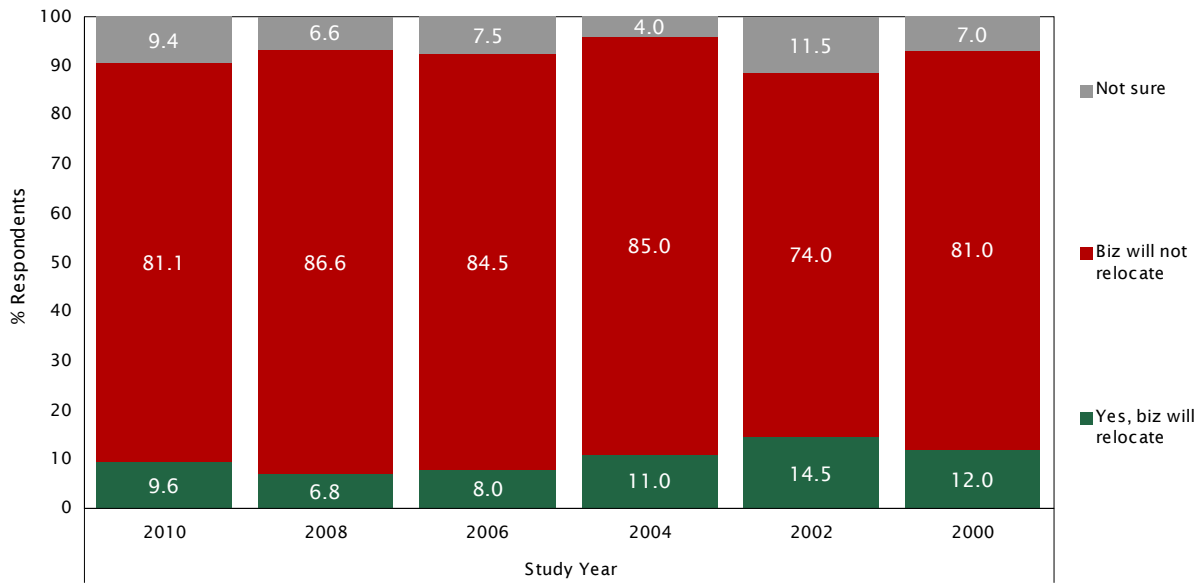
**FIGURE 78 BUSINESS SIZE AND SQUARE FOOTAGE REQUIREMENTS IN NEXT 12 MONTHS**



**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 79 shows the proportion of businesses that anticipated relocating in 2010 was 10%, which is similar to the rate recorded since 2006, but lower than in prior years. Of the 10% of businesses that anticipated relocating in the next year, approximately one-third (3%) expected to relocate to another community, 2% within Lake Forest, and 5% were unsure (Figure 80).

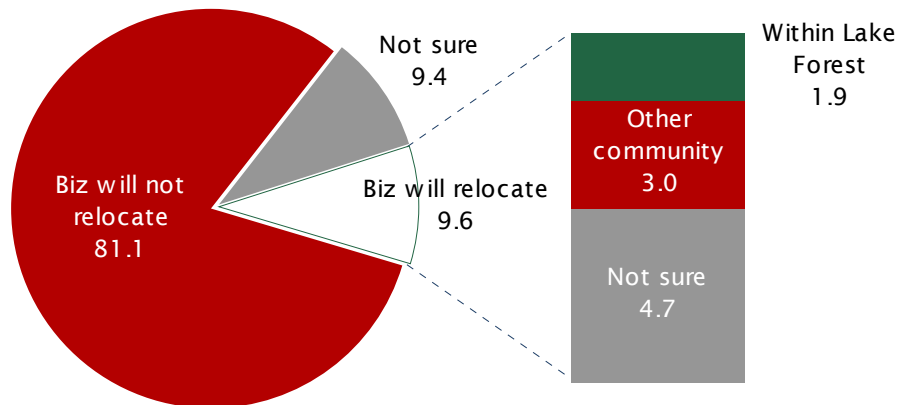
**Question D4: Business Survey** *In the next 12 months, do you think your business will relocate?*

**FIGURE 79 BUSINESS RELOCATION IN NEXT 12 MONTHS (2010 ~ 2008)**



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

**FIGURE 80 BUSINESS RELOCATION IN NEXT 12 MONTHS**



**TABLE 28 SAMPLE DEMOGRAPHICS: BUSINESS SURVEY (2010 ~ 2000)**

Study Year	2010	2008	2006	2004	2002	2000
<i>Total Respondents</i>	200	200	200	200	200	200
<b>QD1 Number of employees</b>						
1	20.8	N/A	N/A	N/A	N/A	N/A
2 to 5	37.1	N/A	N/A	N/A	N/A	N/A
6 to 10	12.7	N/A	N/A	N/A	N/A	N/A
More than 10	26.7	N/A	N/A	N/A	N/A	N/A
Refused	2.7	N/A	N/A	N/A	N/A	N/A
<b>QD2 Number of employees live outside Lake Forest</b>						
None	27.2	N/A	N/A	N/A	N/A	N/A
1	11.0	N/A	N/A	N/A	N/A	N/A
2 to 5	28.3	N/A	N/A	N/A	N/A	N/A
6 to 10	10.9	N/A	N/A	N/A	N/A	N/A
More than 10	19.5	N/A	N/A	N/A	N/A	N/A
Refused	3.1	N/A	N/A	N/A	N/A	N/A
<b>QD8 Resident of Lake Forest</b>						
Yes	47.2	34.5	30.5	23.5	42.5	N/A
No	52.8	63.5	68.5	76.5	55	N/A
Refused	0.0	2.0	1.0	0.0	2.5	N/A
<b>QS1 Gender</b>						
Male	64.1	58.0	58.0	57.0	68.0	71.0
Female	35.9	42.0	42.0	43.0	32.0	29.0
<b>QS2 Business category</b>						
C-FR	6.2	8.5	6.0	4.5	4.5	N/A
C-Southwest	12.6	8.5	8.5	8.0	8.0	N/A
C-Midcity	11.7	8.0	8.0	8.5	10.0	N/A
C-RDA	7.7	10.5	11.0	11.5	12.5	N/A
Homeoccs	27.3	15.0	12.5	12.5	13.0	N/A
I-AspanLambert	4.6	9.0	8.0	10.5	12.0	N/A
I-Midcity	2.6	12.5	13.0	18.0	20.5	N/A
I-FRPH	10.3	3.5	4.0	4.5	4.0	N/A
I-RDA	1.4	2.5	2.0	2.5	2.5	N/A
Office	12.6	11.5	17.5	17.5	11.0	N/A
Other	3.0	10.5	9.5	2.0	2.0	N/A

Table 28 provides information that was collected from local businesses during the 2010 survey, along with the results to similar questions asked in prior surveys (where applicable). The information presented in the table was gathered during the survey or from the City's database of local businesses.



## RESIDENT DEMOGRAPHIC INFO

**TABLE 29 SAMPLE DEMOGRAPHICS: RESIDENT SURVEY (2010 ~ 2002)**

Study Year	2010	2008	2006	2004	2002
<b>Total Respondents</b>	<b>400</b>	<b>400</b>	<b>400</b>	<b>400</b>	<b>400</b>
<b>QD1 Employment status</b>					
Employed full-time	51.2	54.6	58.5	N/A	N/A
Employed part-time	9.1	13.7	11.0	N/A	N/A
Student	3.6	2.6	3.7	N/A	N/A
Homemaker	5.0	8.4	7.9	N/A	N/A
Retired	19.2	13.6	16.0	N/A	N/A
In-between jobs	9.0	6.0	1.9	N/A	N/A
Refused	2.9	0.9	1.1	N/A	N/A
<b>QD2 Child in home</b>					
Yes	43.9	41.3	43.4	44.5	44.8
No	54.0	58.5	56.4	55.0	54.3
Refused	2.1	0.2	0.2	0.5	1.0
<b>QD3 Live in HOA</b>					
Yes	75.6	74.8	73.3	72.8	73.3
No	22.2	24.4	25.6	26.0	25.3
Refused	2.2	0.8	1.1	1.3	1.5
<b>QD6 Household income</b>					
Under \$40K	10.6	8.1	7.0	9.5	11.5
\$40K to \$59K	11.8	10.1	10.3	14.8	15.3
\$60K to \$79K	13.4	13.9	16.8	21.0	12.8
\$80K to \$99K	15.8	15.9	10.7	13.3	17.0
\$100K or more	36.0	36.6	42.4	31.3	29.3
Not sure / Refused	12.5	15.4	12.9	10.3	14.3
<b>QD5 Gender</b>					
Male	47.7	47.7	47.5	49.8	49.3
Female	52.3	52.3	52.5	50.3	50.8
<b>S1 Party</b>					
Democrat	26.7	26.9	25.5	28.3	26.5
Republican	49.6	50.2	52.5	50.3	54.8
Other	4.9	4.4	5.1	4.3	4.8
DTS	18.8	18.5	17.0	17.3	14.0
<b>S2 Age</b>					
18 to 29	11.1	13.4	13.4	14.5	14.8
30 to 39	15.3	17.2	16.9	20.8	22.8
40 to 49	23.9	25.9	26.9	28.8	26.5
50 to 64	32.2	28.6	29.9	23.8	23.5
65 and older	17.5	14.9	13.0	12.3	12.3
<b>S6 Home Ownership status</b>					
Own	79.9	72.0	75.3	66.5	N/A
Rent	20.1	28.0	24.7	33.5	N/A

Table 29 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).



## 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 82) 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 2010 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 2,665 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.<sup>2</sup> 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 44,421 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:

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

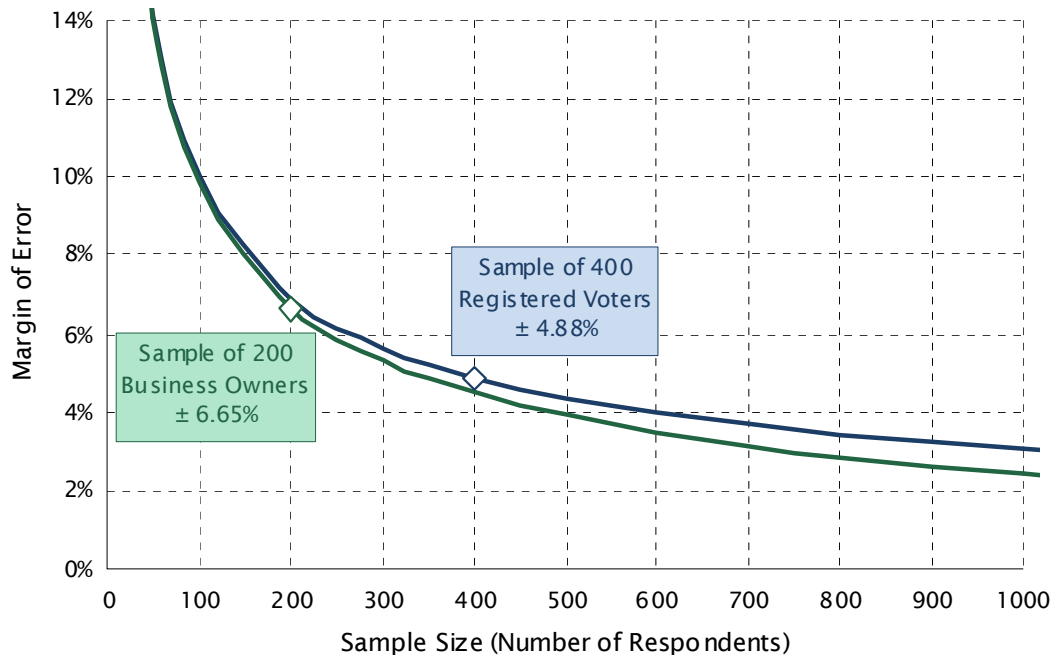
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2. As noted previously, the business sample was based on a universe of businesses that was not as heavily weighted toward home-based businesses as is the actual universe.

where  $\hat{p}$  is the proportion of voters who have interacted with the Department in the past year (0.1 for 10% in this example),  $N$  is the population size of all registered voters (44,421),  $n$  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  $\pm 2.93\%$ . This means that, with 10% 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 7% and 13%.

Figure 81 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  $\pm 6.65\%$ .

**FIGURE 81 MAXIMUM MARGIN OF ERROR**



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 81 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.

**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 2010 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 December 10, 2010, with interviewing suspended during the Thanksgiving holiday period. 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 December 10, 2010 and January 10, 2011, although interviewing was suspended over the Christmas holiday. The business interviews averaged 17 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 2008 and 2010 was due to an actual change in opinions or was likely an artifact of independently drawn cross-sectional samples.

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

# QUESTIONNAIRES & TOPLINES

## RESIDENT SURVEY



**City of Lake Forest  
Resident Survey  
Final Toplines  
January 2011**

### Section 1: Introduction to Study

Hello, may I please speak to \_\_\_\_\_? Hi, 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, and I won't ask for a donation.

*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
	2	5 years to less than 10 years
	3	10 years to less than 15 years
	4	15 or more years
	99	Refused
Q2	What do you feel is the most important issue facing residents of Lake Forest? <i>Probe: Any others? Verbatim responses recorded and later grouped into categories shown below.</i>	
		Cannot think of any issues
		Traffic congestion
		Local economy, jobs
		Crime / Public safety
		Education
		Availability, cost of housing
		Parks / Recreation
		Redevelopment
		Road repair, maintenance
		Illegal immigrant issue
		Overcrowding / Growth
		Maintaining public facilities
		Neighborhood code issues

	Animal control	3%
	Taxes / Fees	2%
	Shopping, entertainment options	2%
	Homeless issue	2%
	Cost of living	2%
	Quality of life	2%
	Pollution / Environment	1%
	Speeding vehicles	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	51%
	2 Good	45%
	3 Fair	4%
	4 Poor	0%
	5 Very Poor	0%
	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	57%
	2 Somewhat satisfied	34%
	3 Somewhat dissatisfied	4%
	4 Very dissatisfied	1%
	98 Not sure	4%
	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: ----- Verbatim responses recorded and later grouped into categories shown below.	
	Cannot think of anything	16%
	Increased crime prevention, safety	11%
	Reduced, improved traffic	9%
	Increased, improved parks, recreation	8%
	Keep doing what they are doing	6%
	Better, more schools	5%
	Road improvements	4%
	Better community spirit / Family values	4%
	Increased job opportunities	4%

Street sweeping, beautification	3%
Better government leadership	3%
Improved economic environment	3%
Complete unfinished projects	3%
Improved, maintained landscapes	3%
Cleaner air / Better environmental effort	2%
More affordable housing	2%
Limited growth	2%
Enforced immigration laws	2%
Lower taxes, fees	2%
Maintained infrastructure	2%
Improved animal services	2%
Maintained service levels	2%
Improved quality of life	2%
Improved senior programs	2%
Improved shopping, entertainment options	1%
Improved public transportation	1%
Reduced rents / Rent control	1%
Improved property values	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%	46%	31%	6%	1%	0%
B	Investigating criminal activity	36%	57%	6%	1%	0%	0%
C	Providing child safety programs	21%	44%	29%	4%	1%	0%
D	Enforcing traffic laws	14%	50%	31%	5%	0%	0%
E	Maintaining a low crime rate	44%	51%	4%	0%	0%	0%
F	Preparing for emergencies	28%	52%	18%	2%	0%	0%
G	Providing crossing guards near schools	19%	49%	25%	5%	1%	0%

H	Providing animal control services	11%	30%	46%	12%	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. 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	32%	33%	8%	3%	23%	0%
B	Investigate criminal activity	50%	25%	3%	2%	19%	1%
C	Provide child safety programs	36%	31%	3%	1%	29%	0%
D	Enforce traffic laws	51%	33%	5%	2%	8%	1%
E	Maintain a low crime rate	66%	26%	3%	1%	4%	0%
F	Prepare for emergencies	38%	27%	4%	2%	29%	1%
G	Provide crossing guards near schools	64%	21%	1%	1%	12%	0%
H	Provide animal control services	39%	33%	6%	3%	18%	0%

#### Section 4: Development Services

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. 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%	39%	31%	11%	9%	0%
B	Inspecting buildings	14%	46%	24%	9%	6%	0%
C	Enforcing zoning regulations	11%	39%	33%	9%	9%	0%
D	Enforcing sign regulations	6%	33%	34%	17%	10%	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	21%	26%	3%	1%	49%	0%
B	Inspect buildings	22%	23%	2%	1%	51%	1%
C	Enforce zoning regulations	28%	25%	2%	2%	43%	1%
D	Enforce sign regulations	27%	29%	3%	1%	40%	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					10%
	2	No					89%
	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	11%	43%	38%	6%	1%	0%
B	Maintaining trees	14%	50%	32%	4%	0%	0%
C	Preventing storm-water pollution	21%	55%	19%	4%	2%	0%
D	Reducing traffic congestion	29%	57%	12%	1%	1%	0%
E	Maintaining local streets and roads	28%	65%	7%	0%	0%	0%
F	Providing bike paths and pedestrian facilities	17%	48%	31%	4%	1%	0%
G	Maintaining parks and picnic areas	21%	57%	20%	1%	0%	0%
H	Maintaining public landscapes	14%	53%	30%	3%	0%	0%
I	Garbage and recycling services	27%	57%	13%	1%	1%	1%

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	53%	34%	3%	2%	8%	0%
B	Maintain trees	60%	29%	3%	2%	7%	0%
C	Prevent storm-water pollution	39%	30%	2%	1%	27%	1%
D	Reduce traffic congestion	26%	46%	14%	7%	7%	0%
E	Maintain local streets and roads	54%	37%	6%	2%	1%	0%
F	Provide bike paths and pedestrian facilities	52%	34%	3%	1%	9%	0%
G	Maintain parks and picnic areas	66%	25%	2%	1%	6%	0%
H	Maintain public landscapes	63%	29%	2%	2%	5%	0%
I	Provide garbage and recycling services	67%	23%	3%	1%	7%	0%

#### Section 6: Community Services Department

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	21%	33%	26%	13%	6%	0%
B	Providing recreation programs for pre-school children	15%	31%	28%	19%	6%	0%
C	Providing recreation and sports programs for elementary school-aged children	18%	49%	21%	8%	4%	0%
D	Providing recreation and sports programs for teens	22%	50%	19%	6%	4%	0%
E	Providing adult recreation programs such as classes, concerts and trips	10%	28%	46%	15%	2%	0%
F	Providing adult sports programs	6%	22%	49%	19%	3%	0%
G	Providing recreation programs for seniors	14%	37%	38%	9%	1%	0%
H	Providing recreation programs for families	12%	34%	40%	10%	2%	0%
I	Providing special events like concerts in the park and the Fourth of July Parade	16%	42%	33%	8%	0%	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	33%	26%	3%	1%	36%	1%
B	Provide recreation programs for pre-school children	26%	27%	3%	1%	42%	1%
C	Provide recreation and sports programs for elementary school-aged children	36%	26%	3%	2%	32%	0%
D	Provide recreation and sports programs for teens	30%	25%	3%	3%	38%	1%
E	Provide adult recreation programs such as classes, concerts and trips	36%	29%	4%	1%	30%	0%
F	Provide adult sports programs	24%	23%	5%	2%	45%	1%
G	Provide recreation programs for seniors	31%	22%	3%	1%	42%	0%
H	Provide recreation programs for families	31%	33%	4%	1%	31%	0%
I	Provide special events like concerts in the park and the Fourth of July Parade	59%	28%	1%	1%	10%	0%

#### Section 7: Recreation Center Programming

Q15		The City of Lake Forest is planning to build a new Recreation Center. The Recreation Center will allow the City to offer a variety of programs and activities to residents. For the following list of activities, please indicate whether you or other members of your household would be very interested, somewhat interested, or not interested in participating in this activity at the new Recreation Center.				
<i>Randomize</i>		Very interested	Somewhat interested	Not interested	No Opinion	Prefer not to answer
A	Fitness and exercise	44%	36%	20%	1%	0%
B	Dancing classes	22%	37%	40%	1%	0%
C	Arts and crafts classes	27%	40%	32%	1%	0%
D	Basic and advanced computer classes	26%	37%	36%	1%	0%
E	Educational programs	38%	44%	17%	1%	0%
F	Photography	20%	38%	42%	0%	0%
G	Plays and theater performances	38%	43%	19%	0%	0%
H	Health awareness programs	27%	42%	30%	1%	0%



I	Programs designed for kids and young families	40%	26%	31%	3%	0%
J	First Aid and CPR classes	48%	35%	16%	0%	0%
K	Community activities and special events	39%	44%	16%	1%	0%
L	Cooking classes and demonstrations	27%	39%	33%	1%	0%
Q16	Are there any activities not included in the previous list that a member of your household would be very interested in participating in at the new Recreation Center? Verbatim responses recorded and later grouped into categories shown below.					
	Cannot think of any	65%				
	Sports activities	12%				
	Dog park	3%				
	Music classes	3%				
	Swimming	3%				
	Self-defense classes	2%				
	Senior activities	2%				
	Preschool classes, activities	2%				
	Yoga, fitness classes	2%				
	Field trips / Traveling	2%				
	Special needs population classes	1%				
	Arts, crafts classes	1%				
	Gardening	1%				
	Book reading, writing groups	1%				
	Emergency awareness	1%				
	Concerts / Plays	1%				

#### Section 8: Code Enforcement & Neighborhood Issues

Q17	The City of Lake Forest has created codes to address a variety of issues that can affect a neighborhood, such as illegal parking, abandoned vehicles, non-permitted construction, junk storage and properties not being properly maintained.		
	Overall, are you satisfied or dissatisfied with the City's efforts to enforce code violations, or do you not have an opinion? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>		
	1	Very satisfied	36% <i>Skip to Q19</i>
	2	Somewhat satisfied	26% <i>Skip to Q19</i>
	3	Somewhat dissatisfied	7% <i>Ask Q18</i>
	4	Very dissatisfied	6% <i>Ask Q18</i>
	98	Not sure	25% <i>Skip to Q19</i>
	99	Refused	0% <i>Skip to Q19</i>

Q18	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. Verbatim responses recorded and later grouped into categories shown below.</i>		
	Illegal parking / Cars on street		69%
	Unkempt houses, yards		21%
	No particular issue		9%
	Too many people per household		8%
	Speeding, reckless vehicles		5%
Q19	Thinking of your own neighborhood, are there any issues that are having a negative impact on the appearance, safety, or overall quality of life?		
	1	Yes	31% Ask Q20
	2	No	68% Skip to Q21
	99	Refused	1% Skip to Q21
Q20	Please describe the issues to me. Verbatim responses recorded and later grouped into categories shown below.		
	Parking		23%
	Unkempt properties		15%
	Landscaping		11%
	Drugs		9%
	Sidewalk maintenance		9%
	Animal control issues		7%
	Illegal immigrant issue		6%
	Too many people in one house		5%
	Loitering		5%
	Graffiti / Vandalism		5%
	Traffic signs, lights		5%
	Speeding, reckless vehicles		4%
	Traffic		3%
	Noise pollution		3%
	Growth / Development		3%
	Homeless issue		2%
	Foreclosures		1%

Section 9: City-Resident Communication			
Q21	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	58%
	2	Somewhat satisfied	28%
	3	Somewhat dissatisfied	7%
	4	Very dissatisfied	3%
	98	Not sure	4%
	99	Refused	0%
Q22	Is there a particular topic or issue that you'd like to receive more information about from the City?		
	1	Yes	30%
	2	No	68%
	99	Refused	1%
			Ask Q23
			Skip to Q24
			Skip to Q24
Q23	Please briefly describe the topic. <i>Probe:</i> Any other topics? Verbatim responses recorded and later grouped into categories shown below.		
		City news, updates	14%
		Construction / Infrastructure updates	13%
		Parks, rec facilities	12%
		Crime reports, stats	11%
		Community Center, programs	9%
		Recreational programs, activities	8%
		Traffic updates	7%
		Housing developments	5%
		Senior activities	4%
		Animal shelter / Animal control	3%
		Recycling / Environmental programs	3%
		Emergency preparedness	2%
		Council Meetings	2%
		General code enforcement issues	2%
		Illegal immigration	2%
		Budgeting, spending	2%
		Schools / Education	2%
		Public, personal safety	2%
		Landscaping	2%

	Utilities	2%
	Sex offenders	1%
	Education opportunities	1%
	Parking	1%
	Noise abatement, reduction	1%
	Code for number of people per household	1%
	Barking dogs issue	1%
	Transportation	1%
Q24	What information sources do you use to find out about City of Lake Forest news, information and programming? <i>Don't read list. Record up to first 2 responses. If they say Internet or web, probe to see if a City website and, if yes, which one.</i>	
	1 Saddleback Valley News	6%
	2 Orange County Register	14%
	3 Los Angeles Times	1%
	4 The Leaflet - City Newsletter	36%
	5 Leisure Times - City Newsletter	5%
	6 City Newsletter - no mention of Leaflet or Leisure Times	22%
	7 E-newsletter - electronic newsletter	4%
	8 Redevelopment Newsletter / 'A View from the Arbor'	0%
	9 City Council Meetings	0%
	10 Radio	0%
	11 Television	2%
	12 Internet, not a City site	23%
	13 City Website (not specific)	17%
	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/ Ask Lake Forest	1%
	19 Economic Development site/Lake Forest Business	0%
	20 Flyers at City Facilities	3%
	21 Friends / Other People	4%
	22 Other source	5%
	23 Do Not Receive Information about City	2%
	98 Not sure	2%
	99 Refused	0%

Q25	In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?				
	1	Yes	54%	Ask Q27	
	2	No	43%	Skip to D1	
	99	Refused	2%	Skip to D1	
Q26	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	54%		
	2	Somewhat satisfied	32%		
	3	Somewhat dissatisfied	7%		
	4	Very dissatisfied	0%		
	98	Not sure	7%		
	99	Refused	0%		
Q27	Do you have any suggestions for ways that the City could improve their websites? <i>If yes, ask:</i> Please briefly describe the improvement to me. <i>Verbatim responses recorded and later grouped into categories shown below.</i>				
	Cannot think of any		79%		
	Improve navigation		6%		
	Add more information		3%		
	More detailed menus, categories		2%		
	Highlight new information		2%		
	Improved response to emails		2%		
	Make website more user-friendly		1%		
	Allow signup for classes, parks		1%		
	Add information about City planning		1%		
	Add information about hot topics		1%		
	Allow comments, editorials about issues		1%		
	Improve look, feel / Add City photos		1%		
Q28	As I read the following ways that the City of Lake Forest can communicate with residents, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with you.				
	<i>Randomize</i>	Very	Somewhat	Not at all	Not sure / Refused
A	Email	50%	30%	18%	2%
B	Electronic Newsletters	46%	35%	16%	4%
C	Twitter	6%	11%	76%	7%

D	Facebook	18%	26%	50%	6%
E	A Smart Phone application that would allow you to communicate with the City, report issues, and receive updates	31%	24%	40%	5%
F	City website	58%	34%	3%	4%
G	A Blog on the City's website	22%	43%	31%	4%
H	Newsletters and other materials mailed directly to your house	67%	23%	8%	1%
I	Automated phone calls	16%	24%	59%	0%
J	Town hall and community meetings	27%	47%	24%	2%
K	Advertisements in local papers	24%	28%	45%	3%
L	Public Access Television	17%	39%	40%	4%

#### Section 10: Background & Demographics

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

D1	Which of the following best describes your employment status? Would you say you are employed full-time, part-time, a student, a homemaker, retired, or are you in-between jobs right now?		
	1	Employed full-time	51%
	2	Employed part-time	9%
	3	Student	4%
	4	Homemaker	5%
	5	Retired	19%
	6	In-between jobs	9%
	98	Not sure	0%
	99	Refused	3%
D2	Do you currently have any children under the age of 18 living in your home?		
	1	Yes	44%
	2	No	54%
	99	Refused	2%
D3	Some residents live in Homeowners Associations and some do not. Do you live in a Homeowners Association?		
	1	Yes	76%
	2	No	22%
	99	Refused	2%

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	11%
	2	\$40,000 to \$59,999	12%
	3	\$60,000 to \$79,999	13%
	4	\$80,000 to \$99,999	16%
	5	\$100,000 or more	36%
	98	Not sure	1%
	99	Refused	11%
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	5%
	4	DTS	19%
S2	Age		
	1	18 to 29	11%
	2	30 to 39	15%
	3	40 to 49	24%
	4	50 to 64	32%
	5	65 or older	18%
	99	Not Coded	0%

S3 Registration Date		
	2010 to 2005	39%
	2004 to 2001	21%
	2000 to 1997	16%
	1996 to 1990	14%
	Before 1990	11%
S4 Household Party Type		
	1 Single Dem	11%
	2 Dual Dem	9%
	3 Single Rep	14%
	4 Dual Rep	21%
	5 Single Other	11%
	6 Dual Other	5%
	7 Dem & Rep	8%
	8 Dem & Other	6%
	9 Rep & Other	12%
	0 Mixed (Dem + Rep + Other)	3%
S5 Likely to Vote by Mail		
	1 Yes	42%
	0 No	58%
S6 Home Owner		
	1 Yes	80%
	2 No	20%
S7 Geographic area of City		
	One	23%
	Two	23%
	Three	31%
	Four	23%



## BUSINESS SURVEY



City of Lake Forest  
Business Survey  
Final Toplines  
January 2011

#### 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 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 and I won't ask for a donation.

*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, or you can take the survey online at <URL> and enter <PIN>.

*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	21%
2	5 years to less than 10 years	21%
3	10 years to less than 15 years	18%
4	15 or more years	39%
99	Refused	1%

Q2 What do you feel are the one or two most important issues facing the business community of Lake Forest? *Verbatim responses recorded and later grouped into categories shown below.*

Cannot think of any issues	29%
National, local economic concerns	14%
Taxes / Fees	13%
Competition from other businesses	4%
Traffic congestion	3%
Growth / Development	3%
Government communication, cooperation	3%
Location of City / Access to freeways	3%
Finding qualified workers	3%
El Toro Road construction	2%
Signage issues	2%
Quality of businesses	2%
Networking opportunities	2%

	Customer satisfaction	2%	
	Affordability, availability of commercial space	1%	
	Cost of living	1%	
	Crime / Public safety	1%	
	Demographics of populace	1%	
	Advertising, marketing opportunities	1%	
	Parking / Parking enforcement	1%	
	Illegal immigrants / Day laborers	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	25%
	2	Good	51%
	3	Fair	17%
	4	Poor	1%
	5	Very poor	3%
	98	Not sure	3%
	99	Refused	0%
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. Verbatim responses recorded and later grouped into categories shown below.		
	Not sure / Cannot think of anything		35%
	Freeway access / Proximity to other areas		20%
	Location in general		11%
	City's pro-business efforts, helpful attitude		9%
	Taxes / Fees / Licensing		6%
	Quality, image of City, local community		5%
	Visibility of business / Amount of customer traffic		5%
	Demographics of community		4%
	Number, quality of local businesses, retailers		3%
	Proximity of business to home		3%
	Low crime rate		2%
	Building inspectors / Permitting process		2%
	Affordability, availability of commercial space		2%
	Quality, quantity of housing stock		2%
	Networking opportunities		1%
	Redevelopment, infrastructure improvements		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 63%
	2	Somewhat satisfied 27%
	3	Somewhat dissatisfied 5%
	4	Very dissatisfied 3%
	98	Not sure 3%
	99	Refused 0%
Q6	I'm going to read you a sentence, and I'd like you to finish it for me. Here is the sentence: What I want most from the City of Lake Forest over the next two years is: ----- Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of anything 18%	
	Continue to grow, zone commercial, industrial 15%	
	Improve support of businesses, communication 12%	
	Maintain, improve infrastructure 12%	
	Nothing, keep up good work 9%	
	Reduce traffic / Time traffic lights 6%	
	Reduce taxes, fees, costs 6%	
	Offer, improve advertising opportunities 5%	
	Improve signage regulations 4%	
	Redevelop, beautify, landscape City 3%	
	Improve public safety 3%	
	Improve recreation facilities, programs 3%	
	Improve networking opportunities 3%	
	Increase economic development 3%	
	Improve education, schools 2%	
	Improve budgeting efforts 2%	
	Improve code enforcement 1%	
	Address immigration, day laborer issues 1%	
	Improve parking, parking enforcement 1%	
	Lower housing, real estate costs 1%	

<b>Section 3: Specific Services</b>							
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	8%	34%	30%	23%	7%	0%
B	Investigating criminal activity	20%	65%	11%	3%	1%	0%
C	Enforcing traffic laws	11%	40%	38%	12%	0%	0%
D	Maintaining a low crime rate	32%	64%	2%	3%	0%	0%
E	Providing building permit services	12%	28%	37%	20%	4%	0%
F	Providing building inspection services	9%	24%	41%	24%	2%	0%
G	Promoting economic development	19%	61%	11%	5%	3%	0%
H	Promoting redevelopment	14%	54%	22%	9%	2%	0%
I	Providing business education events	9%	20%	49%	20%	2%	0%
J	Providing business networking events	7%	33%	34%	22%	4%	0%
K	Providing free business consulting services	7%	25%	30%	37%	1%	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%	8%	3%	24%	1%
B	Investigate criminal activity	51%	33%	3%	3%	10%	1%
C	Enforce traffic laws	48%	36%	6%	2%	7%	1%
D	Maintain a low crime rate	66%	27%	3%	1%	3%	1%
E	Provide building permit services	26%	42%	2%	3%	26%	1%
F	Provide building inspection services	32%	39%	2%	1%	24%	1%
G	Promote economic development	36%	44%	6%	3%	10%	1%
H	Promote redevelopment	41%	40%	5%	2%	12%	1%

I	Provide business education events	22%	44%	7%	1%	25%	1%
J	Provide business networking events	28%	43%	6%	1%	21%	1%
K	Provide free business consulting services	17%	38%	7%	2%	37%	1%

**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	9%	39%	38%	13%	1%	0%
B	Enforcing sign regulations	11%	36%	36%	16%	1%	0%
C	Street sweeping	10%	47%	35%	8%	1%	0%
D	Reducing traffic congestion	21%	50%	22%	7%	0%	0%
E	Maintaining local streets and roads	20%	64%	13%	3%	0%	0%
F	Landscaping median strips and other areas of the City	13%	40%	38%	8%	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	37%	38%	3%	3%	18%	0%
B	Enforce sign regulations	39%	42%	3%	6%	11%	0%
C	Provide street sweeping services	49%	40%	2%	2%	7%	0%
D	Reduce traffic congestion	29%	52%	10%	4%	4%	0%
E	Maintain local streets and roads	55%	39%	3%	2%	2%	0%
F	Landscaping median strips and other areas of the City	54%	37%	2%	3%	4%	0%

Section 4: City-Business Communication			
Q11	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	49%
	2	Somewhat satisfied	36%
	3	Somewhat dissatisfied	8%
	4	Very dissatisfied	5%
	98	Not sure	3%
	99	Refused	0%
Q12	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 respondent says Internet or web, probe to see if a City website and, if yes, which one.</i>		
	1	Saddleback Valley News (paper)	8%
	2	Orange County Register (paper)	18%
	3	Los Angeles Times (paper)	1%
	4	The Leaflet - City Newsletter	28%
	5	Leisure Times - City Newsletter	1%
	6	City Newsletter - no mention of Leaflet or Leisure Times	19%
	7	E-newsletter - electronic newsletter	8%
	8	Redevelopment Newsletter / 'A View from the Arbor'	0%
	9	City Council Meetings	5%
	10	Radio	0%
	11	Television	1%
	12	Internet, not a City site	21%
	13	City Website (not specific)	19%
	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	3%
	19	Flyers at City Facilities	1%
	20	Friends / Other People	1%
	21	Other source	6%
	22	Do Not Receive Information about City	4%
	98	Not sure	1%
	99	Refused	0%

Q13 As I read the following ways that the City of Lake Forest can communicate with local businesses, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with your business.					
		Very	Somewhat	Not at all	Not sure/ Refused
	<i>Randomize</i>				
A	Email	59%	24%	14%	3%
B	Electronic Newsletters	44%	37%	17%	2%
C	Twitter	7%	19%	65%	9%
D	Facebook	12%	23%	58%	8%
E	A Smart Phone application that would allow you to communicate with the City, report issues, and receive updates	22%	30%	40%	9%
F	City website	46%	40%	13%	1%
G	A Blog on the City's website	28%	35%	33%	4%
H	Newsletters and other materials mailed directly to your business	60%	31%	6%	3%
I	Automated phone calls	18%	25%	52%	5%
J	Town hall and community meetings	27%	44%	24%	5%
K	Advertisements in local papers	17%	40%	38%	5%
L	Public Access Television	7%	41%	45%	7%
Q14 In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?					
	1	Yes	64%	Ask Q15	
	2	No	36%	Skip to Q16	
	99	Refused	0%	Skip to Q16	
Q15 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	49%		
	2	Somewhat satisfied	42%		
	3	Somewhat dissatisfied	5%		
	4	Very dissatisfied	4%		
	98	Not sure	1%		
	99	Refused	0%		

Q16	Have you ever visited the City's economic development website at <a href="http://www.lakeforestbusiness.com">www.lakeforestbusiness.com</a> ?					
	1	Yes	22%			
	2	No	78%			
	99	Refused	0%			
Q17	The City wants to ensure that the economic development website is relevant and informative. 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	Information on starting a business in Lake Forest		27%	38%	34%	1%
B	Company testimonials		20%	41%	37%	2%
C	Business and Financial Resources Guides		35%	41%	23%	1%
D	Business success stories		31%	47%	21%	1%
E	News stories on grand openings and ribbon-cuttings		32%	51%	16%	1%
F	Shop and Dine directory of local businesses		45%	43%	12%	0%
G	Commercial property for lease or sale		27%	41%	32%	1%
H	Information on business seminars and workshops		35%	48%	16%	0%
Q18	In the past year, do you recall receiving the City's newsletter for local businesses called "In Business"? It is published twice per year.					
	1	Yes	40%			
	2	No	60%			
	99	Refused	0%			
Q19	The City wants to ensure that the <i>In Business</i> newsletter is relevant and informative. 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		52%	38%	9%	1%
B	Profiles of local companies		35%	52%	12%	1%
C	Market information		44%	38%	17%	1%
D	Interviews with CEO's		18%	52%	29%	1%
E	Business tips from local businesses		32%	52%	16%	1%



Q20	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. Verbatim responses recorded and later grouped into categories shown below.</i>				
	Not sure / Cannot think of any topics	77%			
	Business management, growth	5%			
	Planning, future projects, businesses	4%			
	Financial, economic info	4%			
	Calendar of events / Community services	3%			
	Traffic, construction updates	3%			
	Networking opportunities	2%			
	Residential, housing info	1%			
	Home-based business info	1%			
Q21	The City of Lake Forest also hosts 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	16%	28%	55%	1%
B	Understanding business finance	18%	29%	52%	1%
C	Business job fair and expo	23%	39%	36%	2%
D	Payroll and tax reporting requirements	19%	22%	58%	1%
E	Business marketing and sales	29%	33%	36%	2%
F	Business legal issues	21%	43%	35%	1%
G	Business networking events	32%	37%	30%	1%
H	Roundtable discussion on specific topics	20%	45%	34%	1%
Q22	Prior to taking this survey, were you aware that there is a Lake Forest Chamber of Commerce?				
	1	Yes	89%		
	2	No	11%		
	99	Refused	0%		

Q23	I'm going to read you a sentence, and I'd like you to finish it for me. Here is the sentence: What my business would find most beneficial from the Lake Forest Chamber of Commerce is: _____. Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of anything	45%
	Advertising, promotional marketing opportunities	17%
	Networking, business opportunities	15%
	Forum for discussing business environment, issues in City	5%
	Improved laws, regulations for businesses	4%
	Assistance finding potential customers, clients	2%
	Affordable rent, lease spaces	1%
	Improved connection between residents, local businesses	1%

#### Section 5: Background & Demographics

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

D1	How many people are currently employed at your worksite in Lake Forest?	
	1	21%
	2 to 5	37%
	6 to 10	13%
	More than 10	27%
D2	Approximately how many of these employees live outside of Lake Forest?	
	None	27%
	1	11%
	2 to 5	28%
	6 to 10	11%
	More than 10	20%

D3	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	2%
	3	Proximity to freeways/transportation corridors	13%
	4	Quality of housing stock	3%
	5	Overall quality of the City	14%
	6	Local amenities (dining/shopping)	5%
	7	Close to clients/customers	10%
	8	Close to owner's home	26%
	9	Other factor (unique responses)	16%
	98	Not sure	6%
	99	Refused	0%
D4	In the next 12 months, do you think your business will increase, decrease or stay about the same?		
	1	Increase	60% Ask D5
	2	Decrease	2% Skip to 0
	3	Stay about the same	35% Skip to 0
	98	Not sure	3% Skip to 0
	99	Refused	0% Skip to 0
D5	To accommodate the growth in your business, will you require additional square footage or a larger building?		
	1	Yes	30%
	2	No	67%
	98	Not sure	3%
	99	Refused	0%

D6	In the next 12 months, do you think your business will relocate?			
	1	Yes	10%	Ask D7
	2	No	81%	Skip to D9
	98	Not sure	9%	Skip to D9
	99	Refused	0%	Skip to D9
D7	Will you be relocating your business within Lake Forest or to another community?			
	1	Lake Forest	20%	Skip to D9
	2	Another community	31%	Ask D8
	98	Not sure	49%	Skip to D9
	99	Refused	0%	Skip to D9
D8	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 5 respondents on file	
D9	Last question for you. Are you a resident of Lake Forest?			
	1	Yes	47%	
	2	No	53%	
	99	Refused	0%	
Thank you for participating! This survey was conducted for the City of Lake Forest.				

#### Section 6: Post-Interview & Sample Items

S1	Gender ( <i>Determined by voice of respondent</i> )		
	1	Male	64%
	2	Female	36%

S2	Sample Subgroup (weighted responses shown)		
	1	C-FR	6%
	2	C-Southwest	13%
	3	C-Midcity	12%
	4	C-RDA	8%
	5	Homeoccs	27%
	6	I-AspanLambert	5%
	7	I-Midcity	3%
	8	I-FRPH	10%
	9	I-RDA	1%
	10	Office	13%
	11	Other	3%