

COMMUNITY SATISFACTION STUDY
REPORT ON SURVEYS OF RESIDENTS & BUSINESSES

PREPARED FOR THE
CITY OF LAKE FOREST



DECEMBER 18, 2012



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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 Economic Development/Community Preservation.

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.

This study is not the first statistically reliable resident and business ‘satisfaction’ study conducted for the City. Similar studies have been conducted every two years since 1998. 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 73). In brief, a total of 400 randomly selected Lake Forest residents who are registered to vote participated in the resident survey between September 27 and October 2, 2012. 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 21 minutes in length. The 18-minute survey of business managers was administered to a stratified random sample of 200 local business owners and managers between November 2 and November 29, 2012. Data collection was suspended for the Thanksgiving holiday.

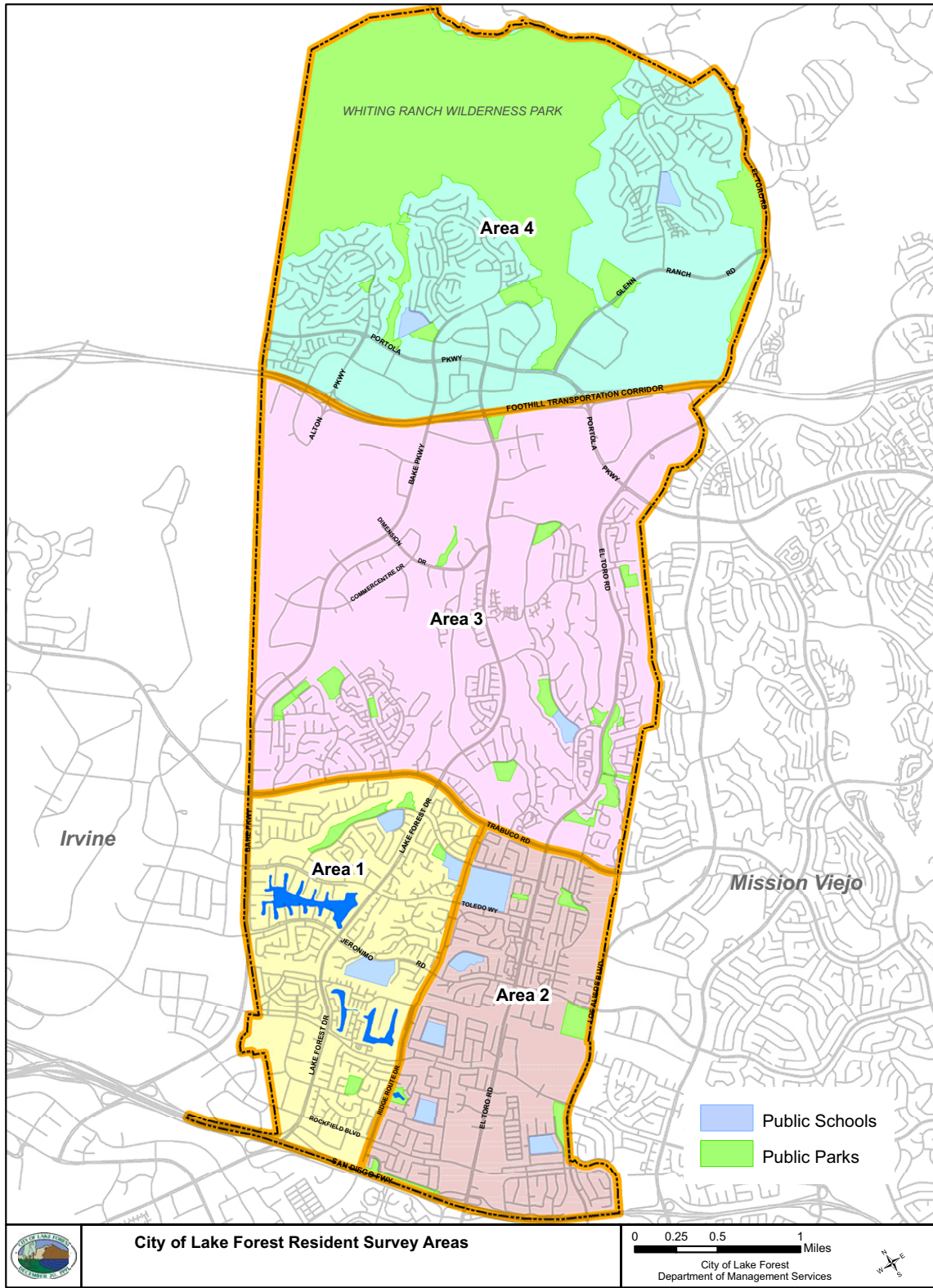
STATISTICAL SIGNIFICANCE As noted above, many of the figures and tables in this report present the results of questions asked in 2012 alongside the results found in previous surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify 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 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 surveys 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 800 survey research studies for public agencies, including more than 300 studies for California municipalities and special districts.



JUST THE FACTS

The following is an outline of the main factual findings from the 2012 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

- The vast majority of respondents shared very favorable opinions of the quality of life in Lake Forest, with 55% reporting it is excellent, 42% good. Only 3% said it is fair, and fewer than 1% 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 compared with surrounding areas, 29% reported that it is excellent, 59% stated it is good, and 8% 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 asked to indicate one thing city government could change to improve Lake Forest, more than one-third (36%) of residents surveyed indicated they desired no changes from the City (23%) or were unsure of a change that would make Lake Forest a better place to live (13%). Of the remaining specific suggestions, the most common were improving parks and recreation opportunities (13%), reducing traffic congestion (11%), improving and repairing City infrastructure (6%), and improving public safety (5%).
- When asked about what the City could do to improve the business climate in Lake Forest, nearly half (47%) of business managers surveyed were either unsure of a change that could be made (24%) or indicated that no changes were needed (23%). Specific suggestions for improving the business climate included increasing business and networking opportunities (15%), reducing signage restrictions (14%), reducing taxes and fees (6%), and improving or providing additional parking for customers (5%).
- Approximately one-third (34%) 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 specific aspects that were mentioned, access to other local businesses and services (21%), having a convenient, easily-accessible location within the City (18%), proximity to local freeways and surrounding areas of interest (13%), and Lake Forest's sense of community (12%) were mentioned most often.
- An overwhelming majority of residents (95%) and businesses (92%) stated that, overall, they were satisfied with the City's efforts to provide municipal services.

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 (93%), and preparing for emergencies (84%). 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 by the Department (59%), followed by enforcing zoning regulations (52%), issuing building permits (51%), and enforcing sign regulations (42%). Residents were similarly satisfied (90% 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**, providing garbage collection services was viewed as the most important service (90%), followed by maintaining local streets and roads (89%), reducing traffic congestion (84%), maintaining parks and picnic areas (80%), and preventing storm-water pollution (79%). Residents were most satisfied with the Department's efforts to provide garbage collection service (98%), maintain parks and picnic areas (97%), and prevent storm-water pollution (96%).
- Nearly three-quarters (74%) of respondents indicated their household has a great (38%) or moderate (35%) need for recycling all types of plastics. A smaller but considerable percentage indicated a need for recycling food waste (54%) and household batteries (47%).
- Among the services provided by the **Community Services Department**, residents assigned the highest importance to providing recreation programs for special needs children (72%), followed by providing after school recreation programs (69%), providing recreation and sports programs for elementary school-aged children (68%), and providing recreational and sports programs for teens (66%). Residents expressed the greatest levels of satisfaction with respect to the Department's efforts to provide special events like concerts in the park and the Fourth of July Parade (95%), followed by recreation programs for seniors (94%) and summer-specific recreation programs such as camps (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 as the most important of the services tested (96%), followed by investigating criminal activity (87%) and promoting economic development (77%). At the top of the satisfaction scale was maintaining a low crime rate (97%), investigating criminal activity (95%), and revitalizing out-dated areas in the City (95%).
- Among the **infrastructure-related services** provided by the City to local businesses, the business community rated maintaining local streets and roads as most important (90%), followed by reducing traffic congestion (80%), landscaping median strips and other areas of the City (63%), and street sweeping (61%). Overall, satisfaction was greatest with respect to the City's efforts to landscape median strips and other areas of the City (98%), maintain local streets and roads (98%), and provide street sweeping services (97%).
- Less than one-quarter (21%) of business managers were aware of the State of California's newly passed law requiring businesses that throw away at least four cubic yards of trash per week to have a recycling program.
- Eighty-six percent (86%) of applicable businesses indicated that receiving reduced trash rates for recycling would be very (62%) or somewhat (24%) helpful. More than three-quarters of applicable businesses also rated assistance with adapting trash enclosures to allow recycling (82%) and free assistance with ways to reduce trash bills by recycling (76%) as very or somewhat helpful if offered by the City.

CIVIC CENTER PROGRAMMING

- The highest-rated priority for the new Civic Center was a senior center (85% high or medium priority), followed by general purpose rooms that can be used for meetings, conferences, and classes (82%), and special purpose rooms that can be used for activities like arts and crafts, dance, and aerobics (77%). A performing arts center that will host concerts and plays (75%), a community policing center (74%), and a computer lab for drop-in and classroom use (72%) were also popular amenities.

CODE ENFORCEMENT

- Among residents, 28% 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 (38%) or somewhat (20%) satisfied with the City's code enforcement efforts.
- Just under half (46%) of respondents who were dissatisfied with the City's code enforcement efforts attributed their dissatisfaction to parking-related issues. Other specific mentions included homes with multiple families (10%) and unkempt houses and yards (10%).
- Residents who mentioned parking as the reason for their dissatisfaction were asked to provide more detail about the parking issue of concern. The most frequently mentioned parking issue was households having too many cars parked on the street (45%), followed by cars parked on the street for long periods of time without moving (28%), and the general concern of residents parking their cars on the street instead of using private driveways and garages (20%).

COMMUNICATION

- Overall, 81% of residents indicated that they were either very (52%) or somewhat (29%) satisfied with the City's communication efforts.
- Overall, 84% of local businesses indicated that they were satisfied with the City's efforts to communicate with them through newsletters, the Internet, social media, and other means.
- The most frequently cited source of information for City news among residents in 2012 was the City's newsletter, mentioned by name (*The Leaflet*) by 39% of respondents and referred to in general (the City's newsletter) by an additional 20% of residents. Other sources mentioned by at least 10% of residents included the Internet in general (21%), the City's website in general (15%), and the *Orange County Register* (11%).
- Members of the business community were most likely to mention the City's newsletter—generally (25%) and by its name *The Leaflet* (24%)—when asked what information sources they rely on for Lake Forest news, information, and programming. Other commonly mentioned sources included the City's website in general (24%), the Internet in general (18%), the City's electronic newsletter (14%), and the *Orange County Register* (11%).
- Three-quarters (75%) of residents indicated that they access information online primarily via a computer, 12% using a smart phone, and 8% using a tablet. The remaining respondents indicated that either they do not have online access (4%) or they were unsure of their primary method (2%).
- Lake Forest businesses indicated that direct mail to their office was the most effective method (89% very or somewhat effective), followed by the City's website (88%), and email (88%).
- Sixty-one percent (61%) of residents 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 91% of residents surveyed indicating that they were satisfied with the resources available on the sites.
- Seven percent (7%) of residents surveyed indicated that they had visited the City's Facebook page in the past year.
- Overall, residents indicated that newsletters mailed directly to their home was the most effective method for the City to communicate with them (88% very or somewhat effective), followed by the City website (84%), email (77%), and electronic newsletters (77%).

- More than one-third (35%) of local businesses indicated that they had visited the City of Lake Forest's economic development website (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 news stories on grand openings and ribbon-cuttings (80% very or somewhat interested), followed by a Shop and Dine directory of local businesses (79%) and Business and Financial Resource Guides (78%).
- Thirty-five percent (35%) 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 most interest in updates on City projects (87%), market information (84%), and profiles of local companies (82%).
- Nearly all (94%) of business respondents desired no additional information topics in the *In Business* newsletter.
- When asked about their levels of interest in attending workshops and seminars, Lake Forest businesses expressed the greatest interest in attending business marketing and sales workshops (72% very or somewhat interested), followed by workshops pertaining to business and networking (72%) and business legal issues (72%).

INFORMED TOP ISSUE

- Near the end of the resident and business surveys, respondents were asked to identify any issues that they would most like the City to focus on during the next two years. In both cases the most common response was 'No issues / Everything is fine', mentioned by 40% of residents and 57% of business managers.
- Top specific issues cited among residents included traffic congestion (10%), public safety (10%), cleanliness and beautification (7%), and infrastructure maintenance (5%).
- Top specific issues cited among the business community included improving marketing, networking, and advertising opportunities (13%), economic growth and development (8%), traffic congestion (6%), and reducing taxes and fees (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 (25%) indicated that it is close to the owner's home. Another 15% of respondents could not provide a response to this question, as the business was already in place when they became affiliated with it. Other specific reasons included the business' proximity to freeways and surrounding communities (19%), proximity to clients and potential customers (9%), competitive lease rates (9%), and the overall quality of the City (8%).
- Local businesses were generally optimistic about their future growth, with 55% anticipating growth and 39% expecting that their business would remain about the same. Just 5% indicated that they expect their business to decrease in the coming year.
- Of the 8% of businesses that anticipated relocating in the next year, approximately half (4%) expected to relocate to another community.



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 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?

Over the past dozen years, 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 2012 survey demonstrate that Lake Forest residents and businesses recognize and appreciate the City's commitment to aligning its efforts with their priorities and needs. Through its strategic use of customer feedback and resource allocation, the City has managed to continually improve its performance over time. The result of these efforts is that 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. Not only has the overall satisfaction level increased during the past decade to 95% for residents and 92% for businesses, the *intensity* of satisfaction has also improved significantly. The percentage of residents who indicated that they were *very* satisfied with the City's overall performance has increased from 45% in 2000 to 63% in 2012. The business community has displayed similar gains, with 40% of business managers indicating they were very satisfied with the City's overall performance in 2000, which has increased fairly steadily to 57% in 2012.

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 50 services tested between the two surveys, the City is meeting the needs of *at least* 80% of residents and businesses, and for the majority of the services the City is meeting the needs of more than 90% of residents and businesses. Additionally, in the past two years all of the statistically significant changes in the City's performance have been positive, including increased satisfaction with one of Southern California's most pressing issues: reducing traffic congestion.

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 with more than 200 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 all residents surveyed (96%) rated the quality of life in the City as excellent or good, and roughly nine out of ten businesses rated Lake Forest's business climate favorably when compared with neighboring areas.

Another indicator of a well-managed City meeting the needs of its residents and local businesses is that when asked to indicate one thing that city government could do to make Lake Forest a better place to live or to improve the business climate, the most common response from residents and businesses was either a request that the City continue what it is already doing (i.e., no changes), or a shrug of the shoulders (i.e., not sure). This finding was underscored by the responses to a question moved to the *end* of both surveys in 2012, which asked respondents—who had just spent approximately 20 minutes thinking and talking about a wide variety of city services and programs—if there was an issue they would like the City to focus on in the next two years. By far the most typical response, once again, was that there were no particular issues of concern.

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 discussed in this section and noted elsewhere throughout this report, respondents were largely pleased with the City's efforts to provide services, programs, 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 Lake Forest continues to strive for improvement, however, the results of this study do suggest opportunities to further bolster community satisfaction and continue its positive trends with respect to specific program and service provision. Considering respondents' verbatim responses regarding what they feel city government could do to make Lake Forest a better place to live (see *Ways to Improve Lake Forest* on page 16) and, near the completion of the survey, issues they would most like city government to address during the next two years (see *Informed Top Issue* on page 66), as well as the list of services and their respective priority status for future city attention (see *Performance Needs & Priorities* on page 39), the top priorities for residents are reducing traffic congestion, providing parks and recreation services and programs, which includes those for special needs children, adults, and teens, and improving public safety, which includes neighborhood watch programs. For local businesses, the top priorities are reducing traffic congestion, supporting business community networking and business growth opportunities, promoting economic development, addressing signage regulations, and providing business watch programs.

With the recommendation that the City continue to focus on these areas, it is equally important to stress that when it comes to improving satisfaction in service areas, the appropriate strategy is often 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 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 the City's many efforts to communicate with its residents and local business community include its newsletters, timely press releases, street banners, Facebook presence, and its various websites.

The aforementioned recommendations regarding public information notwithstanding, it should be recognized that the City of Lake Forest continues to do a commendable 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—and have been for the past dozen years—among the highest that True North has encountered.

A high level of satisfaction with a city's communication efforts is generally associated with and likely caused by a greater reliance among residents on *city-sponsored* sources of information such as newsletters, websites, and related publications. 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. For example, between 2000 and 2012 resident use of the City's websites increased from 18% to 61%. A substantial percentage of businesses are also now utilizing the City's economic development website, up from 22% in 2010 to 35% in 2012. The high penetration of the City's newsletter and the high usage rates for the City's websites are undoubtedly some 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 and residents requires that the City be forward-looking in its communications and services. Fortunately, the 2012 survey provides some guidance in this respect. For the economic development website, local businesses were most interested in news stories on grand openings and ribbon-cuttings, a Shop and Dine directory of local businesses, and Business and Financial Resource Guides. For the *In Business* newsletter, topics of interest included updates on City projects and market information. And, among potential events that the City could host, businesses were most interested in attending workshops for business marketing and sales, networking, and legal issues.

Finally, it is worth noting that communication preferences are certain to vary according to the topic at hand and thus the particular demographic of interest. For example, when communicating a piece of information that pertains to the community as a whole, such as public safety efforts, a medium that reaches and appeals to a broad range of residents may be the most effective method. However, as the topic becomes more specifically targeted, so too should the method of dissemination. For example, informing residents about a recreation or community event that is likely to appeal to younger adult residents might be better accomplished with one or more forms of electronic distribution, such as email and social media such as Twitter and Facebook (see Table 16 on page 59 for a look at how resident communication preferences differ between age groups, and Table 15 on page 55 to see how different business types prefer to receive communications).

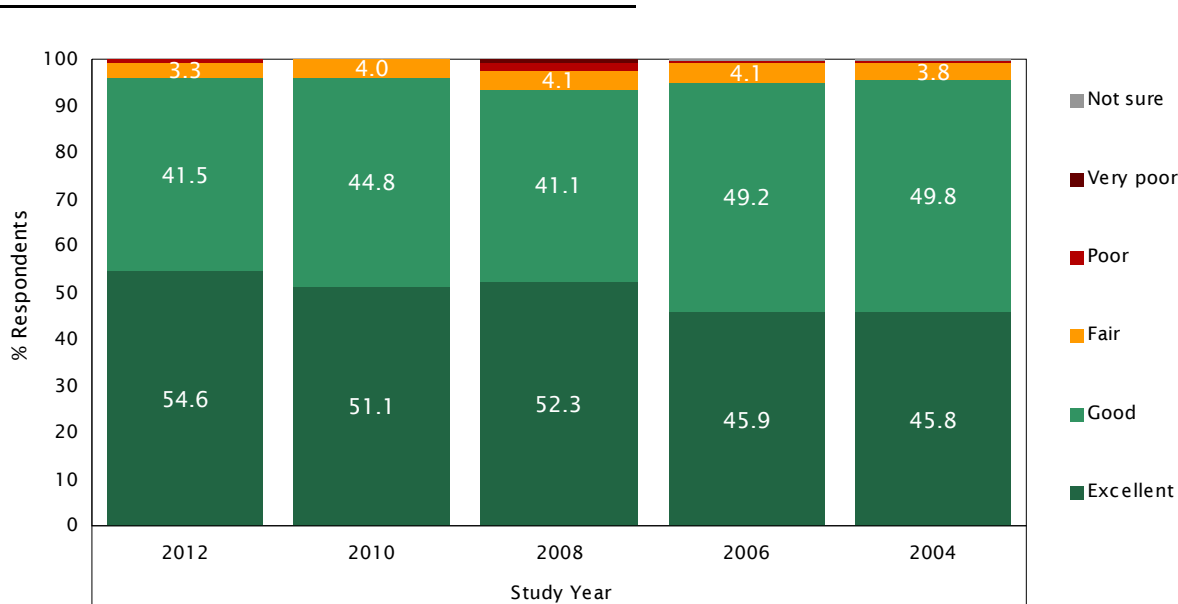
GENERAL PERCEPTIONS OF CITY & LOCAL ISSUES

The opening series of questions in the resident and business surveys were designed to gather top-of-mind perceptions about the quality of life in Lake Forest and the business climate, residents and business managers' satisfaction with the City's overall performance, as well as their ideas for what city government could do to improve the quality of life and improve the business climate in the City.

QUALITY OF LIFE At the outset of the resident survey, respondents were asked 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 2, the vast majority of respondents shared very favorable opinions of the quality of life in Lake Forest, with 55% reporting it is excellent and 42% good. Only 3% said it is fair, and fewer than 1% said that the quality of life in Lake Forest is poor or very poor. There were no statistically significant changes from the 2010 study.

Question 2: 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 2 OVERALL QUALITY OF LIFE (2012 ~ 2004)



For the interested reader, Figures 3 and 4 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, 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 3 OVERALL QUALITY OF LIFE BY YEARS IN LAKE FOREST AREA, CHILD IN HOME, HOUSEHOLD INCOME & GENDER

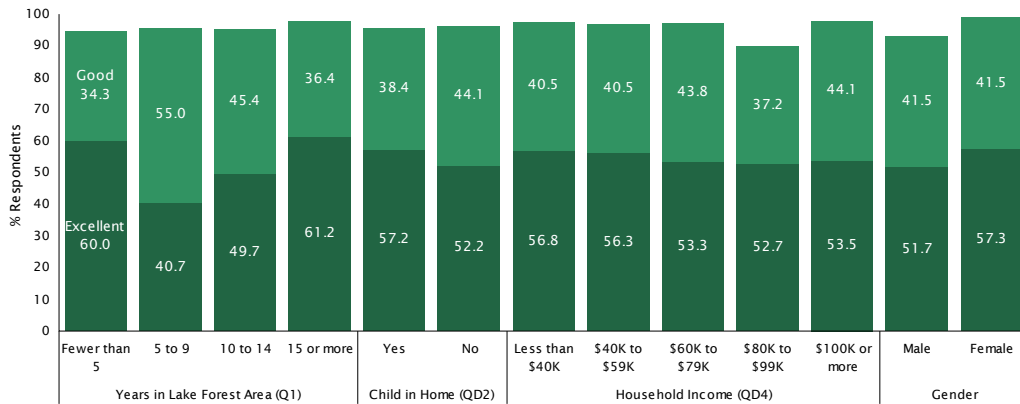
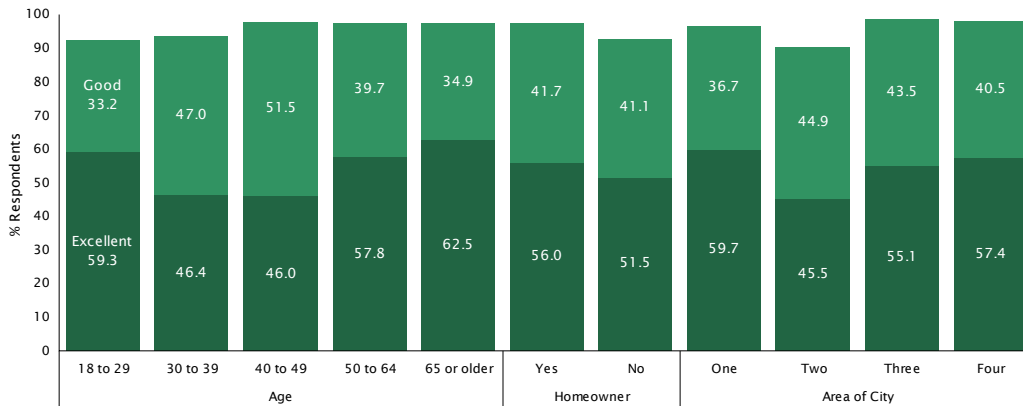


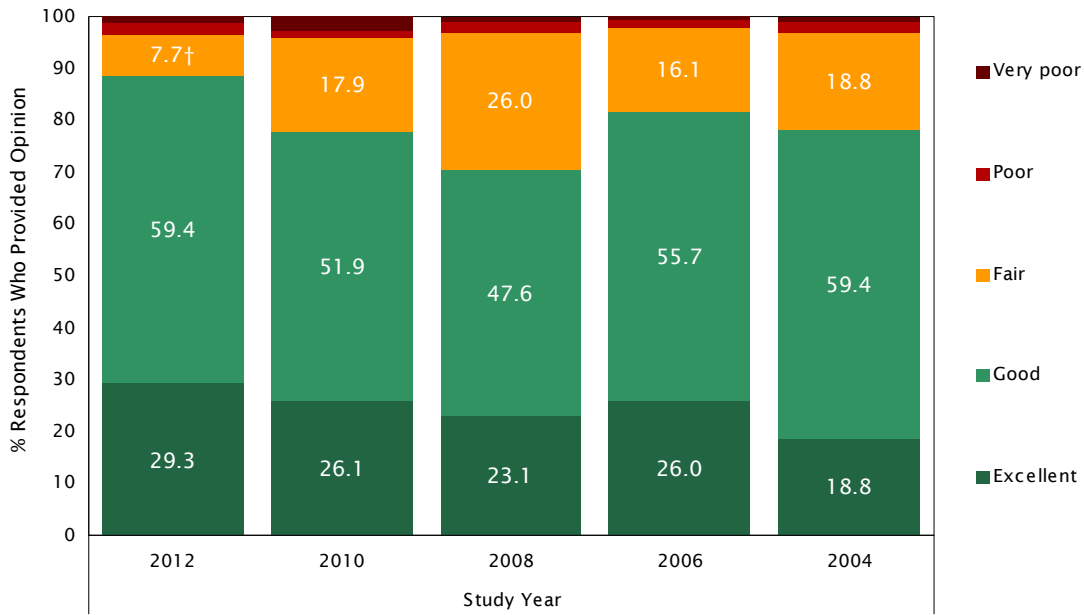
FIGURE 4 OVERALL QUALITY OF LIFE BY AGE, HOME OWNER & AREA OF CITY



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 5 on the next page, most respondents shared a favorable opinion of Lake Forest’s business climate. Overall, 29% reported that it is excellent, 59% stated it is good, and 8% 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 with 2010, the 2012 opinions of the business climate in Lake Forest were more favorable, with a statistically significant decrease in the percentage who cited it as only fair. This change, which continues a trend identified in 2010, likely reflects a general perception that the economy is on a path of recovery from the recession.

Question 2: 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 5 QUALITY OF BUSINESS CLIMATE (2012 ~ 2004)



Figures 6 and 7 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 6 QUALITY OF BUSINESS CLIMATE BY YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY

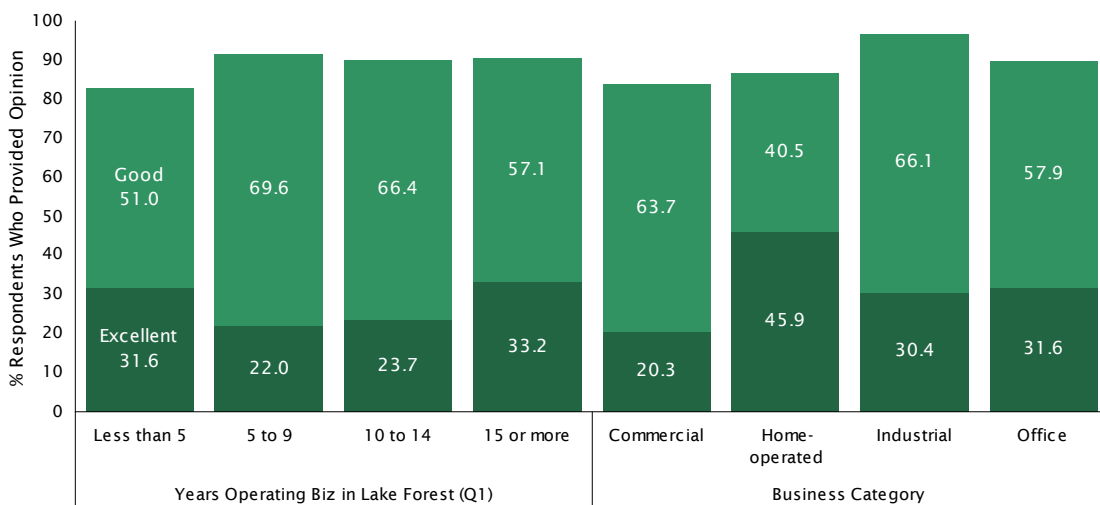
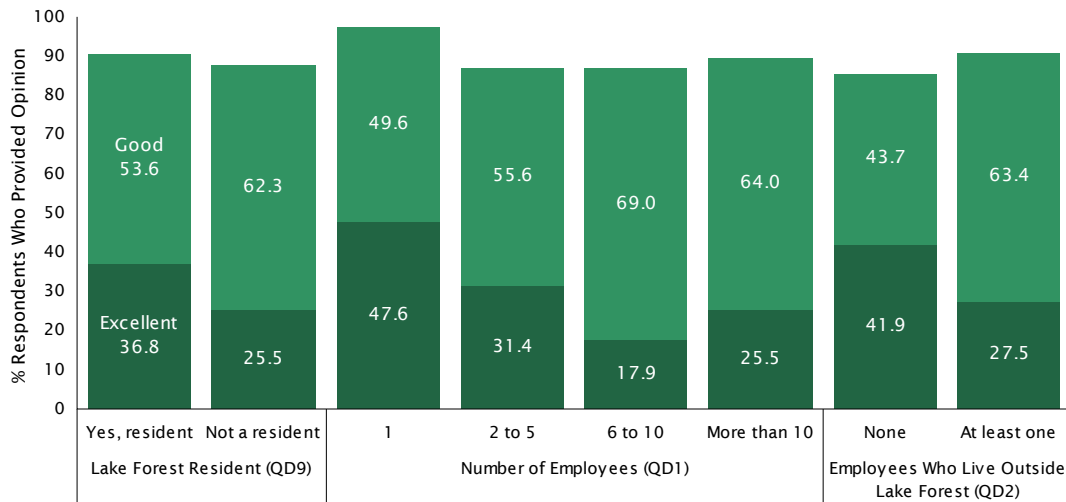


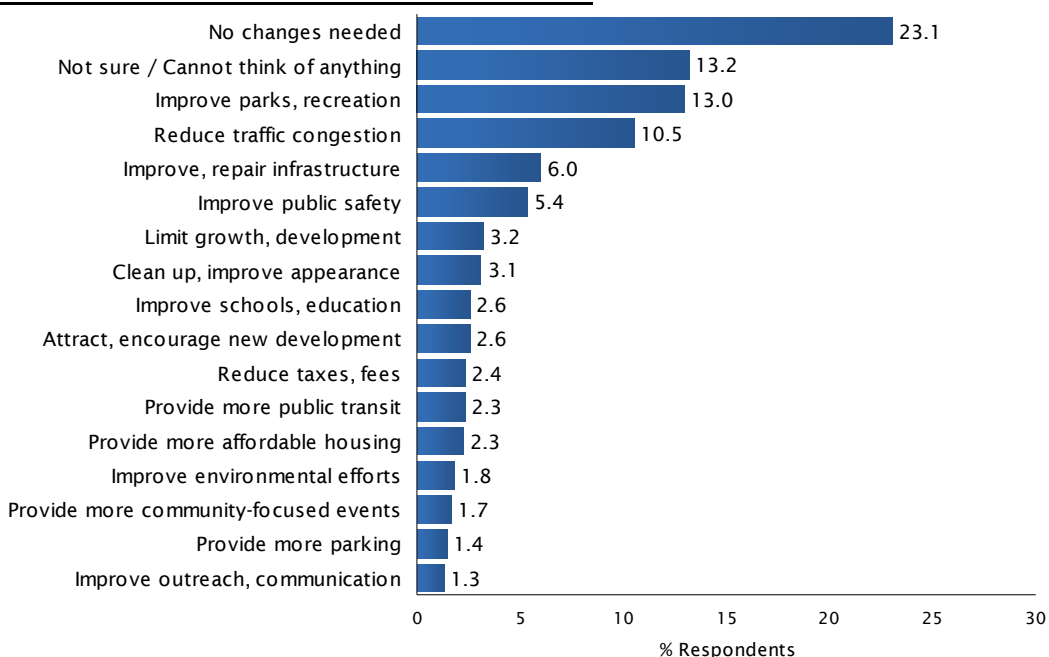
FIGURE 7 QUALITY OF BUSINESS CLIMATE BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST



WAYS TO IMPROVE LAKE FOREST Residents and business managers were next asked to indicate one thing city government could change to improve Lake Forest. For residents, the question focused on improving the City as a place to live, now and in the future. Business managers were asked more specifically about ways to improve the business climate. These questions were asked in an open-ended manner, allowing respondents to mention any change that came to mind without being prompted by or restricted to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in the next two figures.

Question 3: Resident Survey *If the city government could do one thing to make Lake Forest a better place to live now and in the future, what would you like to see?*

FIGURE 8 CHANGES TO IMPROVE CITY

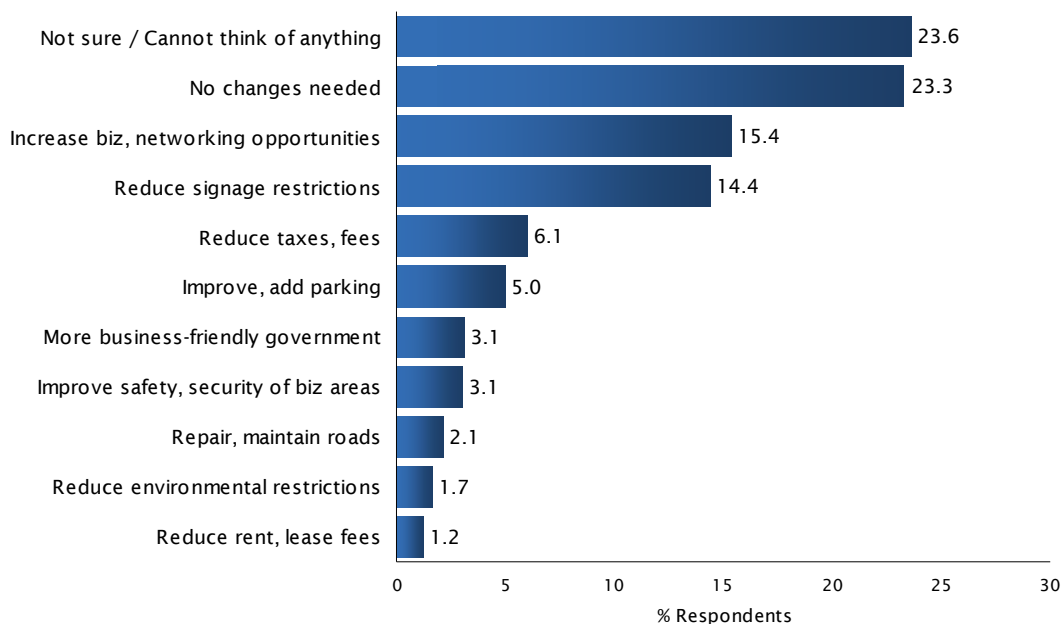


As presented in Figure 8 on the previous page, more than one-third (36%) of residents surveyed indicated they desired no changes from the City (23%) or were unsure of a change that would make Lake Forest a better place to live (13%). Of the remaining specific suggestions, the most common were improving parks and recreation opportunities (13%), reducing traffic congestion (11%), improving and repairing City infrastructure (6%), and improving public safety (5%). No other single improvement was mentioned by at least 5% of respondents.

When asked about what the City could do to improve the business climate in Lake Forest, nearly half (47%) of business managers surveyed were either unsure of a change that could be made (24%) or indicated that no changes were needed (23%). Specific suggestions for improving the business climate included increasing business and networking opportunities (15%), reducing signage restrictions (14%), reducing taxes and fees (6%), and improving or providing additional parking for customers (5%). No other improvement was mentioned by at least 5% of respondents.

Question 3: Business Survey *If the city government could do one thing to improve the business climate in Lake Forest, what would you like to see?*

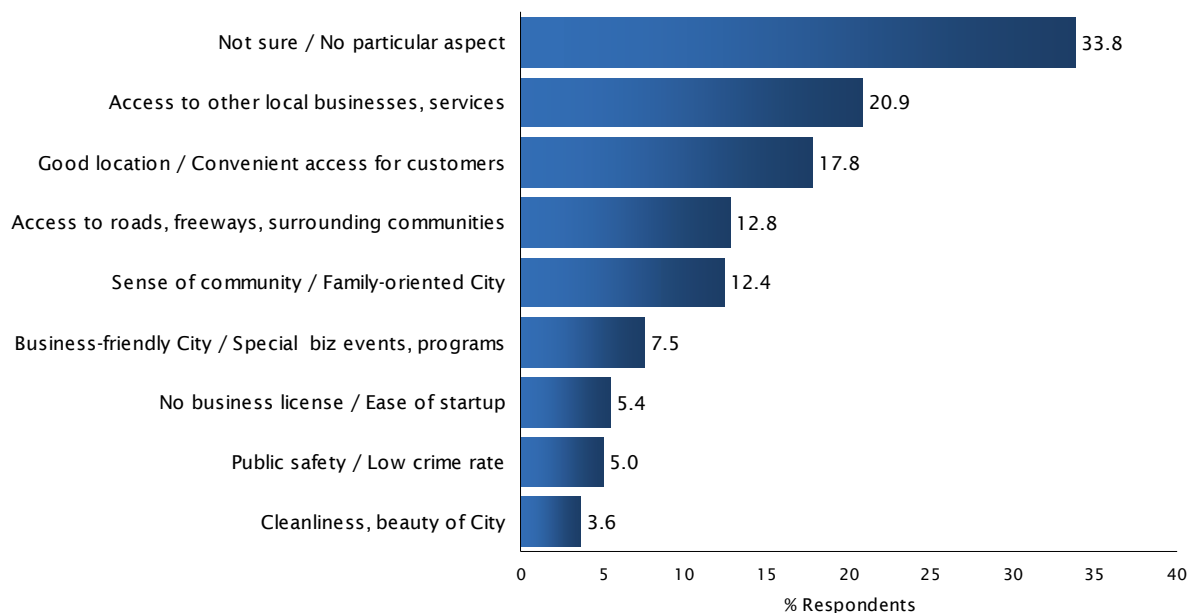
FIGURE 9 CHANGES TO IMPROVE BUSINESS CLIMATE



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 also posed in an open-ended manner, allowing respondents to mention any aspect that came to mind without being prompted by or limited to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 10.

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

FIGURE 10 ASPECTS OF CITY MOST BENEFICIAL TO BUSINESS



The most common response 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 (34%). Among specific aspects that were mentioned, access to other local businesses and services (21%), having a convenient, easily-accessible location within the City (18%), proximity to local freeways and surrounding areas of interest (13%), and Lake Forest’s sense of community (12%) were mentioned most often.

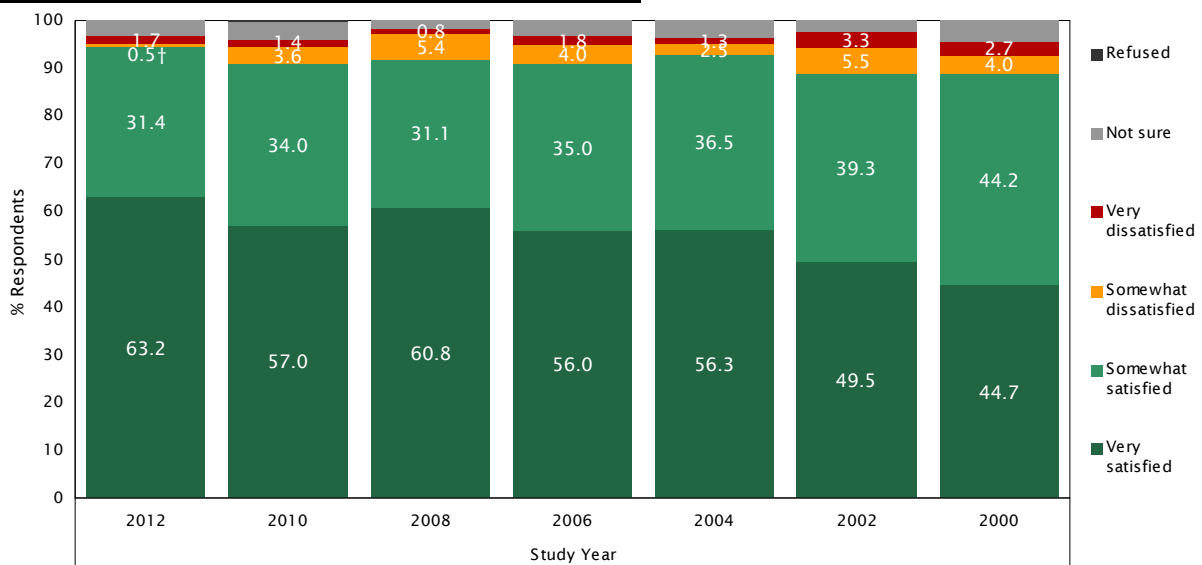
OVERALL PERFORMANCE RATING Both residents and businesses were asked to rate the job the City of Lake Forest is doing to provide municipal services. Because this question does not reference a specific program, facility, or service and requested that the respondent consider the City’s performance in general,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

Figure 11 on the next page presents the results to this question for the resident survey for 2012 and for prior surveys dating back to 2000, whereas Figure 14 on page 20 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, 95% of residents and 92% of local businesses in 2012 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 63% among residents and from 40% to 57% among businesses between 2000 and 2012. Aside from these overall trends, worth noting is the statistically significant decrease from the prior study in the percentage of residents that reported being *somewhat* dissatisfied with the City’s overall performance, from 4% to just 1% (see Figure 11).

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 11 OVERALL SATISFACTION: RESIDENT SURVEY (2012 ~ 2000)



† Statistically significant change ($p < 0.05$) between the 2010 and 2012 studies.

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

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

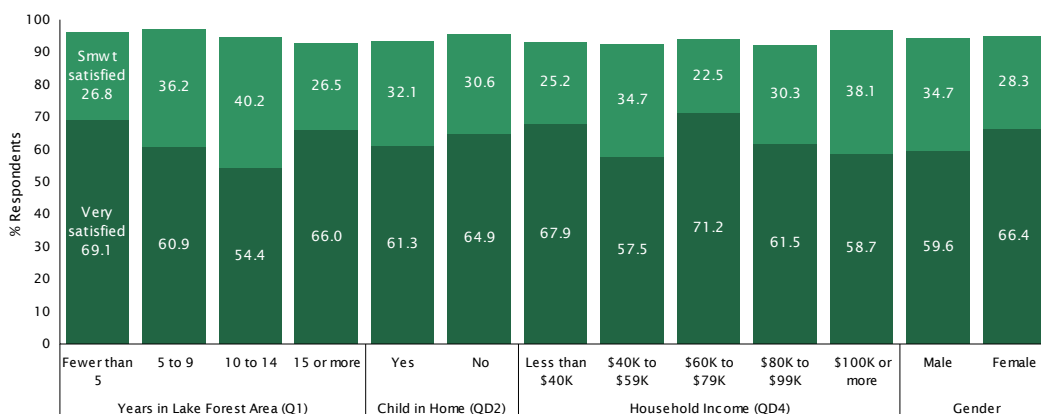
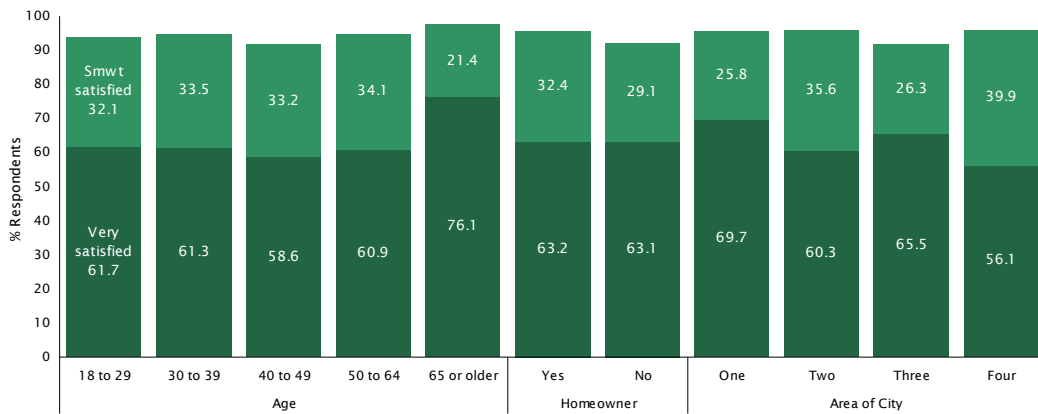


FIGURE 13 OVERALL SATISFACTION: RESIDENT SURVEY BY AGE, HOME OWNER & AREA OF CITY



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 14 OVERALL SATISFACTION: BUSINESS SURVEY (2012 ~ 2000)

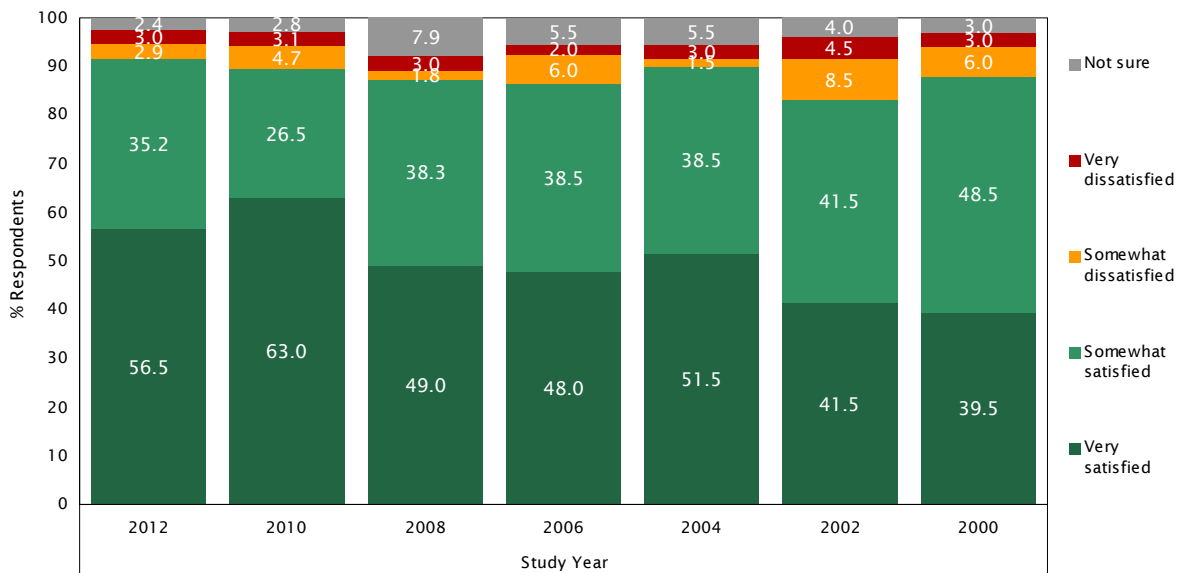


FIGURE 15 OVERALL SATISFACTION: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY

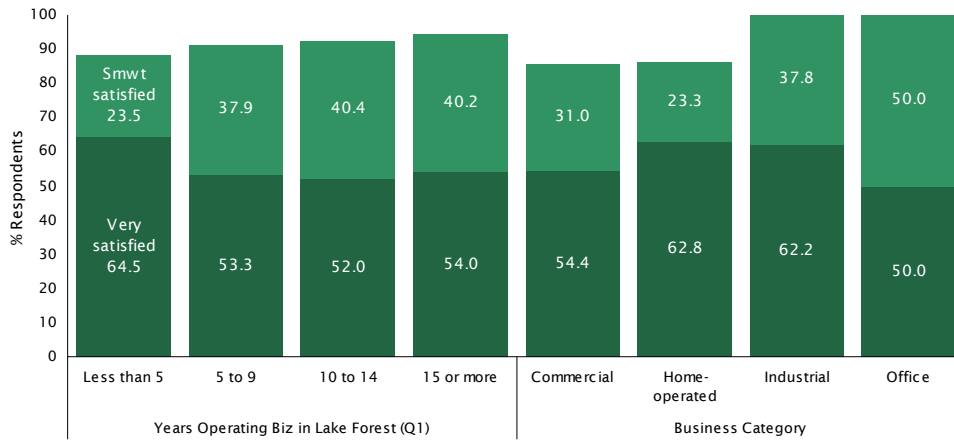
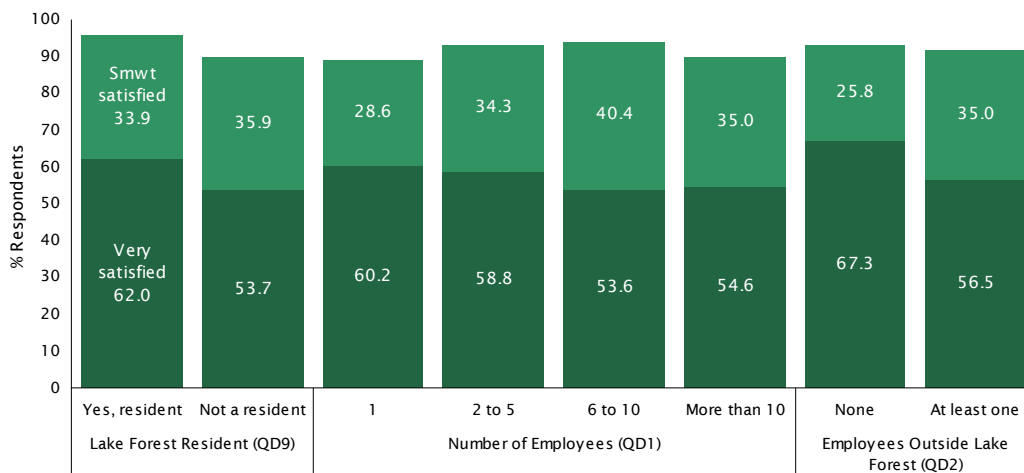


FIGURE 16 OVERALL SATISFACTION: BUSINESS SURVEY BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST



SPECIFIC SERVICES: RESIDENT SURVEY

Whereas Question 4 of the resident survey 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; results for the business survey are discussed in the next section.

POLICE SERVICES Figure 17 presents the services provided by the Police Department sorted in order of importance according to the percentage 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 (93%), and preparing for emergencies (84%). At the other end of the spectrum, providing animal control services (44%) and providing neighborhood watch programs (59%) were viewed as less important. Table 1 displays the percentage of respondents who viewed each service as extremely or very important for 2012 and 2010, as well as the difference between the two studies. There were no statistically significant differences.

Question 5: 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 17 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY

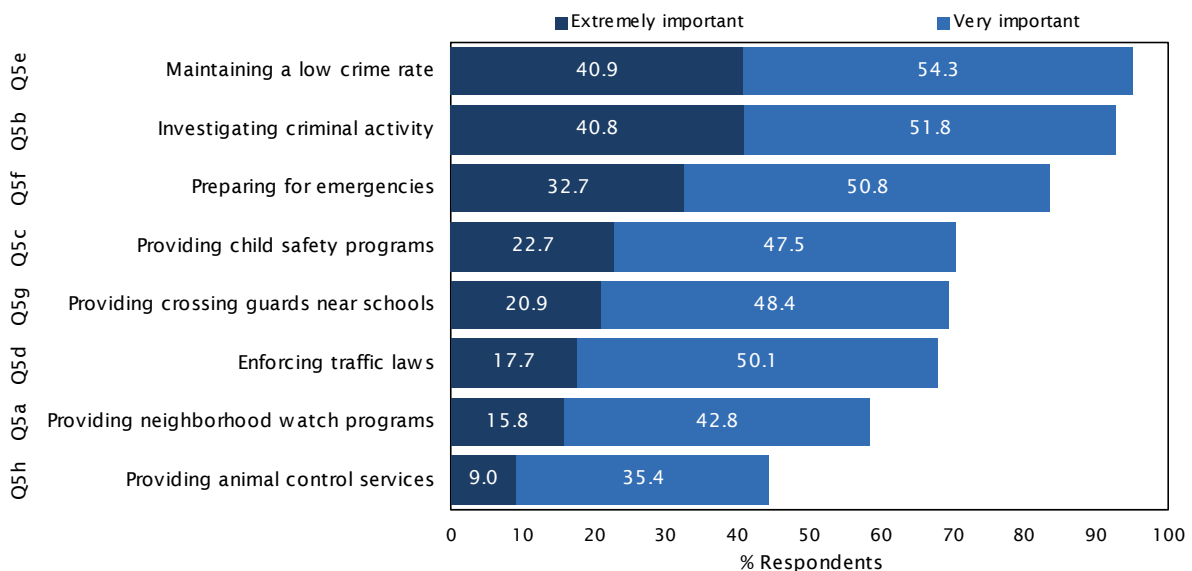


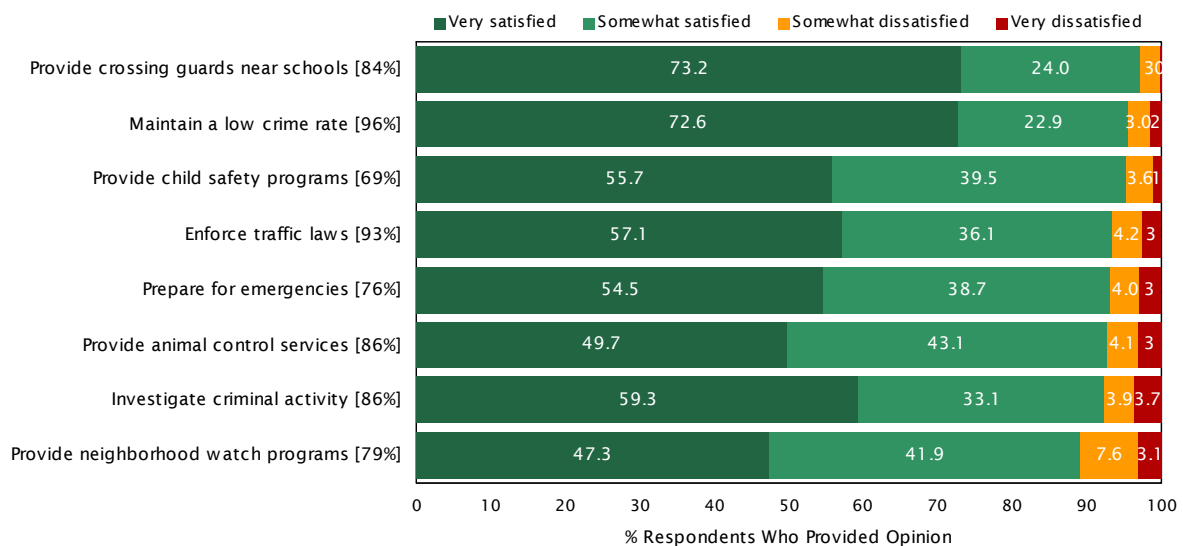
TABLE 1 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY (2012 ~ 2010)

| | Study Year | | Change in Extremely + Very Important |
|--|------------|------|--------------------------------------|
| | 2012 | 2010 | |
| Providing child safety programs | 70.2 | 65.6 | +4.6 |
| Preparing for emergencies | 83.5 | 79.4 | +4.1 |
| Enforcing traffic laws | 67.8 | 64.3 | +3.5 |
| Providing animal control services | 44.5 | 41.3 | +3.2 |
| Providing crossing guards near schools | 69.3 | 68.7 | +0.6 |
| Investigating criminal activity | 92.6 | 92.2 | +0.4 |
| Maintaining a low crime rate | 95.2 | 95.1 | +0.0 |
| Providing neighborhood watch programs | 58.6 | 62.5 | -4.0 |

Turning to the satisfaction component, Figure 18 sorts the same list of services according to the percentage 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 18. 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 brackets. Thus, for example, among the 84% 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 6: 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 18 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY¹



1. 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 brackets. Thus, for example, among the 84% 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.

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 2 shows how the 2012 results compared with the prior 2010 study. There were no statistically significant changes during this period.

TABLE 2 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY (2012 ~ 2010)

| | Study Year | | Change in Satisfaction |
|--------------------------------------|------------|------|------------------------|
| | 2012 | 2010 | |
| Provide animal control services | 92.8 | 88.4 | +4.4 |
| Provide neighborhood watch programs | 89.2 | 85.5 | +3.7 |
| Enforce traffic laws | 93.2 | 92.1 | +1.1 |
| Prepare for emergencies | 93.2 | 92.5 | +0.7 |
| Provide child safety programs | 95.2 | 94.6 | +0.7 |
| Provide crossing guards near schools | 97.2 | 97.1 | +0.0 |
| Maintain a low crime rate | 95.5 | 95.7 | -0.2 |
| Investigate criminal activity | 92.4 | 93.9 | -1.5 |

DEVELOPMENT SERVICES DEPARTMENT Figure 19 presents the services provided by the Development Services Department sorted by order of importance according to the percentage 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 (59%), followed by enforcing zoning regulations (52%), issuing building permits (51%), and enforcing sign regulations (42%). When compared with 2010, there were no statistically significant changes in the perceived importance of these services (see Table 3).

Question 7: 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 19 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY

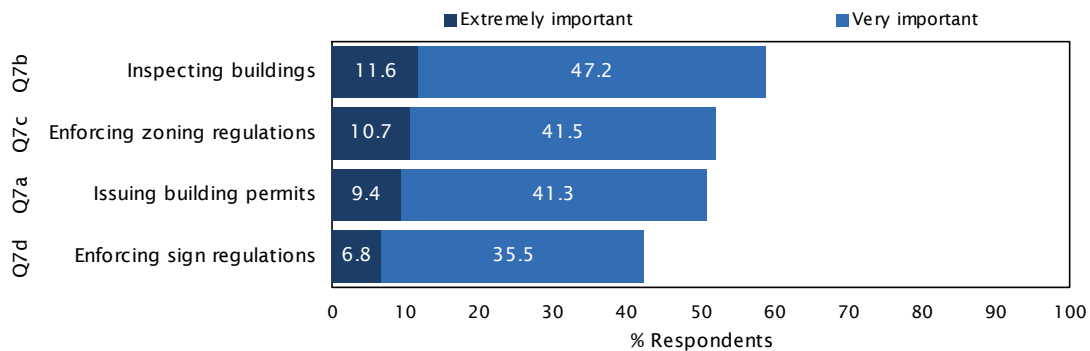


TABLE 3 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY (2012 ~ 2010)

| | Study Year | | Change in Extremely + Very Important |
|------------------------------|------------|------|--------------------------------------|
| | 2012 | 2010 | |
| Enforcing sign regulations | 42.3 | 39.3 | +3.0 |
| Enforcing zoning regulations | 52.1 | 49.4 | +2.7 |
| Issuing building permits | 50.7 | 48.9 | +1.8 |
| Inspecting buildings | 58.8 | 60.6 | -1.7 |

Figure 20 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 90% for enforcing zoning regulations to a high of 94% for inspecting buildings. There were no statistically significant changes between the 2010 and 2012 studies (see Table 4).

Question 8: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 20 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY

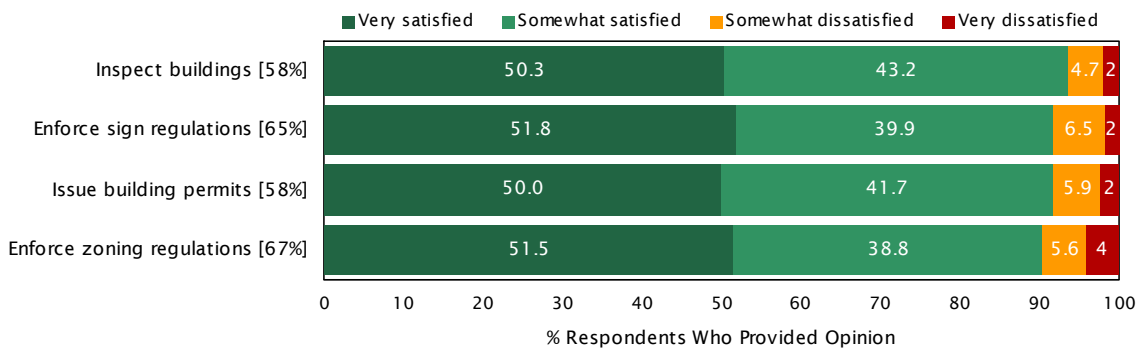


TABLE 4 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY (2012 ~ 2010)

| | Study Year | | Change in Satisfaction |
|----------------------------|------------|------|------------------------|
| | 2012 | 2010 | |
| Inspect buildings | 93.5 | 93.1 | +0.4 |
| Issue building permits | 91.7 | 92.2 | -0.5 |
| Enforce sign regulations | 91.7 | 93.7 | -2.0 |
| Enforce zoning regulations | 90.3 | 93.2 | -2.9 |

† Statistically significant change ($p < 0.05$) between the 2010 and 2012 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 21, just 10% of residents surveyed indicated that they had interacted with the Department during the 12 months prior to the survey in 2012, which is virtually identical to the percentage recorded in 2010. When compared with their respective counterparts, interaction with the Development Services Department during this period was most frequently reported by those who had resided in the City ten or more years, those between the ages of 50 and 64, and those who reside in Area Two (see Figure 22).

Question 9: 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 21 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY (2012 ~ 2006)

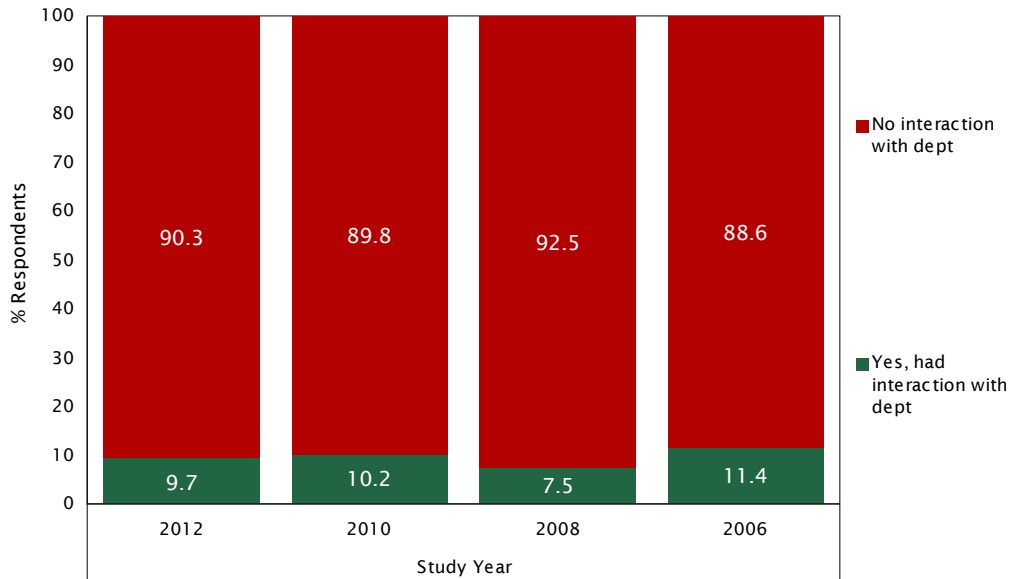
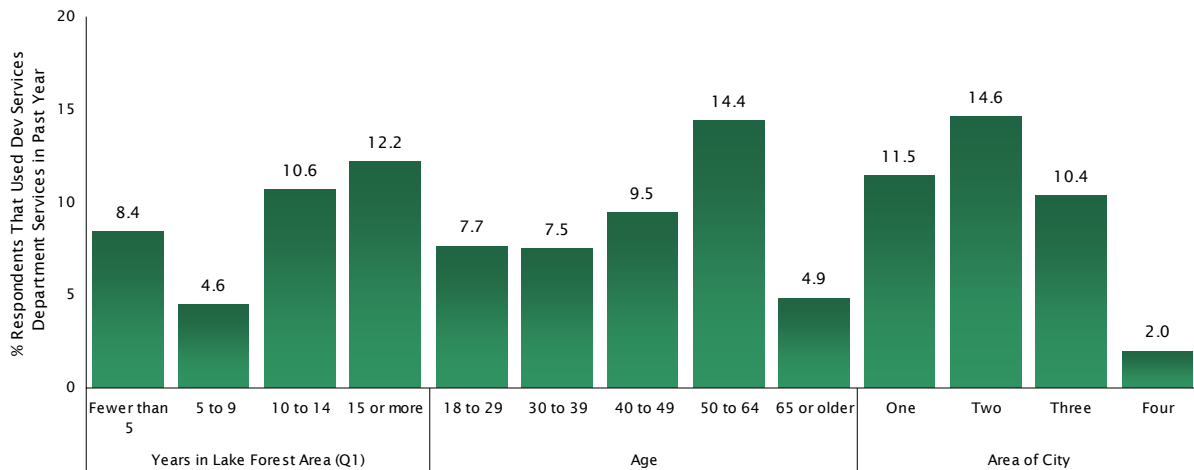


FIGURE 22 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AGE & AREA OF CITY



PUBLIC WORKS DEPARTMENT The next figure presents the importance that residents assigned to ten services provided by the Public Works Department, sorted in order of importance. Overall, providing garbage collection services was viewed as the most important service (90%), followed by maintaining local streets and roads (89%), reducing traffic congestion (84%), maintaining parks and picnic areas (80%), and preventing storm-water pollution (79%). When compared with 2012, the importance assigned to maintaining trees increased significantly (see Table 5).

Question 10: 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 23 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY

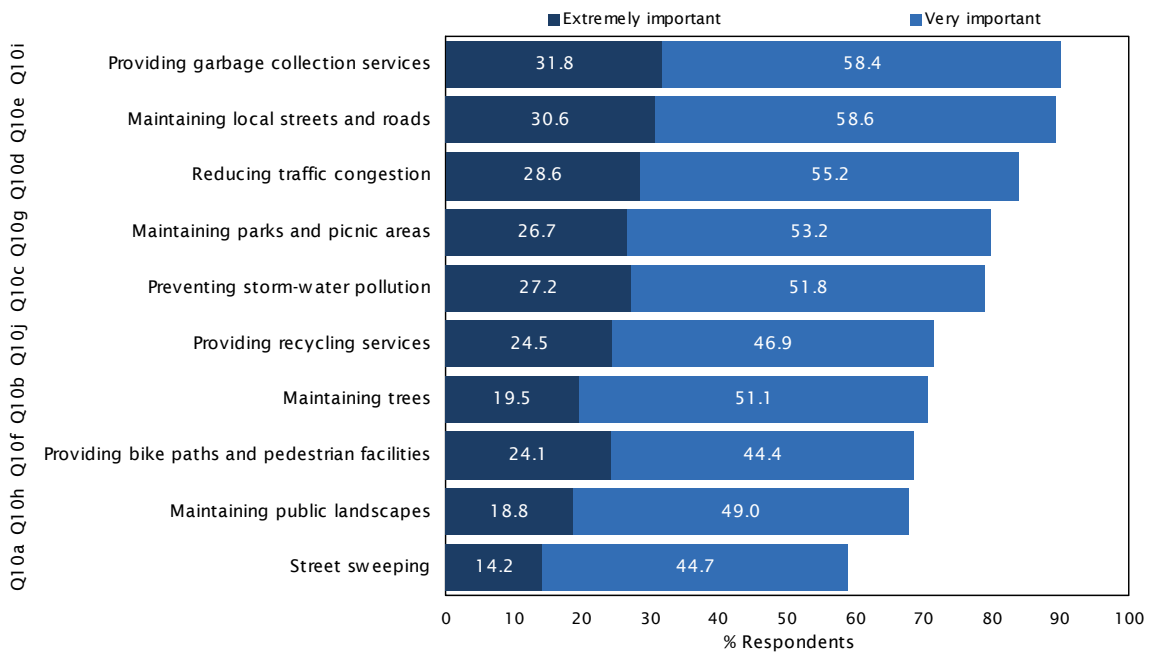


TABLE 5 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY (2012 ~ 2010)

| | Study Year | | Change in Extremely + Very Important |
|--|------------|------|--------------------------------------|
| | 2012 | 2010 | |
| Maintaining trees | 70.7 | 63.8 | +6.8† |
| Street sweeping | 58.9 | 54.3 | +4.6 |
| Providing bike paths and pedestrian facilities | 68.6 | 65.1 | +3.4 |
| Preventing storm-water pollution | 79.0 | 75.6 | +3.4 |
| Maintaining parks and picnic areas | 79.9 | 78.3 | +1.6 |
| Maintaining public landscapes | 67.8 | 66.9 | +0.8 |
| Reducing traffic congestion | 83.9 | 85.5 | -1.7 |
| Maintaining local streets and roads | 89.2 | 93.0 | -3.8 |
| Providing garbage collection services | 90.2 | N/A | N/A |
| Providing recycling services | 71.4 | N/A | N/A |

† Statistically significant change (p < 0.05) between the 2010 and 2012 studies.

Figure 24 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 provide garbage collection service (98%), maintain parks and picnic areas (97%), and prevent storm-water pollution (96%). When compared with 2010, the levels of satisfaction were statistically higher in 2012 for reducing traffic congestion (see Table 6).

Question 11: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 24 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY

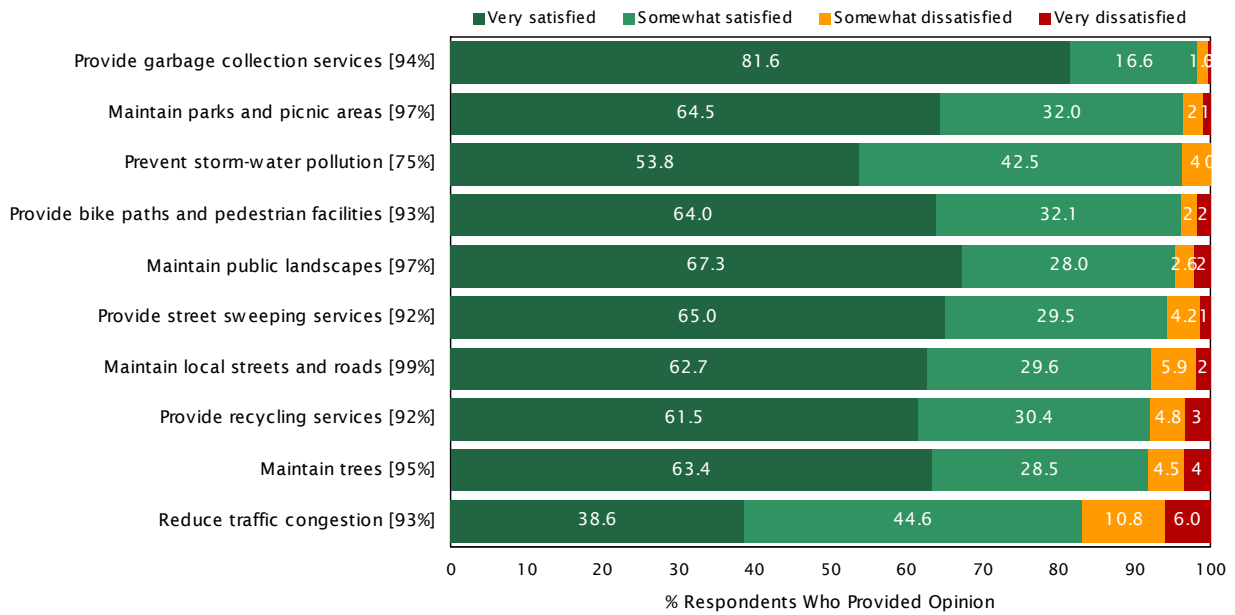


TABLE 6 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY (2012 ~ 2010)

| | Study Year | | Change in Satisfaction |
|--|------------|------|------------------------|
| | 2012 | 2010 | |
| Reduce traffic congestion | 83.2 | 77.4 | +5.8† |
| Provide bike paths and pedestrian facilities | 96.1 | 95.2 | +0.9 |
| Prevent storm-water pollution | 96.3 | 95.4 | +0.9 |
| Maintain parks and picnic areas | 96.5 | 96.4 | +0.1 |
| Maintain local streets and roads | 92.3 | 92.6 | -0.3 |
| Provide street sweeping services | 94.4 | 95.0 | -0.5 |
| Maintain public landscapes | 95.3 | 96.7 | -1.3 |
| Maintain trees | 91.9 | 94.9 | -3.0 |
| Provide garbage collection services | 98.2 | N/A | N/A |
| Provide recycling services | 91.9 | N/A | N/A |

† Statistically significant change (p < 0.05) between the 2010 and 2012 studies.

RESIDENTIAL RECYCLING SERVICES New to the 2012 resident survey was a question regarding the proposed expansion of the City’s curbside recycling program. Specifically, residents were presented with three types of recyclable items and asked if their household has a great, moderate, little, or no need to have these items recycled. As displayed in Figure 25, nearly three-quarters (74%) of respondents perceived their household had a great (38%) or moderate (35%) need for recycling all types of plastics. A smaller but considerable percentage of households perceived a great or moderate need for recycling food waste (54%) and household batteries (47%). For the interested reader, Figure 26 presents the percentage of households that perceived a great or moderate need for each of the three recyclable items by household income and area of the City.

Question 12: Resident Survey *The City is considering expanding its curbside recycling program. Would you say your household has a great need, moderate need, little need, or no need to recycle: _____?*

FIGURE 25 HOUSEHOLD RECYCLING NEEDS

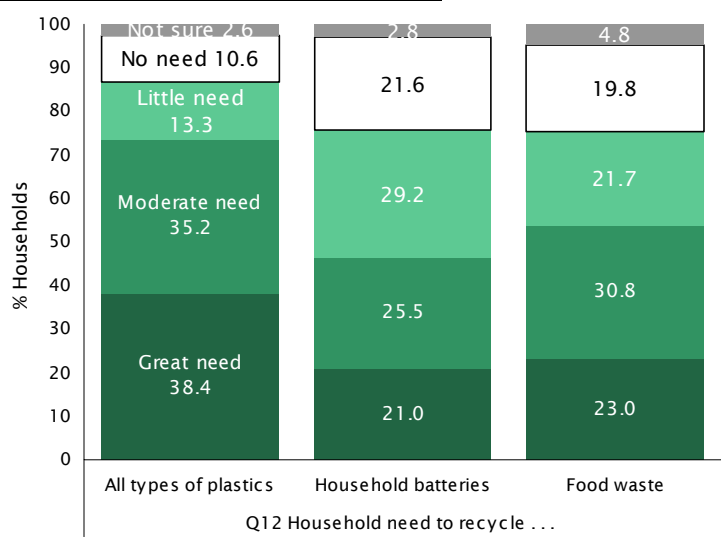
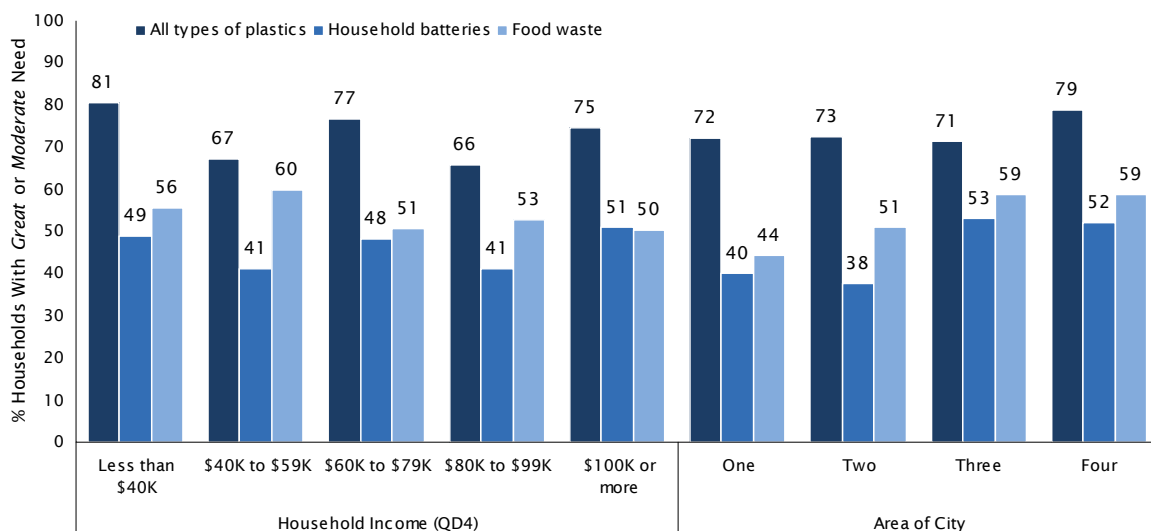


FIGURE 26 HOUSEHOLD RECYCLING NEEDS BY HOUSEHOLD INCOME & AREA OF CITY



COMMUNITY SERVICES DEPARTMENT In a format identical to that used in questions 5, 7, and 10, 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, sorted by order of importance. Overall, residents assigned the highest importance to providing recreation programs for special needs children (72%), followed by providing after school recreation programs (69%), providing recreation and sports programs for elementary school-aged children (68%), and providing recreational and sports programs for teens (66%). At the other end of the spectrum, providing adult sports programs (31%) and adult recreation programs (38%) were viewed as less important. When compared with 2008, the importance assigned in 2012 to providing after school recreation programs and providing recreation programs for pre-school children increased significantly (see Table 7 on the next page).

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

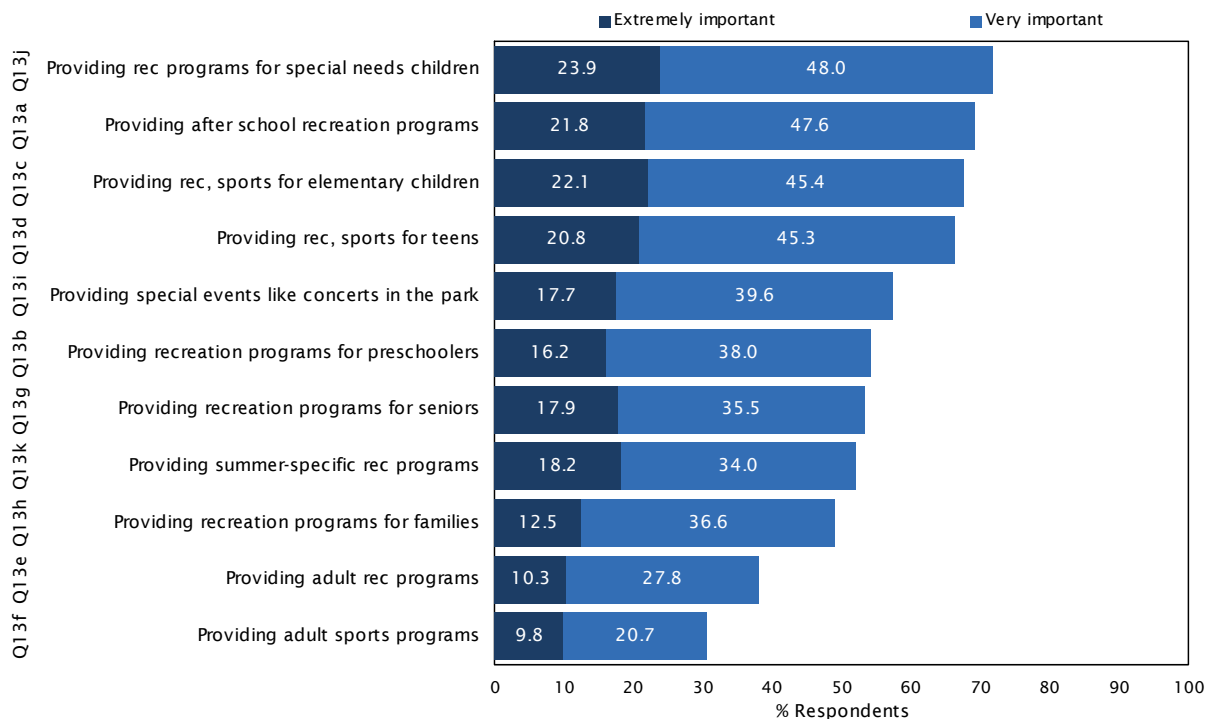


TABLE 7 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY (2012 ~ 2010)

| | Study Year | | Change in Extremely + Very Important |
|--|------------|------|--------------------------------------|
| | 2012 | 2010 | |
| Providing after school recreation programs | 69.3 | 54.3 | +15.1† |
| Providing recreation programs for preschoolers | 54.2 | 46.3 | +7.9† |
| Providing recreation programs for families | 49.1 | 46.8 | +2.3 |
| Providing recreation programs for seniors | 53.4 | 51.3 | +2.1 |
| Providing adult sports programs | 30.6 | 28.5 | +2.1 |
| Providing adult rec programs | 38.2 | 37.3 | +0.9 |
| Providing rec, sports for elementary children | 67.6 | 67.0 | +0.6 |
| Providing special events like concerts in the park | 57.4 | 57.9 | -0.6 |
| Providing rec, sports for teens | 66.2 | 71.1 | -4.9 |
| Providing rec programs for special needs children | 71.9 | N/A | N/A |
| Providing summer-specific rec programs | 52.1 | N/A | N/A |

† Statistically significant change (p < 0.05) between the 2010 and 2012 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 like concerts in the park and the Fourth of July Parade (95%), followed by recreation programs for seniors (94%) and summer-specific recreation programs such as camps (93%). Residents were somewhat less satisfied with the Department’s efforts to provide recreation programs for special needs children (86%) and adult sports programs (87%), although even for these services approximately 9 out of every 10 respondents was satisfied. When compared with the results from 2012, the findings for 2010 were statistically similar (see Table 8 on the next page).

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

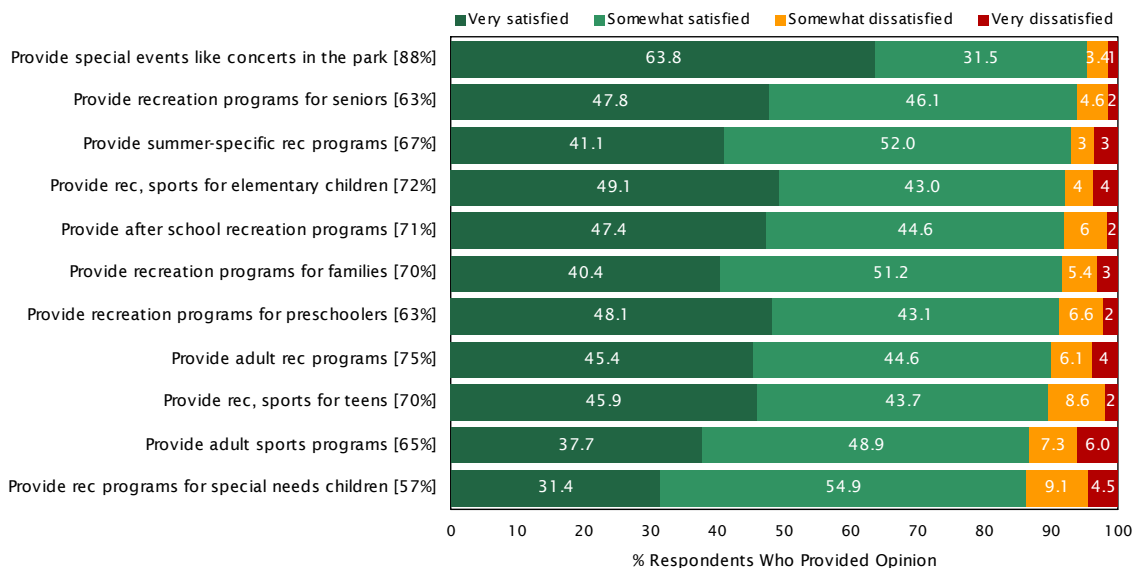


TABLE 8 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY (2012 ~ 2010)

| | Study Year | | Change in Satisfaction |
|--|------------|------|------------------------|
| | 2012 | 2010 | |
| Provide recreation programs for seniors | 93.9 | 92.7 | +1.2 |
| Provide adult sports programs | 86.6 | 86.7 | -0.1 |
| Provide rec, sports for teens | 89.6 | 90.1 | -0.5 |
| Provide rec, sports for elementary children | 92.1 | 92.8 | -0.7 |
| Provide after school recreation programs | 92.0 | 93.0 | -1.0 |
| Provide recreation programs for preschoolers | 91.2 | 92.4 | -1.1 |
| Provide recreation programs for families | 91.6 | 92.9 | -1.3 |
| Provide special events like concerts in the park | 95.2 | 97.4 | -2.2 |
| Provide adult rec programs | 90.0 | 92.8 | -2.9 |
| Provide rec programs for special needs children | 86.4 | N/A | N/A |
| Provide summer-specific rec programs | 93.1 | N/A | N/A |

SPECIFIC SERVICES: BUSINESS SURVEY

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

Figure 29 provides the importance ratings assigned to each of the services tested in the first list, which can be loosely categorized as ‘general City services’. Overall, the business community rated maintaining a low crime rate as the most important of the services tested (96%), followed by investigating criminal activity (87%) and promoting economic development (77%). At the other end of the spectrum, the business community viewed providing free business consulting services (34%), business education events (36%), and building inspection services (42%) as less important. When compared with the 2010 results, the perceived importance of promoting enforcing traffic laws and providing building inspection services increased significantly (see Table 9 on the next page).

Question 6: 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.*

FIGURE 29 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY

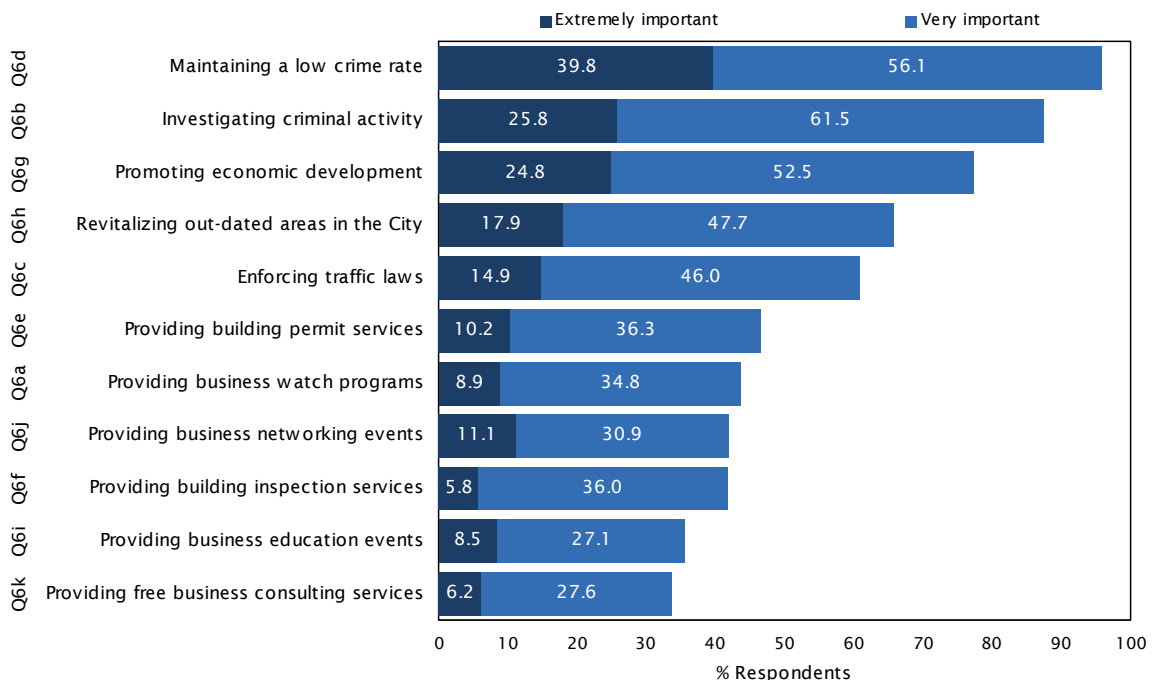


TABLE 9 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY (2012 ~ 2010)

| | Study Year | | Change in Extremely + Very Important |
|---|------------|------|--------------------------------------|
| | 2012 | 2010 | |
| Enforcing traffic laws | 60.9 | 50.1 | +10.8† |
| Providing building inspection services | 41.7 | 33.1 | +8.6† |
| Providing business education events | 35.6 | 28.7 | +6.8 |
| Providing building permit services | 46.5 | 40.1 | +6.4 |
| Providing business watch programs | 43.6 | 41.2 | +2.5 |
| Investigating criminal activity | 87.3 | 85.2 | +2.1 |
| Providing business networking events | 42.0 | 40.1 | +1.9 |
| Providing free business consulting services | 33.7 | 32.1 | +1.6 |
| Maintaining a low crime rate | 95.8 | 95.3 | +0.5 |
| Promoting economic development | 77.3 | 80.1 | -2.8 |
| Revitalizing out-dated areas in the City | 65.6 | N/A | N/A |

† Statistically significant change (p < 0.05) between the 2010 and 2012 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 2010 (see Figure 30 and Table 10). At the top of the satisfaction scale was maintaining a low crime rate (97%), investigating criminal activity (95%), and revitalizing out-dated areas in the City (95%). Businesses were slightly less satisfied with the City’s efforts to promote economic development (90%) and provide business networking events (91%). There were no statistically significant changes in satisfaction between 2010 and 2012 (see Table 10).

Question 7: 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

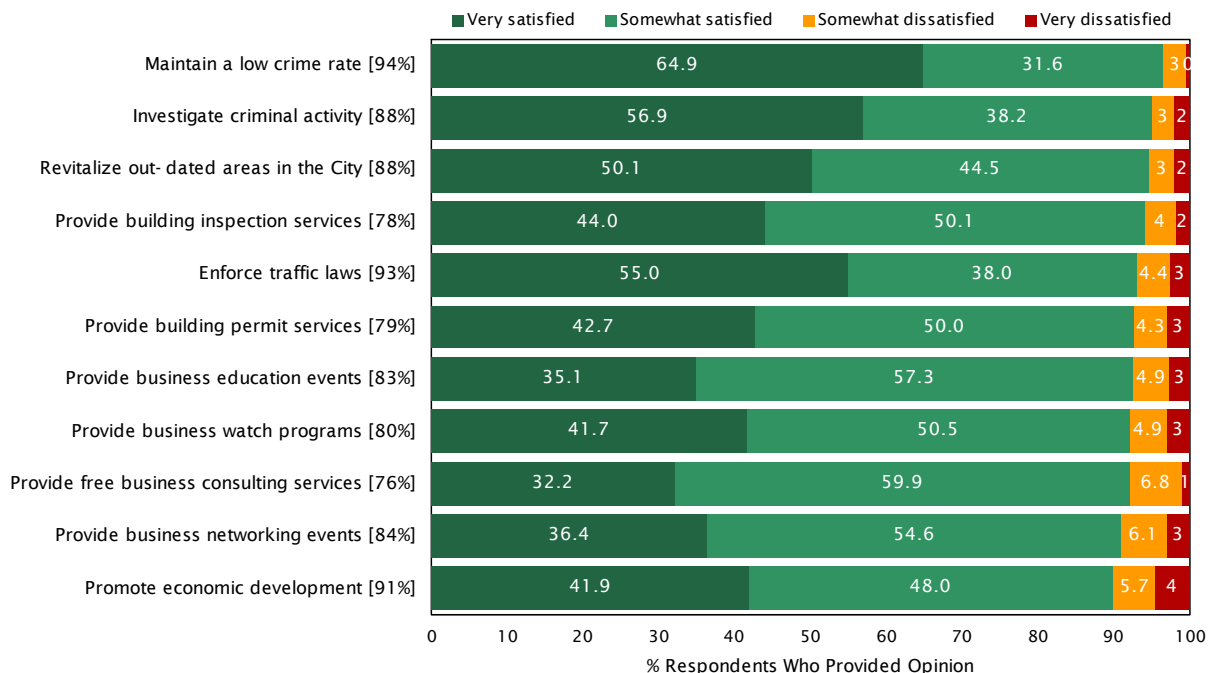


TABLE 10 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY (2012 ~ 2010)

| | Study Year | | Change in Satisfaction |
|---|------------|------|------------------------|
| | 2012 | 2010 | |
| Provide business watch programs | 92.2 | 85.9 | +6.3 |
| Provide free business consulting services | 92.1 | 86.5 | +5.6 |
| Provide business education events | 92.4 | 89.3 | +3.0 |
| Enforce traffic laws | 93.0 | 90.7 | +2.3 |
| Investigate criminal activity | 95.1 | 94.2 | +1.0 |
| Maintain a low crime rate | 96.5 | 95.8 | +0.7 |
| Provide business networking events | 90.9 | 90.8 | +0.1 |
| Provide building permit services | 92.7 | 93.7 | -0.9 |
| Provide building inspection services | 94.1 | 95.1 | -1.0 |
| Promote economic development | 89.9 | 92.0 | -2.2 |
| Revitalize out-dated areas in the City | 94.6 | N/A | N/A |

The second list of services, shown in Figure 31, relates mostly to maintaining and improving the City’s infrastructure. When asked to rate the importance they assign to each of these services, members of the business community rated maintaining local streets and roads as most important (90%), followed by reducing traffic congestion (80%), landscaping median strips and other areas of the City (63%), and street sweeping (61%). Enforcing zoning regulations (47%) and enforcing sign regulations (51%) were viewed as the least important services among those tested. When compared with the 2010 survey results, the importance of landscaping median strips and other areas of the City and reducing traffic congestion increased significantly (see Table 11 on the next page).

Question 8: 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.*

FIGURE 31 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY

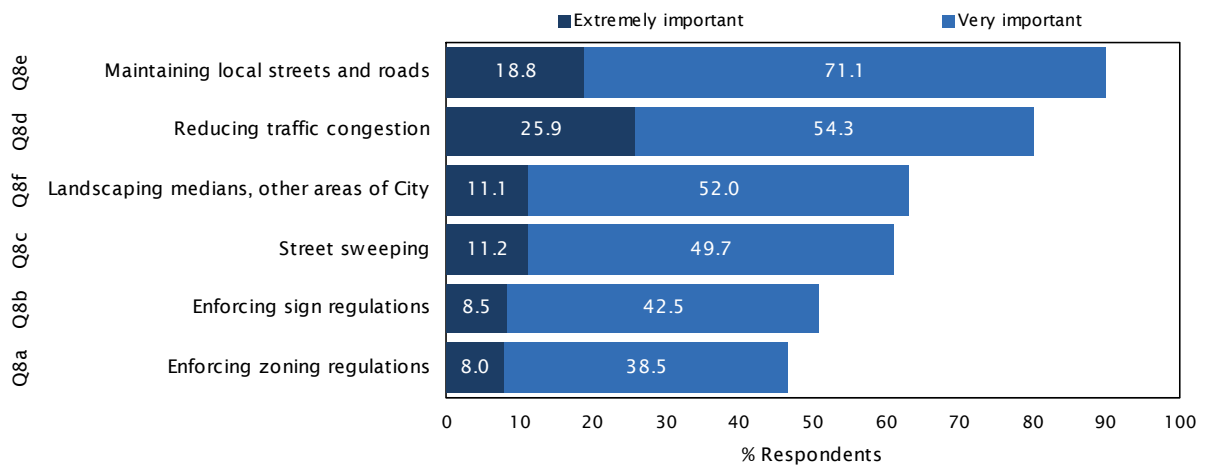


TABLE 11 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY (2012 ~ 2010)

| | Study Year | | Change in Extremely + Very Important |
|--|------------|------|--------------------------------------|
| | 2012 | 2010 | |
| Landscaping medians, other areas of City | 63.1 | 53.5 | +9.6† |
| Reducing traffic congestion | 80.1 | 70.6 | +9.6† |
| Maintaining local streets and roads | 90.0 | 84.5 | +5.5 |
| Street sweeping | 60.9 | 56.7 | +4.2 |
| Enforcing sign regulations | 50.9 | 47.1 | +3.9 |
| Enforcing zoning regulations | 46.5 | 47.5 | -1.0 |

† Statistically significant change (p < 0.05) between the 2010 and 2012 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 landscape median strips and other areas of the City (98%), maintain local streets and roads (98%), and provide street sweeping services (97%). The business community was slightly less satisfied with efforts to reduce traffic congestion (86%) and enforce sign regulations (89%). There were no statistically significant changes in satisfaction with these services between 2010 and 2012 (see Table 12).

Question 9: 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

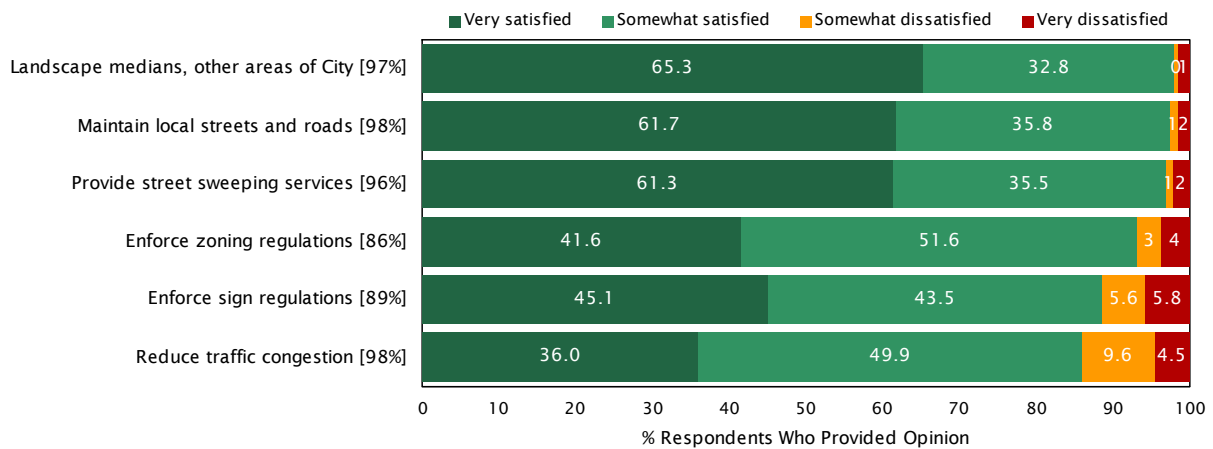


TABLE 12 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY (2012 ~ 2010)

| | Study Year | | Change in Satisfaction |
|--|------------|------|------------------------|
| | 2012 | 2010 | |
| Landscape medians, other areas of City | 98.0 | 95.0 | +3.1 |
| Maintain local streets and roads | 97.5 | 95.6 | +1.9 |
| Reduce traffic congestion | 85.9 | 84.6 | +1.3 |
| Provide street sweeping services | 96.8 | 95.6 | +1.3 |
| Enforce zoning regulations | 93.2 | 92.2 | +1.0 |
| Enforce sign regulations | 88.6 | 89.8 | -1.3 |

BUSINESS RECYCLING SERVICES New to the 2012 business survey was a set of questions regarding awareness of Senate Bill 1018, which included an amendment requiring businesses that generate four or more cubic yards of commercial solid waste per week to arrange for recycling services, as well as the business community’s interest in receiving various types of recycling assistance from the City.

As displayed in Figure 33, less than one-quarter (21%) of business managers were aware of the State of California’s newly passed law requiring businesses that throw away at least four cubic yards of trash per week to have a recycling program. For the interested reader, Figure 34 presents level of awareness by number of employees and business category.

Question 10: Business Survey *The State of California recently passed a law that requires businesses that throw away at least four cubic yards of trash per week to have a recycling program. The law also requires cities to monitor and provide support to businesses for their recycling programs. Prior to taking this survey, were you aware of this new recycling law?*

FIGURE 33 AWARENESS OF NEW RECYCLING LAW

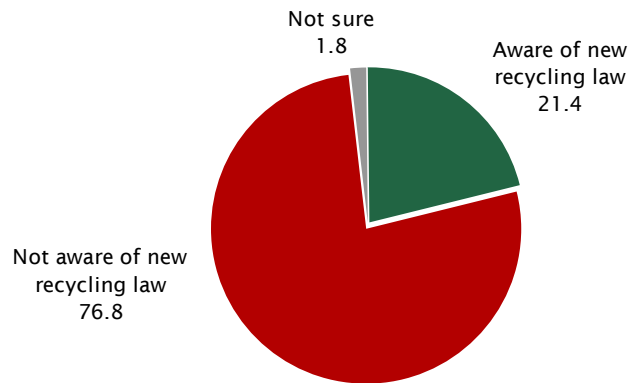
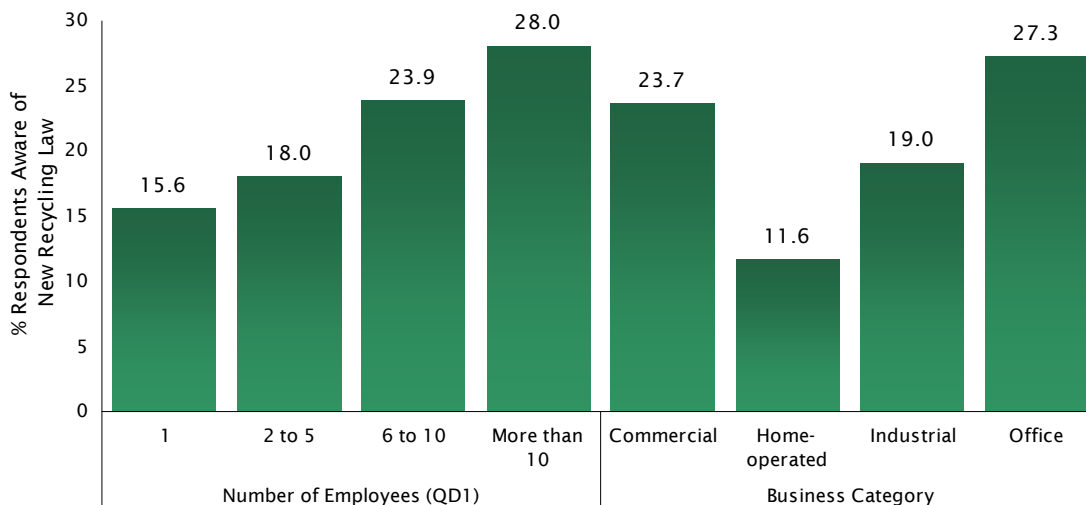


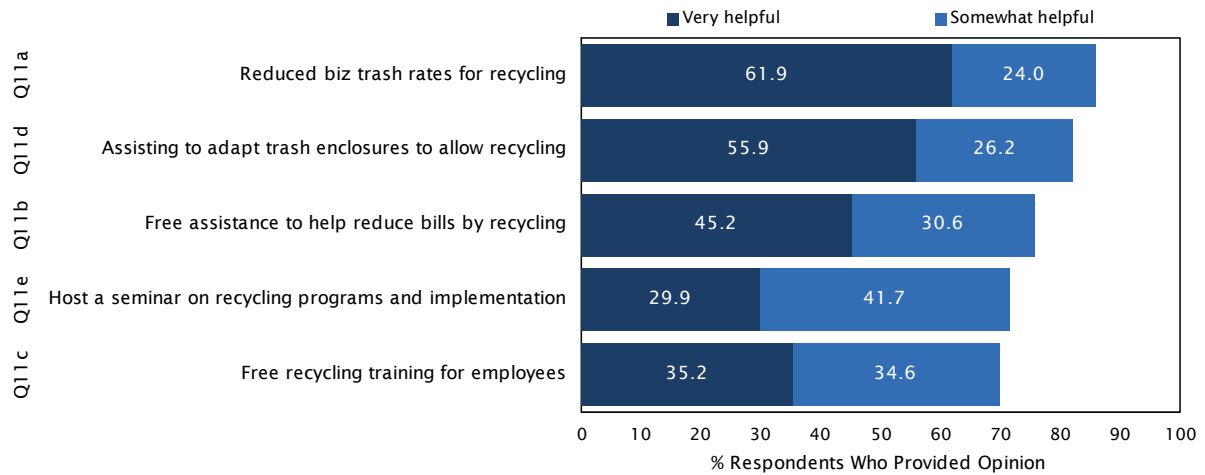
FIGURE 34 AWARENESS OF NEW RECYCLING LAW BY LAKE FOREST RESIDENT & BUSINESS CATEGORY



Business managers were next presented with five types of recycling assistance that could be provided by the City of Lake Forest and asked if they felt that each would be very helpful, somewhat helpful, or not helpful to their business, or if it did not apply to their particular business. Figure 35 presents the results of this question, including only those businesses for which a proposed service was applicable. Eighty-six percent (86%) of applicable businesses indicated that receiving reduced trash rates for recycling would be very (62%) or somewhat (24%) helpful. More than three-quarters of applicable businesses also rated assistance with adapting trash enclosures to allow recycling (82%) and free assistance with ways to reduce trash bills by recycling (76%) as very or somewhat helpful if offered by the City.

Question 11: Business Survey *As I read the following actions that the City of Lake Forest can take, please tell me if they would be helpful to your business' recycling efforts.*

FIGURE 35 HELPFULNESS OF RECYCLING ASSISTANCE EFFORTS





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. This approach is built on the recognition that opinions will vary from resident to resident (and business to business) and that understanding this *variation* is required for assessing how well the City is meeting the needs of its constituents.² Table 13 on the next page presents a two-dimensional 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 resident's needs for a particular service. The six groups are as follows:

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

2. Any tool that relies solely on the opinions of the average respondent will provide a limited and occasionally distorted picture of how well an agency is performing. The simple fact is that a City is not comprised of *average* residents or business managers—it is comprised of unique individuals who vary 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 it is this variation that is critical for truly assessing how well the City is meeting the needs of its constituents.

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 13 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 36 presents each of the 33 services tested with residents, along with the percentage of residents who were grouped into each of the six possible categories. Figure 37 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 13. Thus, for example, in the service area of reducing traffic congestion on City streets, the City is exceeding the needs of 7% of residents, moderately meeting the needs of 37% of residents, marginally meeting the needs of 39% of residents, marginally not meeting the needs of 1% of residents, moderately not meeting the needs of 7% of residents, and severely not meeting the needs of 10% of residents.

Perhaps the most important pattern that is shown in both figures is that for all but a few of the services tested the City is meeting the needs of at least 90% of residents and businesses.

FIGURE 36 SERVICE NEEDS: RESIDENT SURVEY

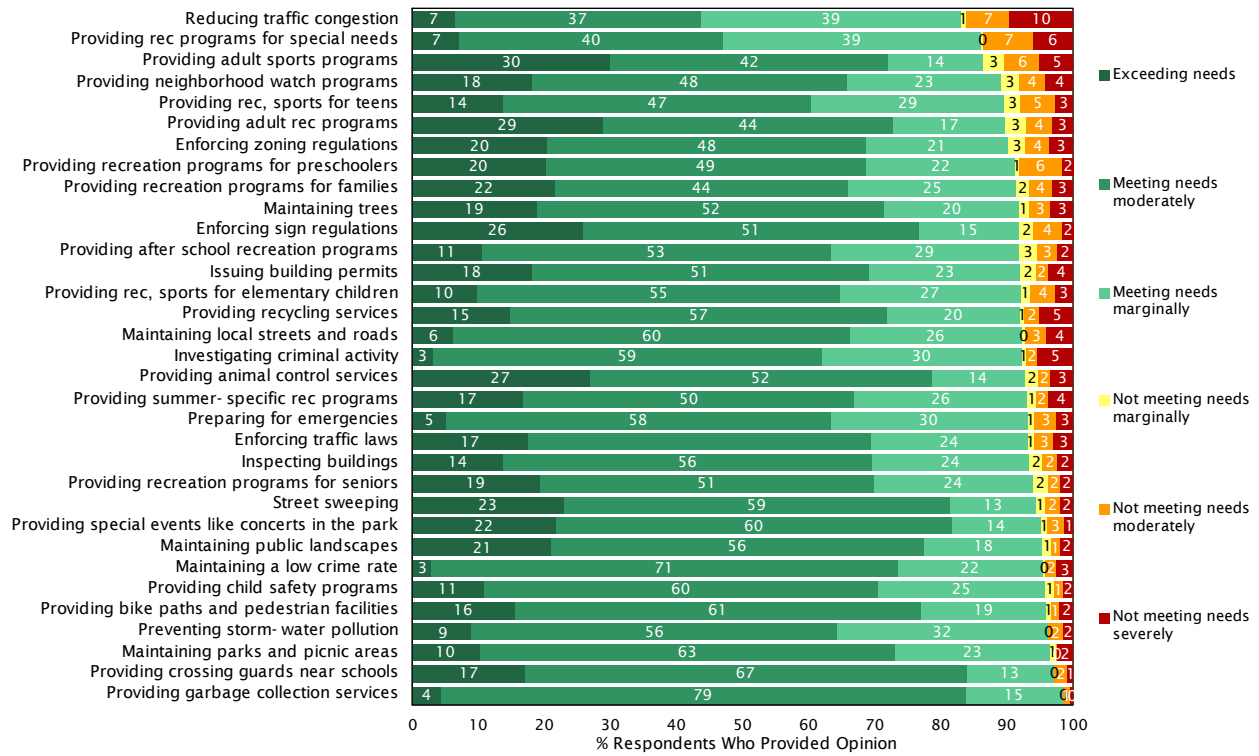
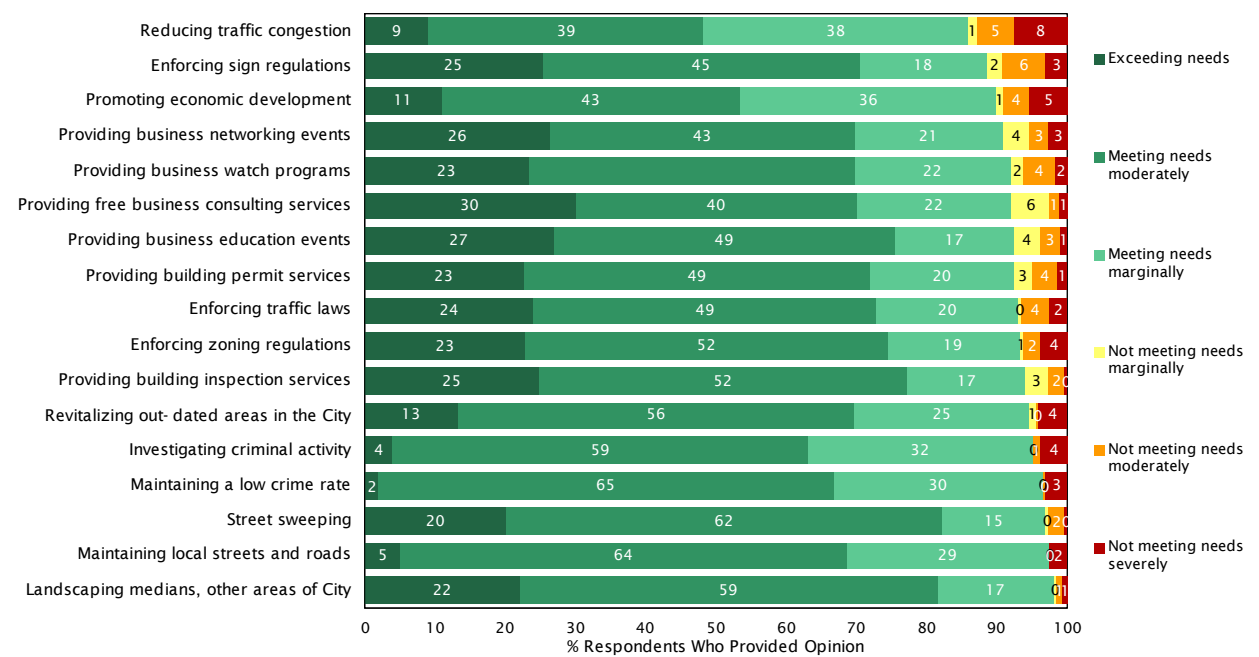


FIGURE 37 SERVICE NEEDS: BUSINESS SURVEY



CIVIC CENTER PROGRAMMING

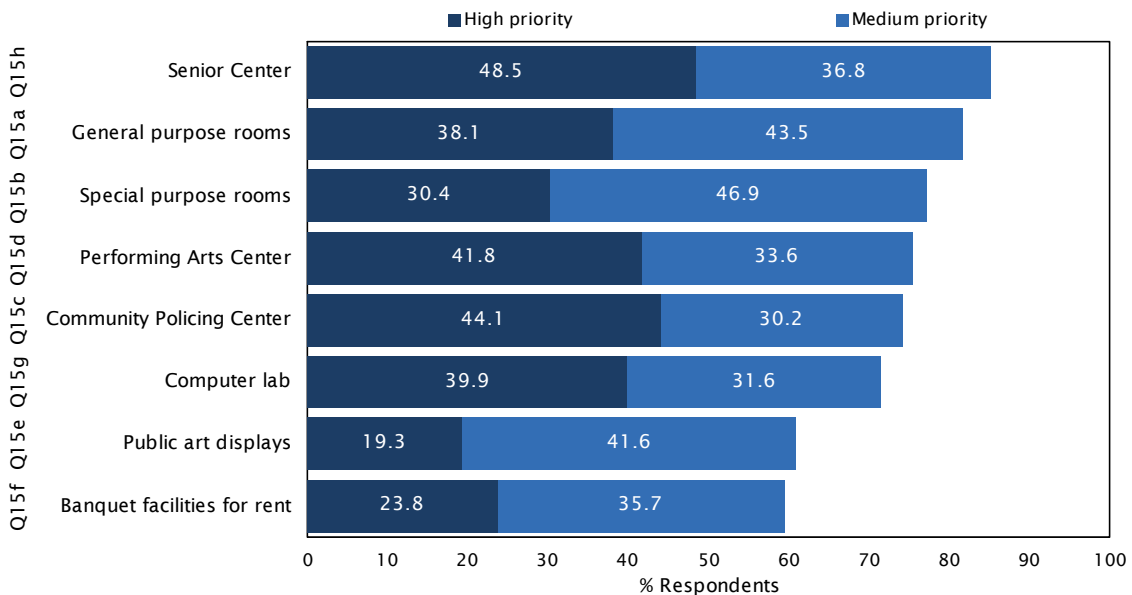
The City of Lake Forest currently leases the City Hall building and property but is planning to build a permanent Civic Center in the near future that will include a variety of amenities to better serve residents. One of the goals of the 2012 study was to assess residents' perceived priorities for the Civic Center.

For each of the amenities listed on the left of Figure 38, residents were asked to indicate whether they think the amenity should be a high, medium, or low priority for inclusion in the Civic Center. They were also offered the option of indicating that the amenity should *not* be part of the Civic Center. To encourage respondents to prioritize—rather than indicate that all amenities are a high priority—they were instructed to keep in mind that not all of the amenities can be high priorities.

The highest-rated priority for the Civic Center was a senior center (85% high or medium priority), followed by general purpose rooms that can be used for meetings, conferences, and classes (82%), and special purpose rooms that can be used for activities like arts and crafts, dance, and aerobics (77%). A performing arts center that will host concerts and plays (75%), community policing center (74%), and computer lab for drop-in and classroom use (72%) were also popular amenities, especially considering the proportion of residents who cited each as a *high priority*.

Question 15: Resident Survey *The City of Lake Forest currently leases the City Hall building and property, but is planning to build a permanent Civic Center in the near future that will include a variety of amenities to better serve residents. As I read each of the following amenities, I'd like you to indicate whether you think the amenity should be a high, medium or low priority for inclusion in the Civic Center, or if you think it should not be a part of the Civic Center. Please keep in mind that not all of the amenities can be high priorities.*

FIGURE 38 PRIORITIES FOR CIVIC CENTER

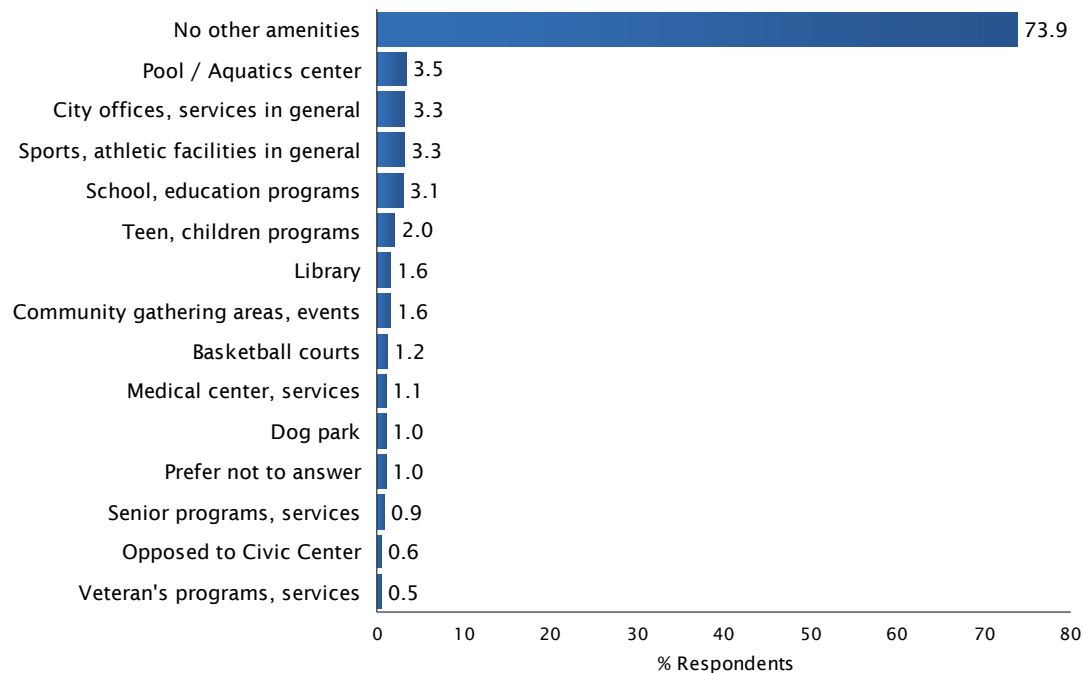


Recognizing that the list provided in Question 15 does not exhaust the list of possible amenities in which Lake Forest residents may have an interest for the Civic Center, respondents were also provided an opportunity to suggest additional amenities not mentioned in the previous list. Question 16 was asked in an open-ended manner, allowing respondents to mention any activity that came to mind. The verbatim responses were later reviewed by True North and grouped into the categories shown in Figure 39.

Nearly three-quarters (74%) of respondents indicated that they could not think of an additional amenity not already listed that they would be very interested in having included in the Civic Center. The top three specific responses to Question 16 were a pool and/or aquatics center (4%), city offices and services in general (3%), sports and athletic facilities in general (3%), and education facilities and programs (3%).

Question 16: Resident Survey *Are there any amenities not included in the previous list that you would be very interested in having included in the new Civic Center?*

FIGURE 39 ADDITIONAL PROGRAMS AND ACTIVITIES FOR RECREATION CENTER



CODE ENFORCEMENT

Research has shown that personal fear of crime and perceptions of safety can be influenced by factors that, although 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 2012 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 40 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY (2012 ~ 2006)

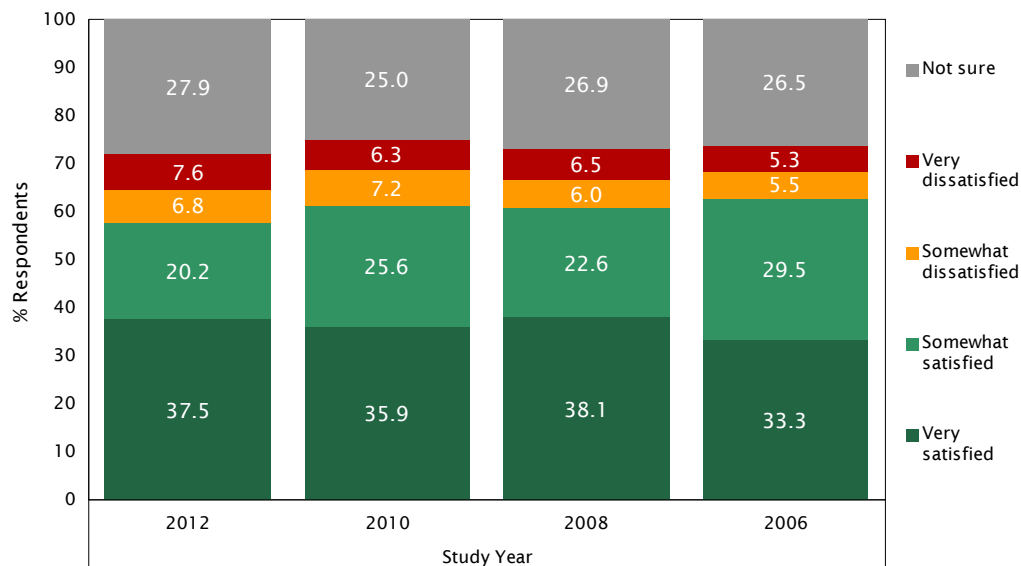


Figure 40 shows that among residents, 28% did not have an opinion regarding the City's code enforcement efforts. Of those with an opinion, approximately 14% were dissatisfied with City's efforts in this respect, whereas the remaining respondents were either very (38%) or somewhat (20%) satisfied with the City's code enforcement efforts. Satisfaction with the City's code enforcement efforts has remained stable since 2006.

For the interested reader, Figures 41 and 42—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 41 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY BY YEARS IN LAKE FOREST & HOUSEHOLD INCOME

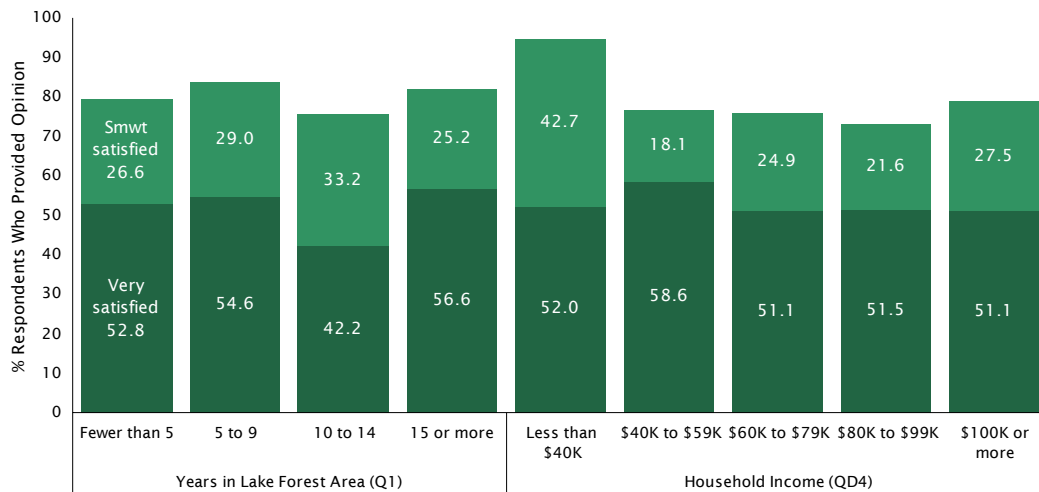
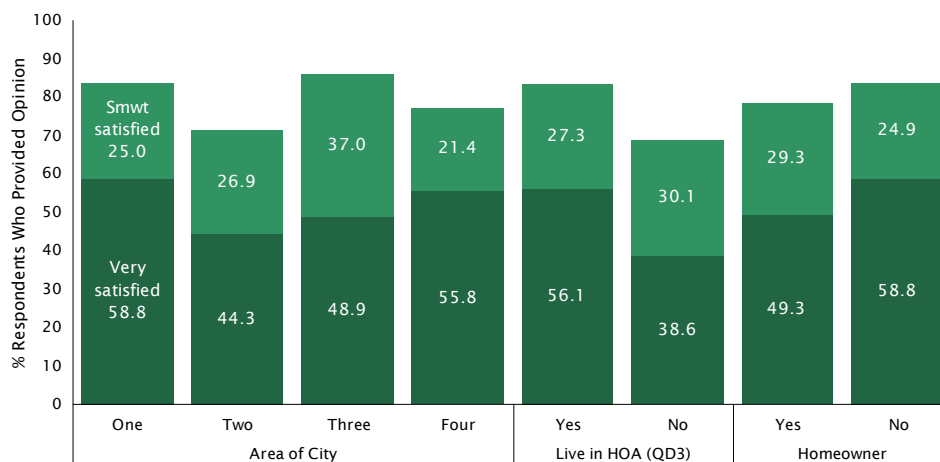


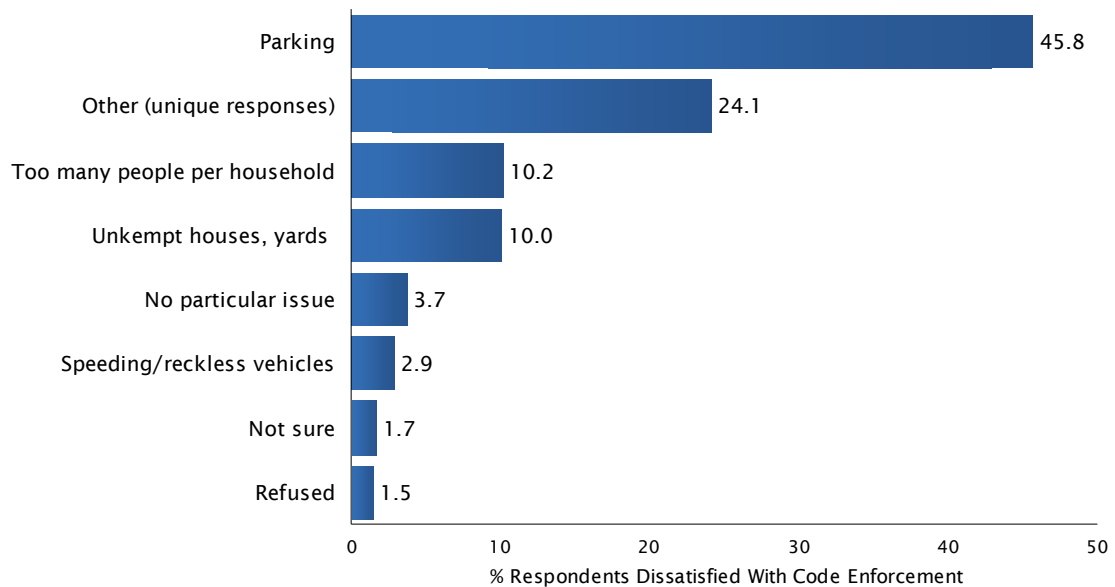
FIGURE 42 SATISFACTION WITH CODE ENFORCEMENT: RESIDENT SURVEY BY AREA OF CITY, LIVE IN HOA & HOME OWNER



For the small percentage of respondents who expressed dissatisfaction with the City’s code enforcement efforts, the survey provided 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. The verbatim responses were later reviewed by True North and grouped into the categories shown in Figure 43 on the next page. Just under half (46%) of respondents who were dissatisfied with the City’s code enforcement efforts attributed their dissatisfaction to parking-related issues. Other specific mentions included homes with multiple families (10%) and unkempt houses and yards (10%).

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

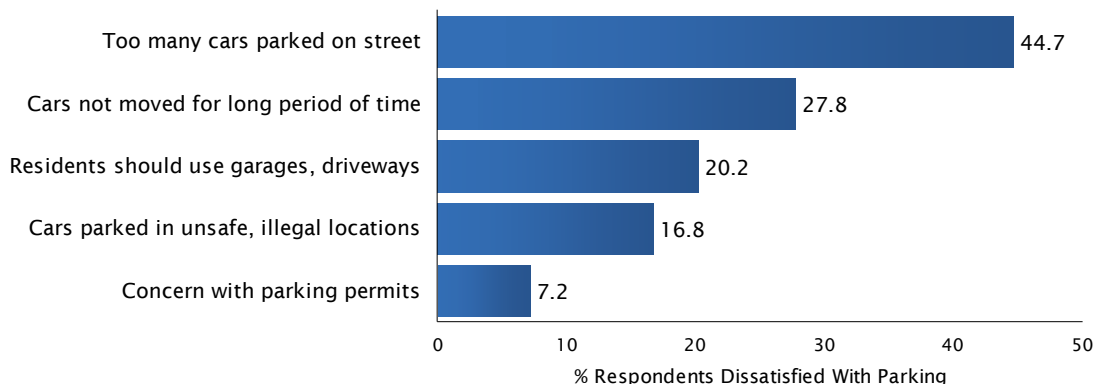
FIGURE 43 REASON FOR DISSATISFACTION WITH CODE ENFORCEMENT



A follow-up question was added to the 2012 survey for residents who were dissatisfied with code enforcement issues related to parking, which asked those individuals to provide more detail about the parking issue of concern. Asked as an open-ended question, verbatim responses were recorded and later grouped into the categories shown in Figure 44. The most frequently mentioned parking issue was households having too many cars parked on the street (45%), followed by cars parked on the street for long periods of time without moving (28%), and the general concern of residents parking their cars on the street instead of using private driveways and garages (20%).

Question 19: Resident Survey *You mentioned parking as a problem. Can you describe in a bit more detail how parking is a problem in your neighborhood?*

FIGURE 44 SPECIFIC PARKING ISSUE CONCERN



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 Residents and businesses were asked to report their overall satisfaction with the City's efforts to communicate with them through newsletters, the Internet, social media, and other means. Overall, 81% of residents indicated that they were either very (52%) or somewhat (29%) satisfied with the City's communication efforts, which is comparable to the ratings received in prior surveys (Figure 45). The vast majority of all subgroups were satisfied with the City's communication efforts, although younger respondents, particularly those under the age of 30, tended to be less satisfied than their counterparts (see figures 46 and 47 on the next page).

Question 20: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means?*

FIGURE 45 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY (2012 ~ 2000)

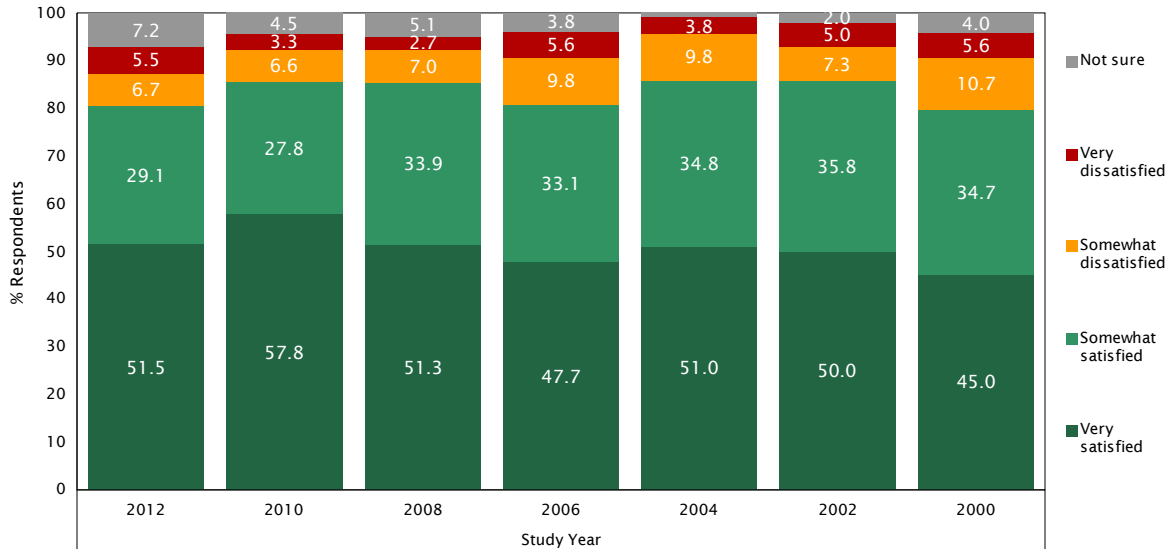


FIGURE 46 SATISFACTION WITH COMMUNICATION: RESIDENT SATISFACTION BY YEARS IN LAKE FOREST AREA, AREA OF CITY & HOUSEHOLD INCOME

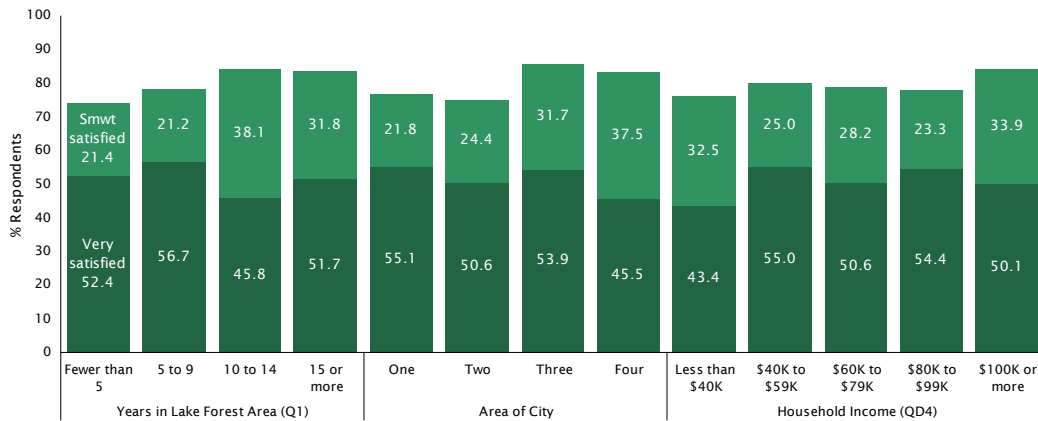
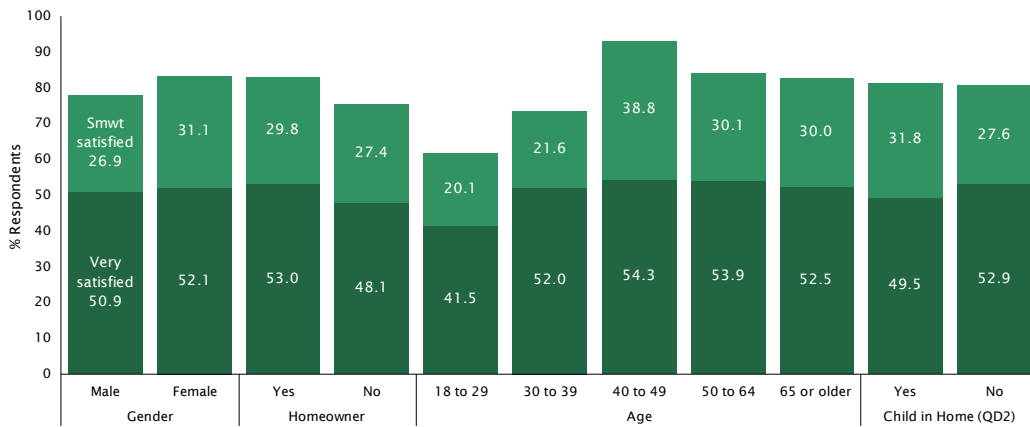


FIGURE 47 SATISFACTION WITH COMMUNICATION: RESIDENT SATISFACTION BY GENDER, HOME OWNER, AGE & CHILD IN HOME



Among local businesses, the level of satisfaction with the City’s communication efforts was also similar to prior surveys, with 84% indicating that they were satisfied and 12% indicating they were dissatisfied (see Figure 48 on the next page). Figures 49 and 50 show how overall satisfaction varied among key business subgroups.

Question 12: Business Survey Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means?

FIGURE 48 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY (2012 ~ 2000)

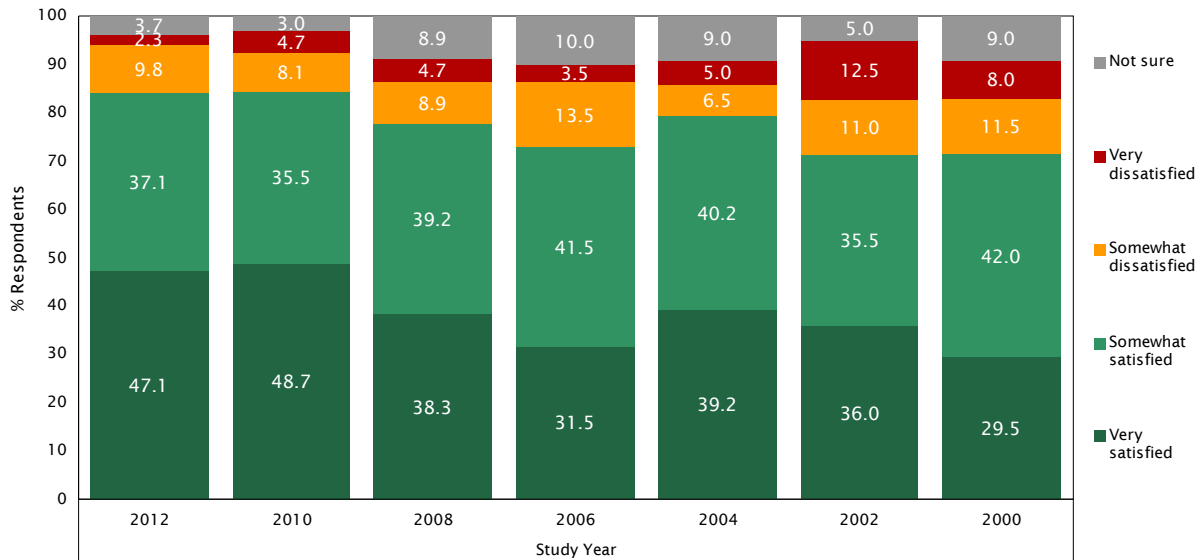


FIGURE 49 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST & BUSINESS CATEGORY

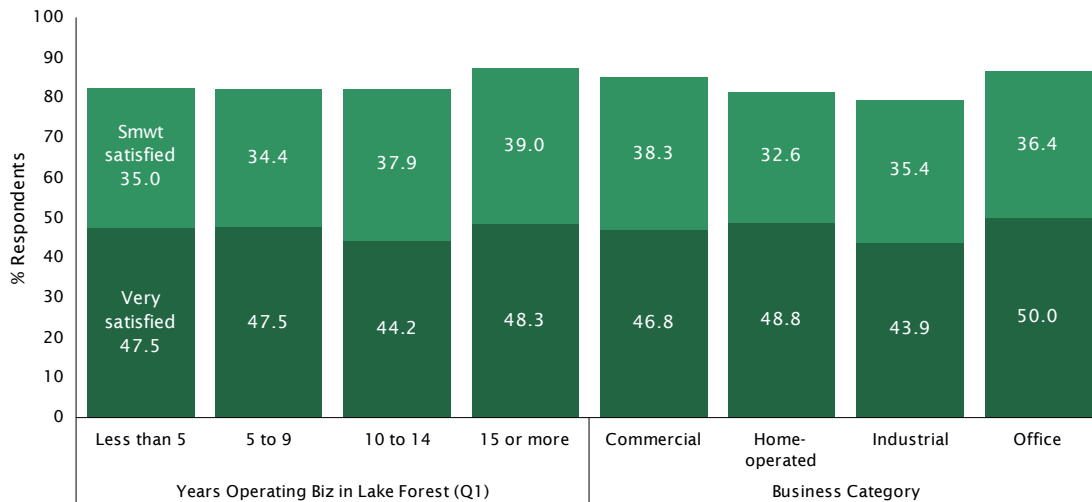
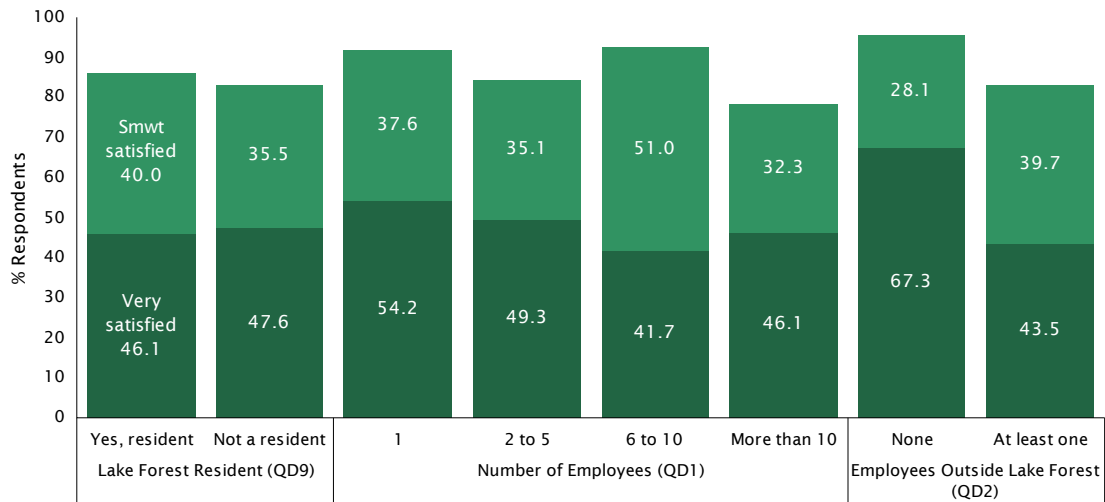


FIGURE 50 SATISFACTION WITH COMMUNICATION: LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST

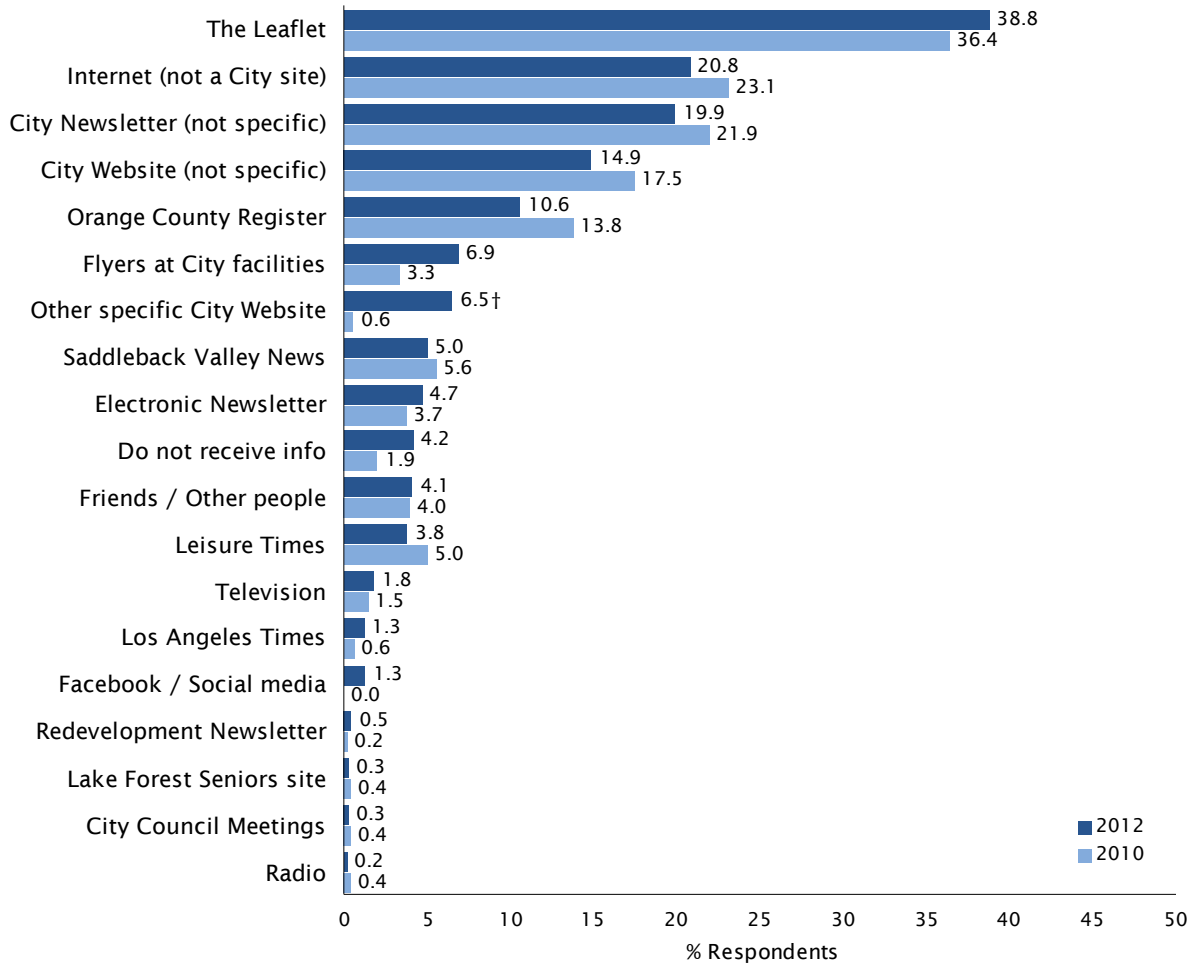


INFORMATION SOURCES Residents and businesses were next asked to indicate which information sources they use to find out about City of Lake Forest news, information, and programming. This question was asked in an open-ended format and respondents were allowed to report up to three sources of information.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

The most frequently cited source of information for City news among residents in 2012 was the City’s newsletter, mentioned by name (*The Leaflet*) by 39% of respondents and referred to in general (the City’s newsletter) by an additional 20% of residents (Figure 51). Other sources mentioned by at least 10% of residents included the Internet in general (21%), the City’s website in general (15%), and the *Orange County Register* (11%). When compared with the 2010 survey results, mention of one of the City’s specific websites, such as the redevelopment site or the Seniors site, increased significantly from 1% to 7%. Table 14 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) whereas older residents are more likely to rely on traditional print and media sources.

Question 21: Resident Survey *What information sources do you use to find out about City of Lake Forest news, information, and programming?*

FIGURE 51 INFORMATION SOURCES: RESIDENT SURVEY (2012 ~ 2010)



† Statistically significant change ($p < 0.05$) between the 2010 and 2012 studies.

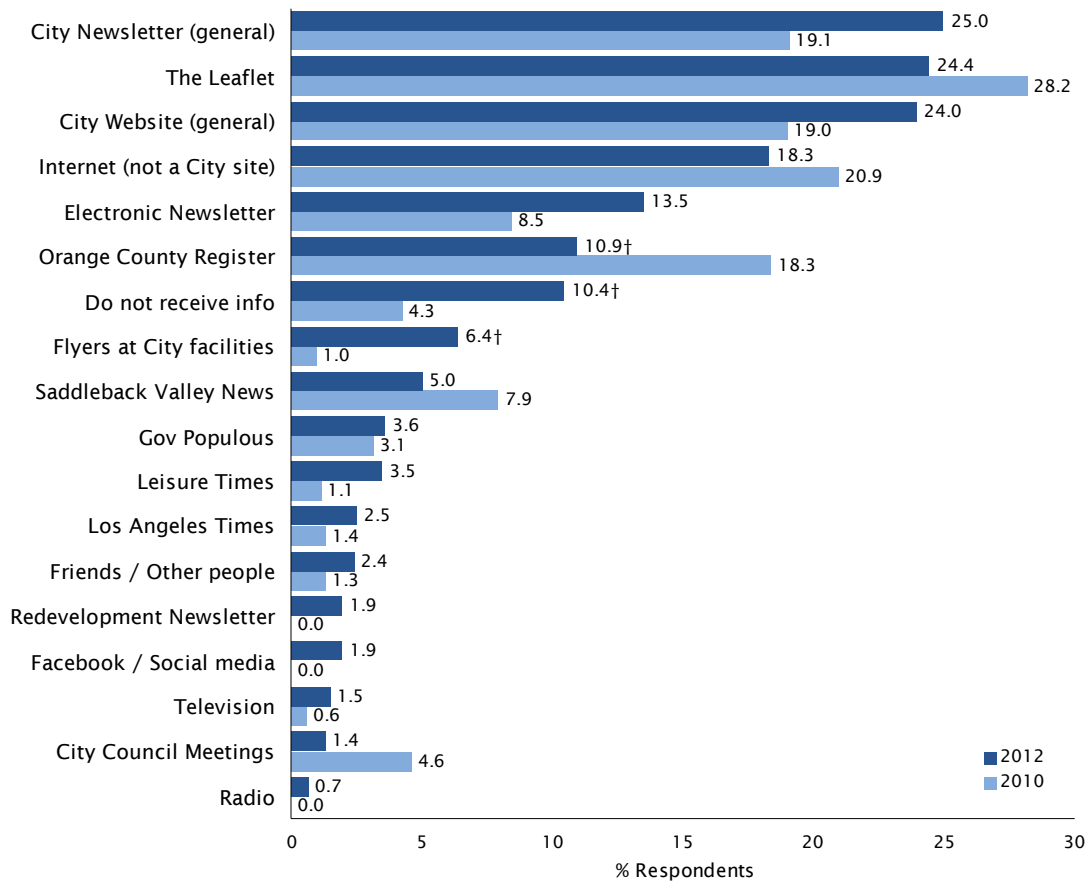
TABLE 14 TOP INFORMATION SOURCES: RESIDENT SURVEY BY AGE

| | Age | | | | |
|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|-------------|
| | 18 to 29 | 30 to 39 | 40 to 49 | 50 to 64 | 65 or older |
| The Leaflet | The Leaflet | The Leaflet | The Leaflet | The Leaflet | The Leaflet |
| Internet (not a City site) | City Website (general) | Internet (not a City site) | Internet (not a City site) | City Newsletter (general) | |
| City Website (general) | City Newsletter (general) | City Newsletter (general) | City Newsletter (general) | Orange County Register | |
| City Newsletter (general) | Internet (not a City site) | Ask Lake Forest | City Website (general) | Internet (not a City site) | |
| Friends / Other people | Electronic Newsletter | City Website (general) | Orange County Register | Flyers at City facilities | |

Members of the business community were most likely to mention the City’s newsletter—generally (25%) and by its name *The Leaflet* (24%)—when asked what information sources they rely on for Lake Forest news, information, and programming (Figure 52). Other commonly mentioned sources included the City’s website in general (24%), the Internet in general (18%), the City’s electronic newsletter (14%), and the *Orange County Register* (11%). When compared with the 2010 study, the proportion of business managers who mentioned that they rely on the *Orange County Register* decreased significantly, as did mention of flyers at City facilities. The percentage of business managers who indicated that they do not receive information from the City also increased significantly, from 4% in 2010 to 10% in 2012.

Question 13: Business Survey *What information sources does your business use to find out about City of Lake Forest news, information, and programming?*

FIGURE 52 INFORMATION SOURCES: BUSINESS SURVEY (2012 ~ 2010)



† Statistically significant change (p < 0.05) between the 2010 and 2012 studies.

MOST COMMON METHOD OF ONLINE ACCESS New to the 2012 resident survey, Question 22 was added to profile the most common methods of accessing online information. As displayed in Figure 53, three-quarters (75%) of residents indicated that they access information online primarily via a computer, 12% using a smart phone, and 8% using a tablet. The remaining respondents indicated that either they do not have online access (4%) or they were unsure of their primary method (2%). Figure 53 presents the findings of this question by age of the respondent and household income.

Question 22: Resident Survey Which do you use most often to access information online, a computer, a smart phone, or a tablet?

FIGURE 53 MOST COMMON METHOD OF ONLINE ACCESS

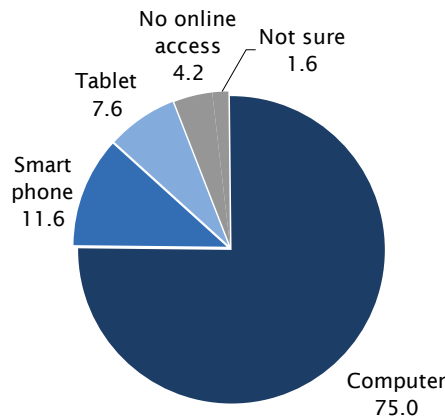
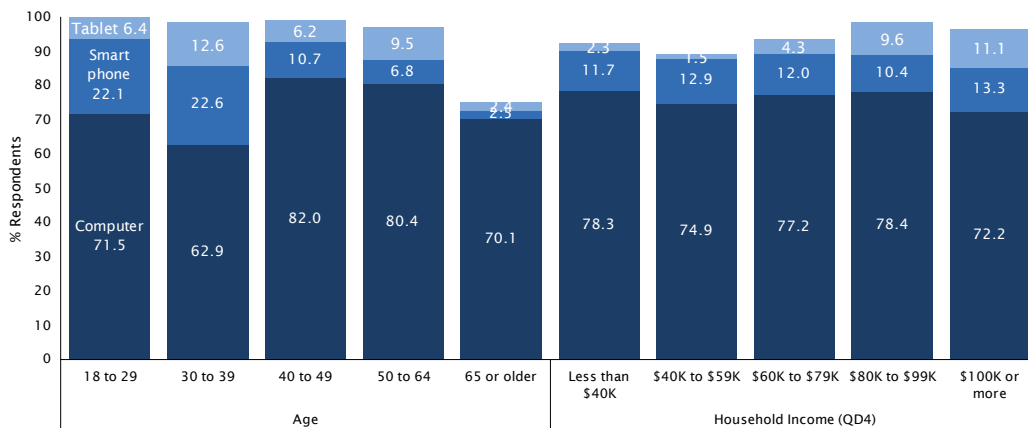


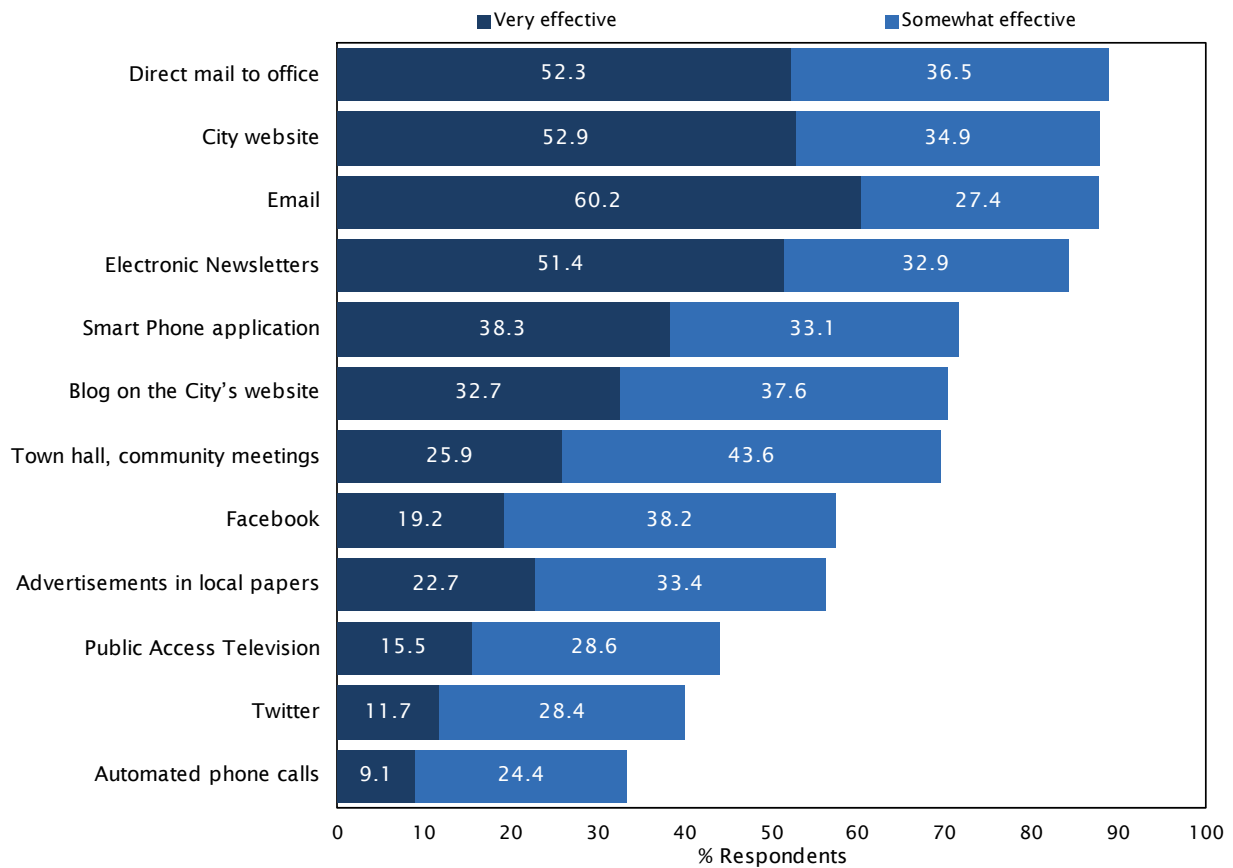
FIGURE 54 MOST COMMON METHOD OF ONLINE ACCESS BY AGE & HOUSEHOLD INCOME



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 asked if each would be an effective way for the City to communicate with them. Overall, respondents indicated that direct mail to their office was the most effective method (89% very or somewhat effective), followed by the City’s website (88%), and email (88%). Automated phone calls (34%), Twitter (40%), and Public Access Television (44%) were rated as less effective.

Question 14: 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 15 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 15 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS BY BUSINESS CATEGORY & SATISFACTION WITH COMMUNICATION (SHOWING % VERY EFFECTIVE)

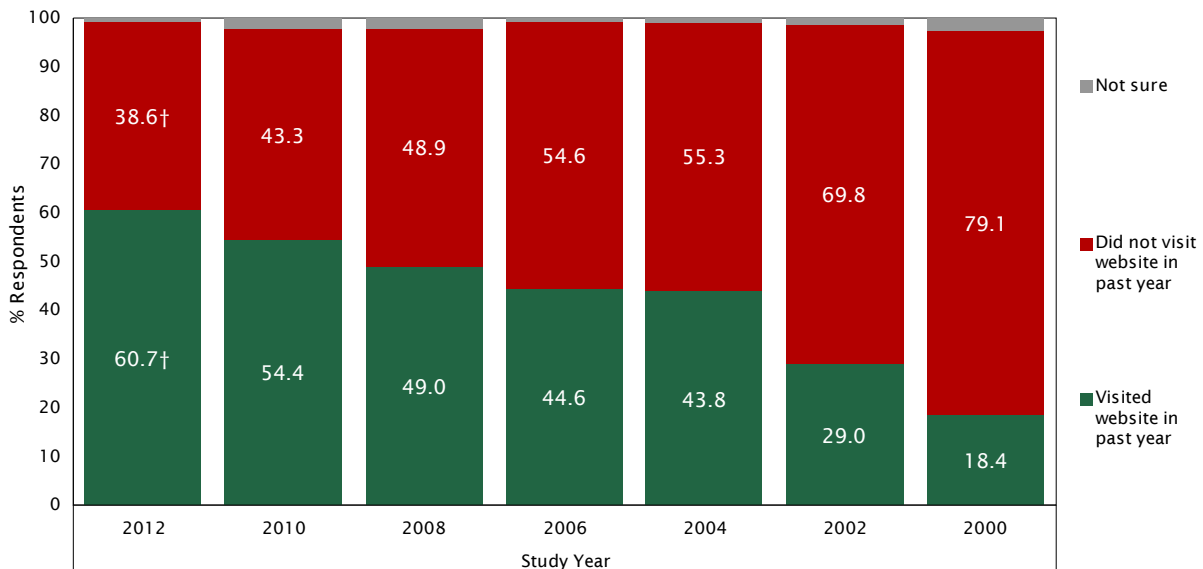
| | Business Category | | | | Satisfaction With Communication (Q12) | |
|--------------------------------|-------------------|---------------|------------|--------|---------------------------------------|--------------|
| | Commercial | Home-operated | Industrial | Office | Satisfied | Dissatisfied |
| Email | 58.3 | 62.8 | 59.8 | 59.1 | 63.7 | 40.9 |
| City website | 52.6 | 48.8 | 50.3 | 54.5 | 55.8 | 41.8 |
| Direct mail to office | 64.1 | 37.2 | 45.5 | 40.9 | 54.9 | 33.3 |
| Electronic Newsletters | 49.1 | 51.2 | 44.7 | 72.7 | 51.0 | 54.2 |
| Smart Phone application | 43.5 | 46.5 | 18.8 | 40.9 | 41.2 | 24.3 |
| Blog on the City's website | 42.1 | 27.9 | 20.6 | 27.3 | 35.0 | 22.6 |
| Town hall, community meetings | 26.0 | 27.9 | 18.3 | 27.3 | 28.9 | 13.5 |
| Advertisements in local papers | 33.0 | 23.3 | 2.1 | 27.3 | 24.7 | 11.3 |
| Facebook | 24.6 | 11.6 | 16.1 | 18.2 | 18.9 | 14.2 |
| Public Access Television | 16.8 | 11.6 | 17.5 | 13.6 | 17.4 | 3.9 |
| Twitter | 14.2 | 16.3 | 8.5 | 4.5 | 11.1 | 10.8 |
| Automated phone calls | 12.2 | 11.6 | 3.7 | 4.5 | 8.7 | 14.2 |

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 use of the City's websites, and 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 only 18% of residents reported visiting the City's websites in 2000, that figure has grown steadily to 61% in 2012 (a statistically significant increase from 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 23: 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 (2012 ~ 2000)



† Statistically significant change ($p < 0.05$) between the 2010 and 2012 studies.

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

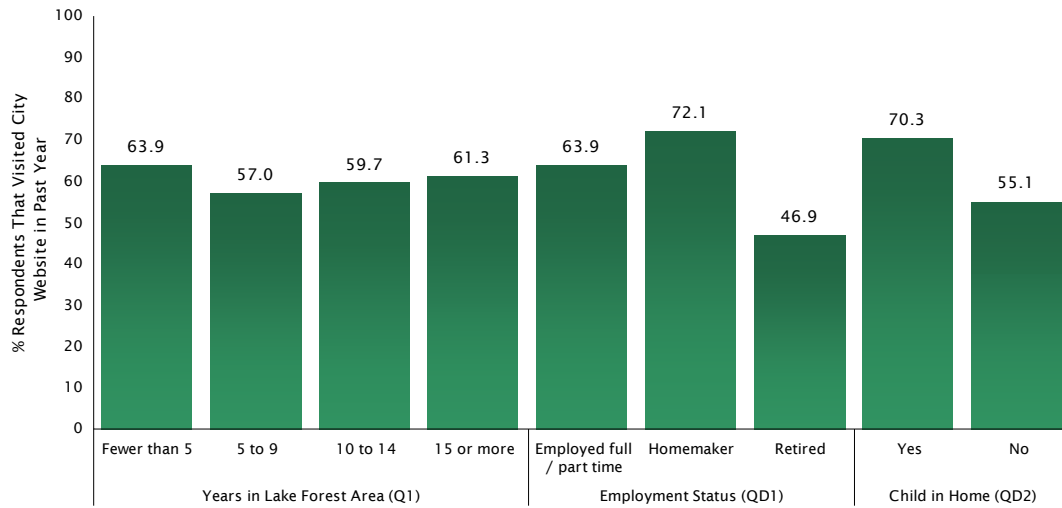
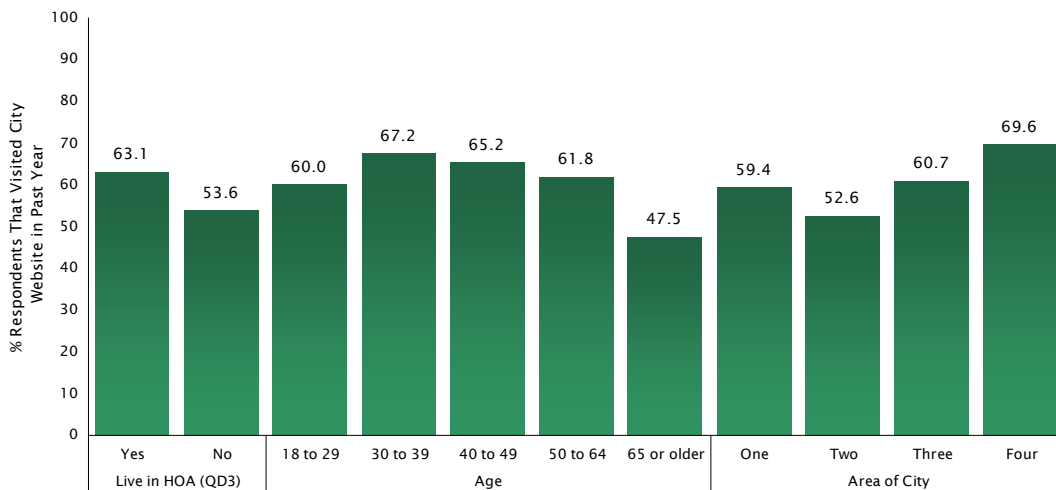


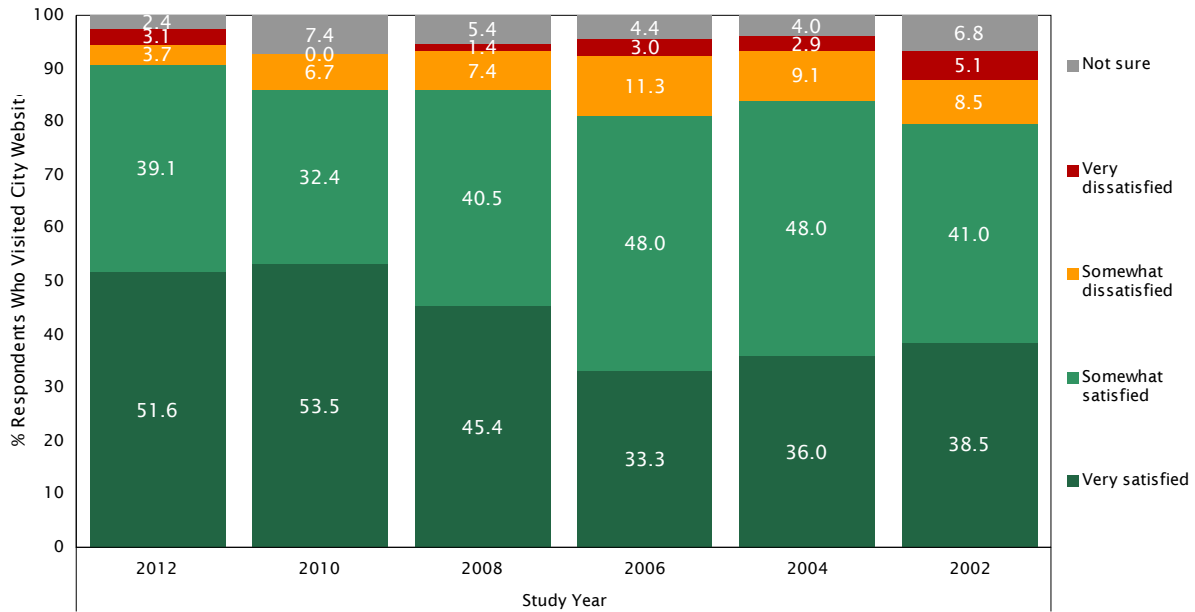
FIGURE 58 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY LIVE IN HOA, AGE & AREA OF CITY



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 59. Overall, visitors expressed high levels of satisfaction with the City’s websites, with 91% of residents indicating they were satisfied with the resources available on the sites.

Question 24: Resident Survey *Are you satisfied or dissatisfied with the resources and content available on the City's web sites?*

FIGURE 59 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY (2012 ~ 2002)



CITY OF LAKE FOREST FACEBOOK PAGE Another addition to the 2012 resident survey was a question that simply asked the respondent if he or she had visited the City of Lake Forest’s Facebook page in the past year. As presented in Figure 60, 7% of residents surveyed indicated that they had visited the City’s Facebook page in the past year. Figure 61 on the next page presents the results of this question by the presence of a child in the home, age of the respondent, and household income.

Question 25: Resident Survey *In the past year, have you visited City of Lake Forest's Facebook page?*

FIGURE 60 VISITED CITY OF LAKE FOREST FACEBOOK PAGE IN PAST YEAR

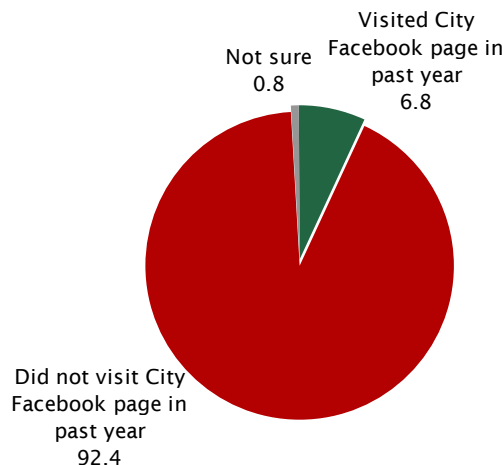
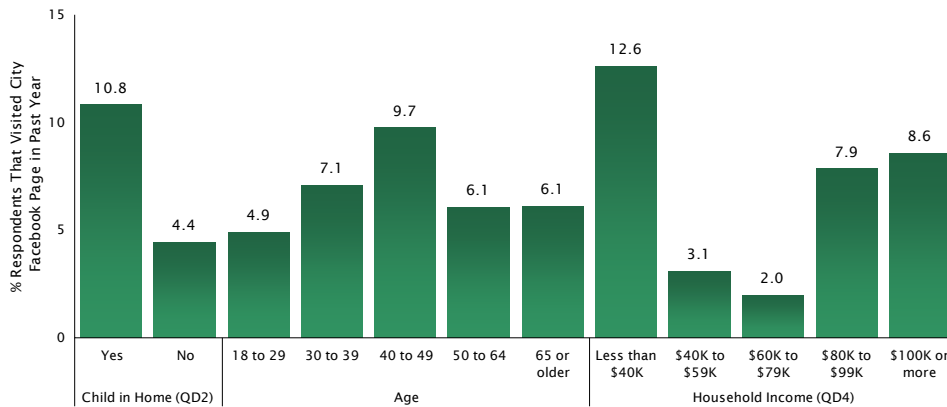


FIGURE 61 VISITED CITY OF LAKE FOREST FACEBOOK PAGE IN PAST YEAR BY CHILD IN HOME, AGE & HOUSEHOLD INCOME



COMMUNICATION PREFERENCES The next communication-related question presented residents with the methods shown on the left of Figure 62 and asked if each would be an effective way for the City to communicate with them. Overall, respondents indicated that newsletters mailed directly to their home was the most effective method (88% very or somewhat effective), followed by the City website (84%), email (77%), and electronic newsletters (77%). Residents overall rated Twitter (23%), automated phone calls (47%), Public Access Television (49%), and Facebook (49%) as the least effective ways for the City to communicate with them. For the interested reader, Table 16 shows how the percentage of residents that rated each communication method as very effective differed by age cohort.

Question 26: 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 62 EFFECTIVENESS OF COMMUNICATION METHODS

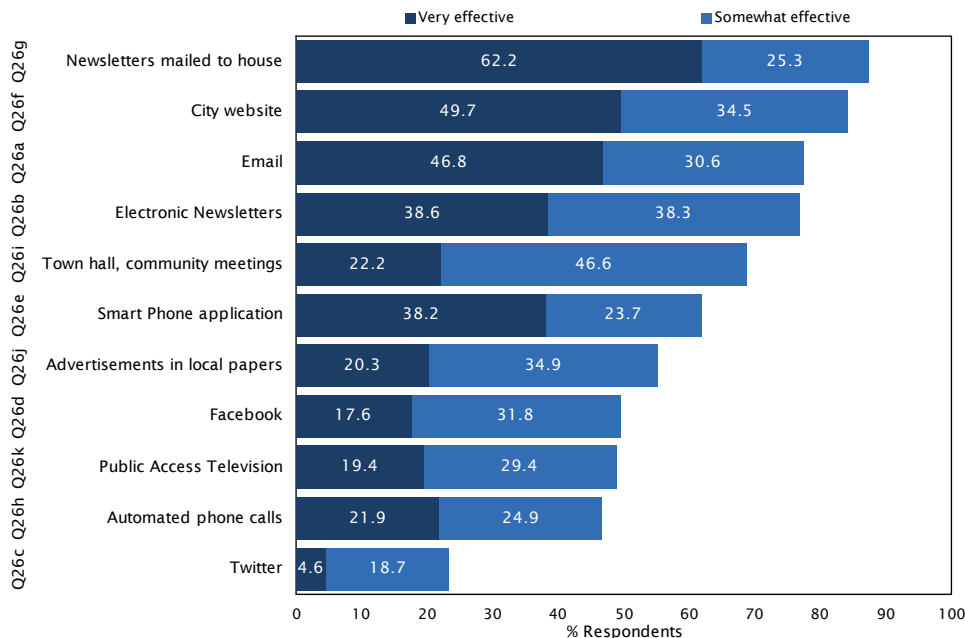


TABLE 16 EFFECTIVENESS OF COMMUNICATION METHODS BY AGE (SHOWING % VERY EFFECTIVE)

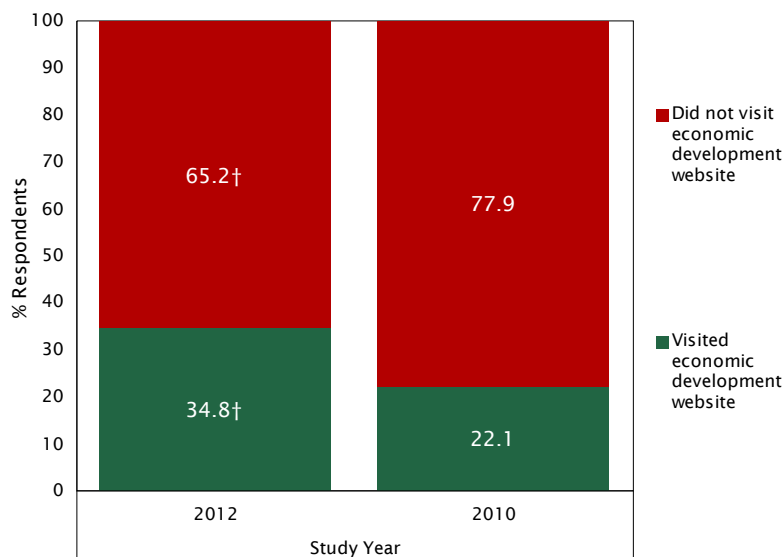
| | Age | | | | |
|--------------------------------|----------|----------|----------|----------|-------------|
| | 18 to 29 | 30 to 39 | 40 to 49 | 50 to 64 | 65 or older |
| Newsletters mailed to house | 47.7 | 61.2 | 59.0 | 69.6 | 66.4 |
| City website | 40.2 | 60.2 | 55.5 | 52.4 | 36.5 |
| Email | 49.0 | 44.4 | 50.8 | 45.2 | 45.2 |
| Electronic Newsletters | 45.1 | 53.2 | 35.7 | 35.3 | 29.0 |
| Smart Phone application | 53.8 | 53.7 | 41.9 | 31.0 | 18.8 |
| Town hall, community meetings | 15.7 | 15.5 | 19.9 | 25.8 | 30.1 |
| Automated phone calls | 10.6 | 11.4 | 24.7 | 27.5 | 27.5 |
| Advertisements in local papers | 20.0 | 19.7 | 14.2 | 18.5 | 32.4 |
| Public Access Television | 22.9 | 13.5 | 20.8 | 19.3 | 20.1 |
| Facebook | 28.1 | 17.4 | 23.4 | 16.2 | 3.7 |
| Twitter | 7.7 | 11.2 | 4.1 | 2.0 | 1.3 |

ECONOMIC DEVELOPMENT WEBSITE First asked in 2010, Question 15 of the business survey asked respondents whether they had ever visited the City’s economic development website at www.lakeforestbusiness.com. As shown in Figure 63, 35% of local businesses indicated that they had visited the site, which represents a statistically significant increase from 2010.

When compared with their respective counterparts, businesses that had operated in the City between 5 and 9 years, Lake Forest residents, men, and those with businesses classified as home-operated or industrial were the most likely to report having visited the City’s economic development website (see Figure 64).

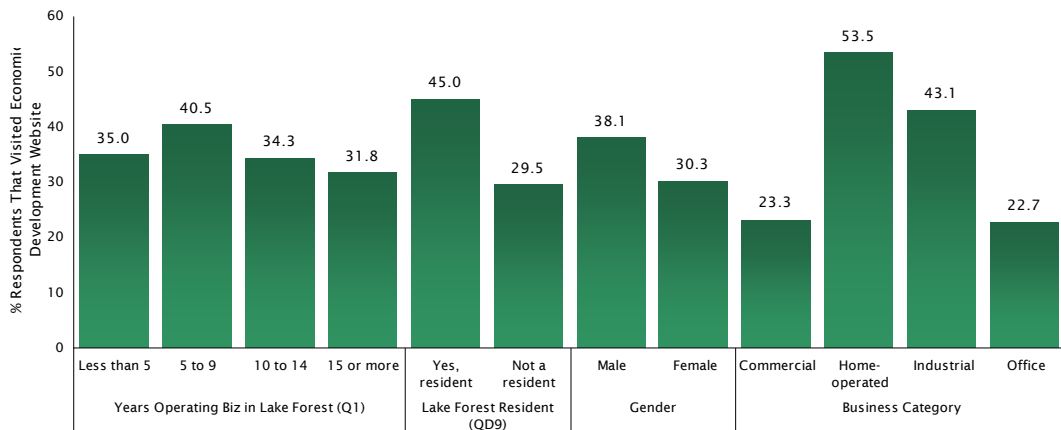
Question 15: Business Survey *Have you ever visited the City's economic development website at www.lakeforestbusiness.com?*

FIGURE 63 VISITED ECONOMIC DEVELOPMENT WEBSITE (2012 ~ 2010)



† Statistically significant change ($p < 0.05$) between the 2010 and 2012 studies.

FIGURE 64 VISITED ECONOMIC DEVELOPMENT WEBSITE BY YEARS OPERATING BUSINESS IN LAKE FOREST, 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 65, respondents expressed the highest levels of interest in news stories on grand openings and ribbon-cuttings (80% very or somewhat interested), followed by a Shop and Dine directory of local businesses (79%) and Business and Financial Resource Guides (78%).

On the next page, Table 17 compares the level of interest between 2012 and 2010 and shows a general decline in interest between the two studies, with a statistically significant drop for a *Shop and Dine directory of local businesses*. Table 18 shows how interest in these topics varied by type of business and recent economic development website visit.

Question 16: 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 65 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE CONTENT

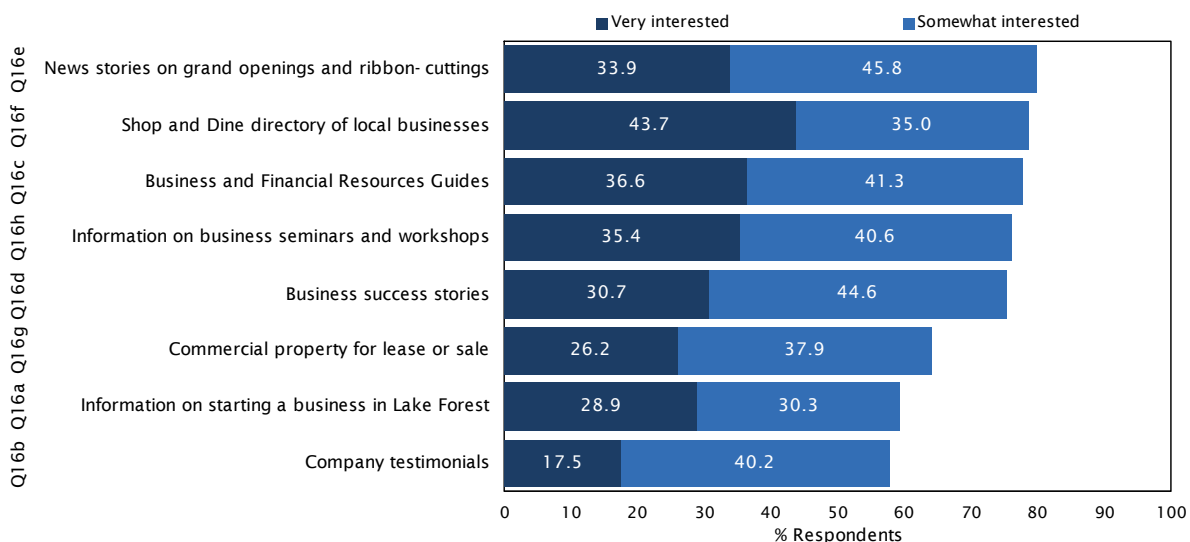


TABLE 17 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE CONTENT (2012 ~ 2010)

| | Study Year | | Change in Very + Smwt Interested |
|---|------------|------|----------------------------------|
| | 2012 | 2010 | |
| Business and Financial Resources Guides | 77.8 | 76.4 | + 1.5 |
| Business success stories | 75.3 | 78.0 | - 2.7 |
| Commercial property for lease or sale | 64.1 | 67.2 | - 3.1 |
| Company testimonials | 57.7 | 61.1 | - 3.4 |
| News stories on grand openings and ribbon- cuttings | 79.7 | 83.2 | - 3.5 |
| Information on starting a business in Lake Forest | 59.3 | 65.2 | - 5.9 |
| Information on business seminars and workshops | 76.0 | 83.3 | - 7.3 |
| Shop and Dine directory of local businesses | 78.6 | 87.6 | - 9.0† |

TABLE 18 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE CONTENT BY BUSINESS CATEGORY & VISITED ECONOMIC DEVELOPMENT WEBSITE (SHOWING % VERY INTERESTED)

| | Business Category | | | | Visited Economic Development Website (Q15) | |
|---|-------------------|---------------|------------|--------|--|------|
| | Commercial | Home-operated | Industrial | Office | Yes | No |
| Shop and Dine directory of local businesses | 43.6 | 39.5 | 38.1 | 50.0 | 50.3 | 40.1 |
| Business and Financial Resources Guides | 31.3 | 53.5 | 32.0 | 40.9 | 49.6 | 29.6 |
| Information on business seminars and workshops | 28.6 | 46.5 | 42.9 | 31.8 | 52.7 | 26.2 |
| News stories on grand openings and ribbon- cuttings | 37.4 | 27.9 | 23.3 | 36.4 | 45.0 | 28.0 |
| Business success stories | 28.4 | 39.5 | 35.2 | 31.8 | 47.7 | 21.6 |
| Information on starting a business in Lake Forest | 33.2 | 34.9 | 21.7 | 27.3 | 35.7 | 25.3 |
| Commercial property for lease or sale | 26.4 | 20.9 | 25.4 | 36.4 | 31.1 | 23.5 |
| Company testimonials | 19.5 | 20.9 | 11.9 | 22.7 | 22.6 | 14.8 |

IN BUSINESS NEWSLETTER One of the more recent innovations that the City of Lake Forest has developed to improve its communication with local businesses is the *In Business* newsletter, which is published twice per year. Among those surveyed, 35% recalled receiving the newsletter in the prior year (Figure 66), which is similar to the findings of 2010. Figure 67 displays the findings of this question by several demographic variables.

Question 17: 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 66 RECEIVED IN BUSINESS NEWSLETTER IN PAST YEAR

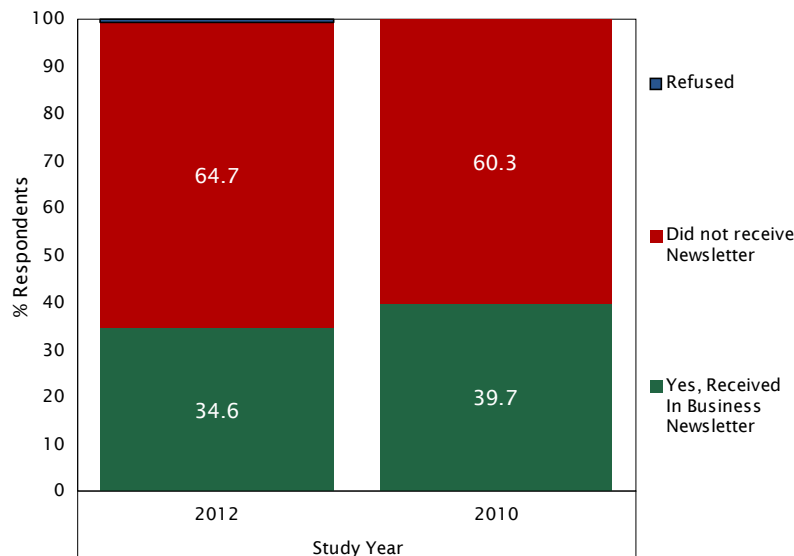
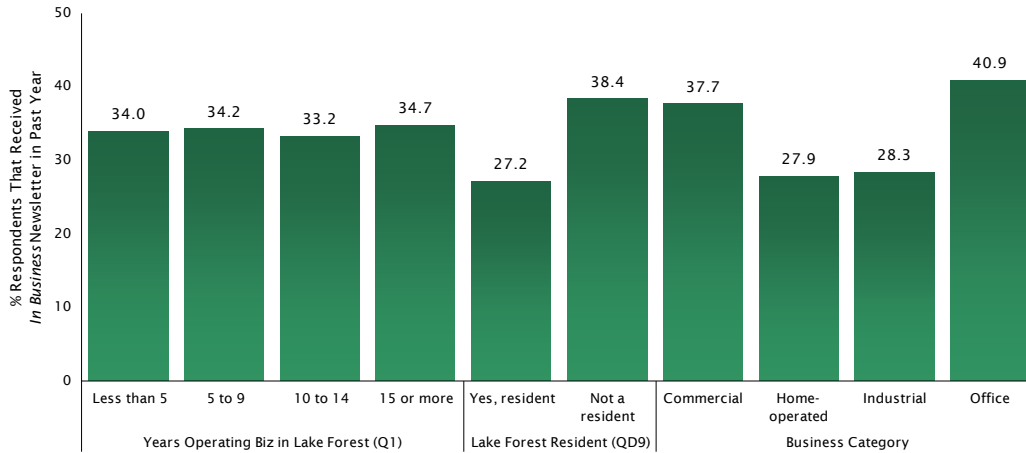


FIGURE 67 RECEIVED IN BUSINESS NEWSLETTER IN PAST YEAR BY YEARS OPERATING BUSINESS IN LAKE FOREST, LAKE FOREST RESIDENT & BUSINESS CATEGORY



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 (87%), market information (84%), and profiles of local companies (82%). There were no statistically significant changes in interest between 2010 and 2012 (see Table 19). Table 20 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 18: 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 68 INTEREST IN BUSINESS NEWSLETTER CONTENT

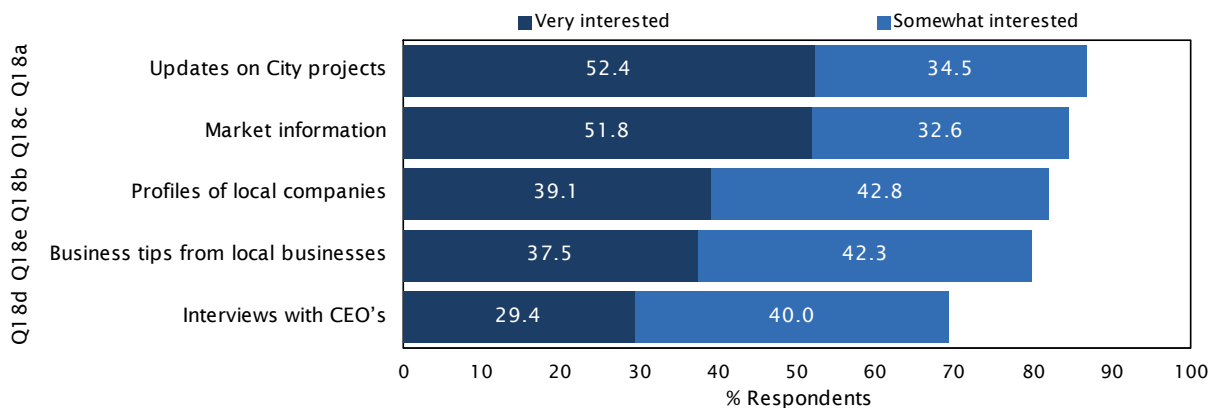


TABLE 19 INTEREST IN BUSINESS NEWSLETTER CONTENT (2012 ~ 2010)

| | Study Year | | Change in Very + Smwt Interested |
|-------------------------------------|------------|------|----------------------------------|
| | 2012 | 2010 | |
| Market information | 84.4 | 82.4 | + 2.1 |
| Interviews with CEO's | 69.4 | 70.2 | - 0.8 |
| Business tips from local businesses | 79.8 | 83.3 | - 3.4 |
| Updates on City projects | 86.9 | 90.4 | - 3.6 |
| Profiles of local companies | 82.0 | 87.2 | - 5.2 |

TABLE 20 INTEREST IN BUSINESS NEWSLETTER CONTENT BY BUSINESS CATEGORY & RECEIVED IN BUSINESS NEWSLETTER

| | Business Category | | | | Received In Business Newsletter (Q17) | |
|-------------------------------------|-------------------|---------------|------------|--------|---------------------------------------|------|
| | Commercial | Home-operated | Industrial | Office | Yes | No |
| Updates on City projects | 52.1 | 48.8 | 42.6 | 68.2 | 52.8 | 52.8 |
| Market information | 49.0 | 55.8 | 47.4 | 59.1 | 50.4 | 53.2 |
| Profiles of local companies | 38.6 | 41.9 | 32.3 | 36.4 | 39.0 | 39.6 |
| Business tips from local businesses | 38.5 | 53.5 | 31.7 | 31.8 | 32.9 | 40.4 |
| Interviews with CEO's | 30.4 | 37.2 | 27.8 | 22.7 | 24.9 | 32.1 |

Recognizing that the list of topics tested in Question 18 was fairly limited, Question 19 followed-up by asking respondents whether there were any additional topics that they would like addressed in the newsletter. Most (94% of) respondents desired no additional information in the newsletter. Of those who did, topics varied greatly, limiting the ability or need to categorize responses as presented elsewhere in this report. For the interested reader, a selection of the verbatim responses to the question is presented below.

Question 19: 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?*

- Government regulations and HR laws.
- How the city is going to help spur economic growth.
- Merchant circle stuff.
- General employment information, like what people are doing to recruit.
- Networking program that is free.
- How the City of Lake Forest is cutting red tape for local businesses.
- Demographics of the City.
- Job availability in the area.
- Adapting to the new technologies and getting information on meeting other business executives.
- Disabled parking issues. There could be updates on business laws and tax laws for small businesses, especially things that are changing.
- Financing, loan opportunity, small business loans, startup information, and money for small up-and-coming businesses.
- Marketing ideas for businesses.
- Regulatory assistance.
- New companies that move into Lake Forest.

- How to get the trash bills lower than they are right now.
- Please be more specific on the economic events in Foothill Ranch.
- The recycling program would be very helpful. It drives us crazy that we don't have a recycling complex at our office.

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 the City is considering for local businesses. The seminar topics and respondents' stated interest in each are shown in Figure 69.

Overall, Lake Forest businesses expressed the greatest interest in attending business marketing and sales workshops (72% very or somewhat interested), followed by workshops pertaining to business and networking (72%) and business legal issues (72%). When compared with 2010, interest in the workshops was generally higher, with statistically significant increases in payroll and tax reporting requirements, business finance, and business marketing and sales (see Table 21). Table 22 shows how the percentage of respondents who expressed being very interested in each seminar topic varied by category of business.

Question 20: 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 69 INTEREST IN BUSINESS WORKSHOP TOPICS

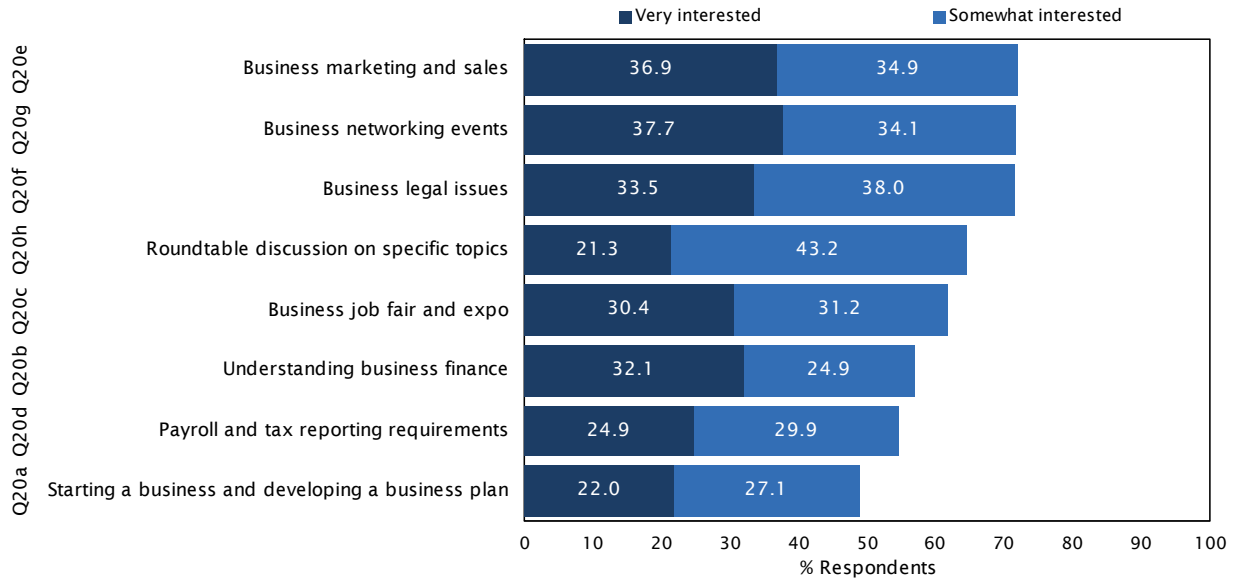


TABLE 21 INTEREST IN BUSINESS WORKSHOP TOPICS (2012 ~ 2010)

| | Study Year | | Change in Very + Smwt Interested |
|--|------------|------|--|
| | 2012 | 2010 | |
| Payroll and tax reporting requirements | 54.8 | 40.8 | +13.9† |
| Understanding business finance | 57.0 | 46.7 | +10.4† |
| Business marketing and sales | 71.9 | 62.0 | +9.9† |
| Business legal issues | 71.4 | 63.8 | +7.7 |
| Starting a business and developing a business plan | 49.0 | 44.6 | +4.4 |
| Business networking events | 71.8 | 69.3 | +2.5 |
| Roundtable discussion on specific topics | 64.5 | 65.1 | -0.6 |
| Business job fair and expo | 61.6 | 62.4 | -0.8 |

† Statistically significant change (p < 0.05) between the 2010 and 2012 studies.

TABLE 22 INTEREST IN BUSINESS WORKSHOP TOPICS (SHOWING % VERY INTERESTED) BY BUSINESS CATEGORY

| | Business Category | | | |
|--|-------------------|-------------------|------------|--------|
| | Commercial | Home- operated | Industrial | Office |
| Business networking events | 38.6 | 46.5 | 40.2 | 22.7 |
| Business marketing and sales | 33.2 | 46.5 | 41.3 | 27.3 |
| Business legal issues | 36.5 | 39.5 | 27.2 | 22.7 |
| Understanding business finance | 34.1 | 32.6 | 30.2 | 22.7 |
| Business job fair and expo | 32.6 | 27.9 | 22.8 | 31.8 |
| Payroll and tax reporting requirements | 26.6 | 23.3 | 18.3 | 27.3 |
| Starting a business and developing a business plan | 25.5 | 23.3 | 13.2 | 22.7 |
| Roundtable discussion on specific topics | 16.8 | 25.6 | 16.4 | 31.8 |

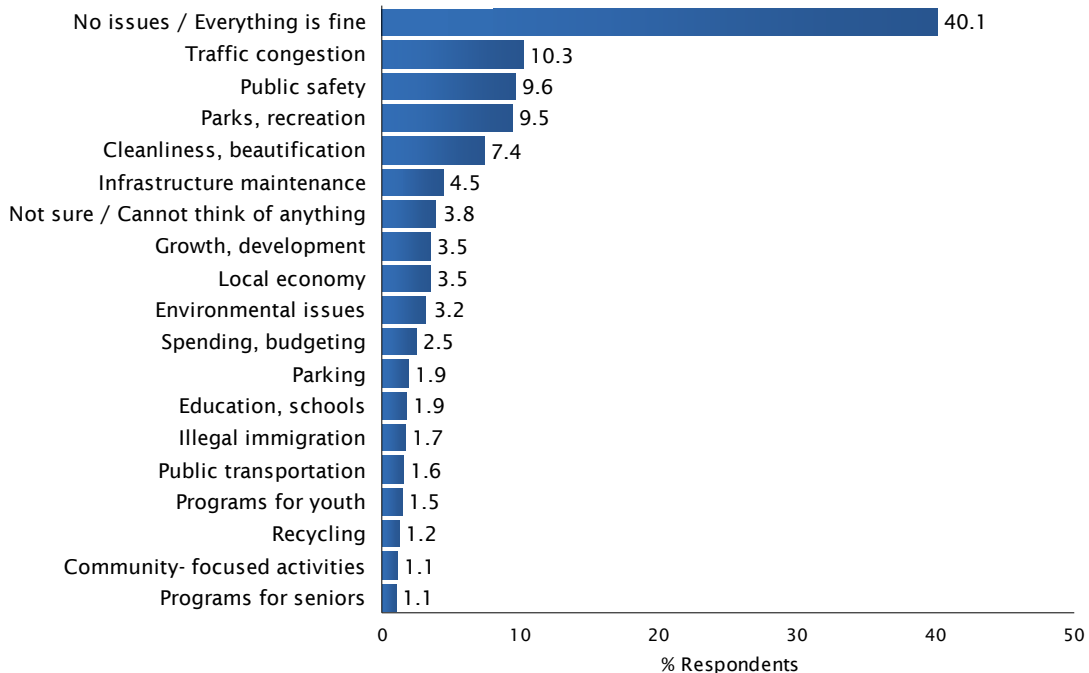
INFORMED TOP ISSUE

The final substantive question of the resident and business surveys asked respondents in an open-ended manner to identify any particular issues they would most like the City to focus on during the next two years. In previous studies for the City, a similar question was asked near the beginning of the survey, which was effective at gathering residents' and the business community's top of mind responses regarding local issues. Moving this question to the end of the survey in 2012 allowed respondents to provide a more thoughtful and informed opinion on the topic. That is, after thinking and talking about a wide variety of services and programs provided by the City, how well the City is meeting resident and business needs, as well as potential concerns with service provision that might arise during the interview, responses given to such a question provide a more in-depth profile of community opinion.

Similar to other verbatim questions asked in the resident and business surveys, the answers to this question were recorded and later grouped by True North into representative categories. The most commonly-mentioned categories are shown in figures 70 (Resident) and 71 (Business). In both cases, the most common response to this question was 'No issues / Everything is fine', mentioned by 40% of residents and 57% of business managers. Top specific issues cited among residents included traffic congestion (10%), public safety (10%), cleanliness and beautification (7%), and infrastructure maintenance (5%). Top specific issues cited among the business community included improving marketing, networking, and advertising opportunities (13%), economic growth and development (8%), traffic congestion (6%), and reducing taxes and fees (5%).

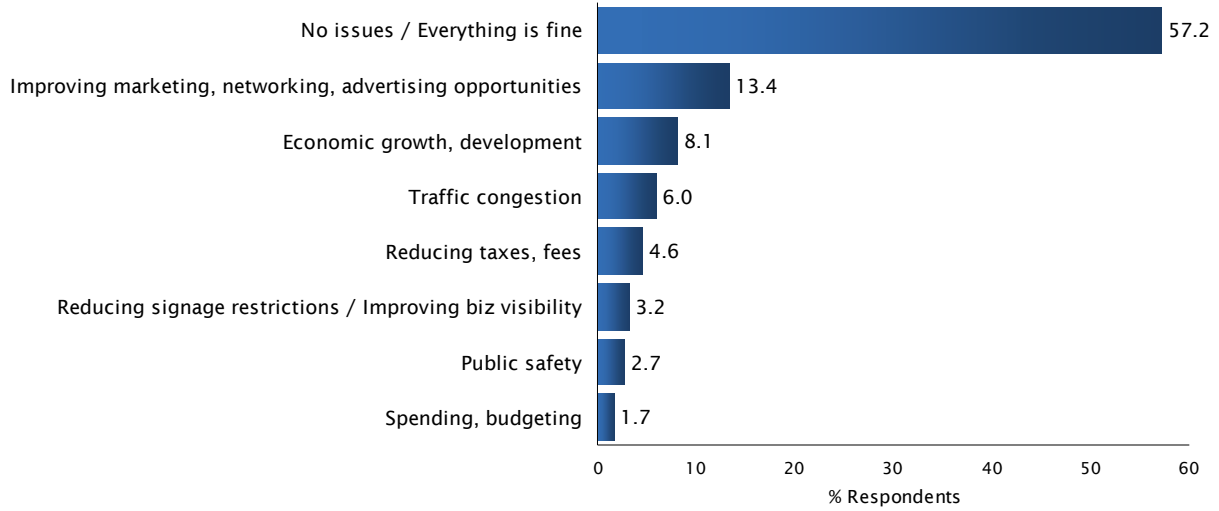
Question 27: Resident Survey *Now that we've had the opportunity to discuss a variety of topics and services in Lake Forest, is there a particular issue that you would most like the city government to focus on during the next two years?*

FIGURE 70 INFORMED TOP ISSUE: RESIDENT SURVEY



Question 21: Business Survey *Now that we've had the opportunity to discuss a variety of topics and services in Lake Forest, is there a particular issue that you would most like the city government to focus on during the next two years?*

FIGURE 71 INFORMED TOP ISSUE: BUSINESS SURVEY



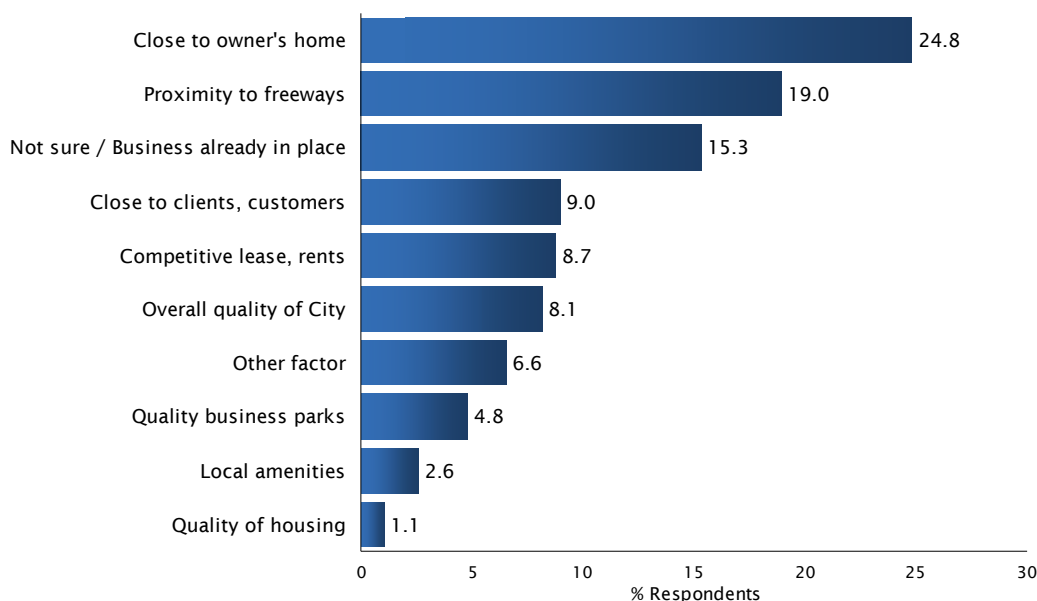
BUSINESS BACKGROUND INFO

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 (25%) indicated that it is close to the owner's home. Approximately 15% of respondents could not provide a response to this question, as the business was already in place when they became affiliated with it. Other specific reasons cited by at least 5% of respondents included the business' proximity to freeways and surrounding communities (19%), proximity to clients and potential customers (9%), competitive lease rates (9%), and the overall quality of the City (8%).

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?*

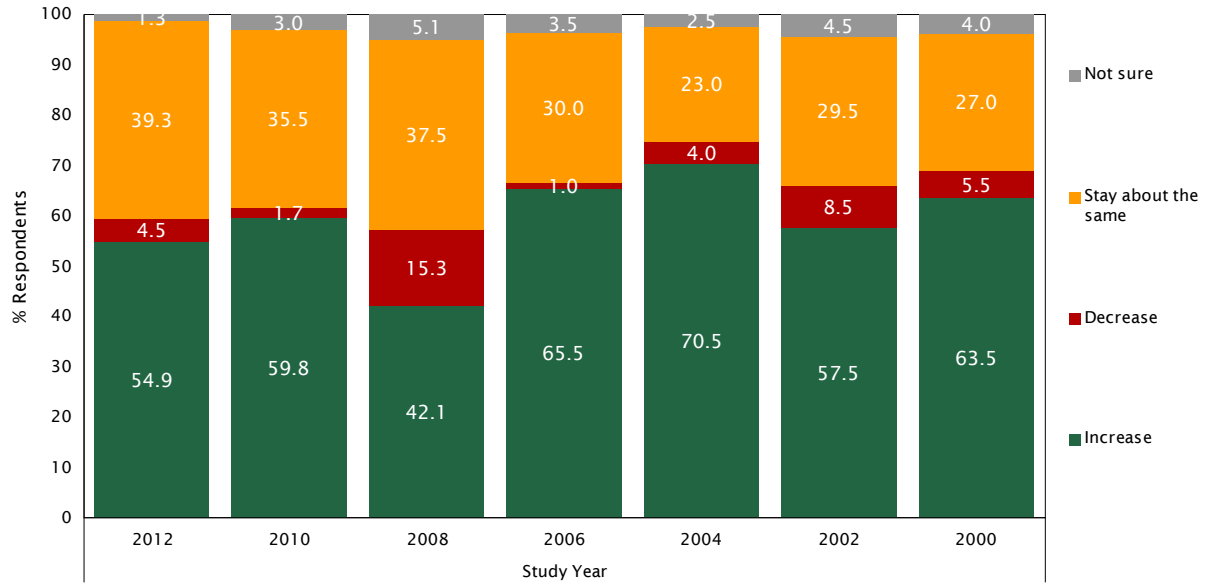
FIGURE 72 PRIMARY REASON FOR LOCATING BUSINESS IN LAKE FOREST



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 2012 are shown in Figure 73 on the next page. As in prior years, local businesses were generally optimistic about their future growth, with 55% anticipating growth and 39% expecting that their business would remain about the same. Just 5% indicated that they expect their business to decrease in the coming year.

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

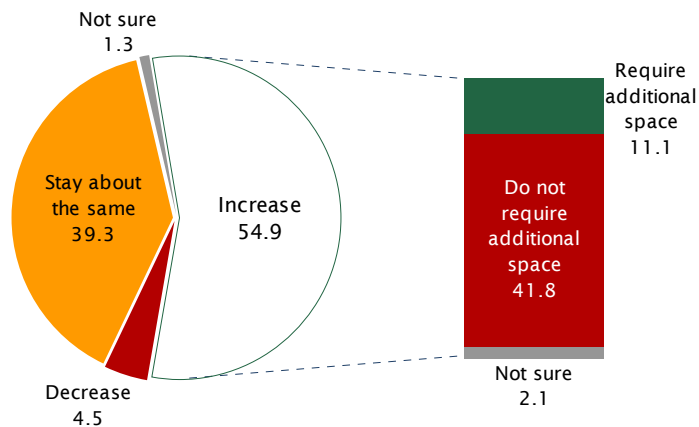
FIGURE 73 BUSINESS SIZE IN NEXT 12 MONTHS (2012 ~ 2000)



Among the 55% of businesses that anticipated growth, 11% indicated that they would require additional space whereas the remaining 44% were either unsure or did not anticipate needing additional space (Figure 74).

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

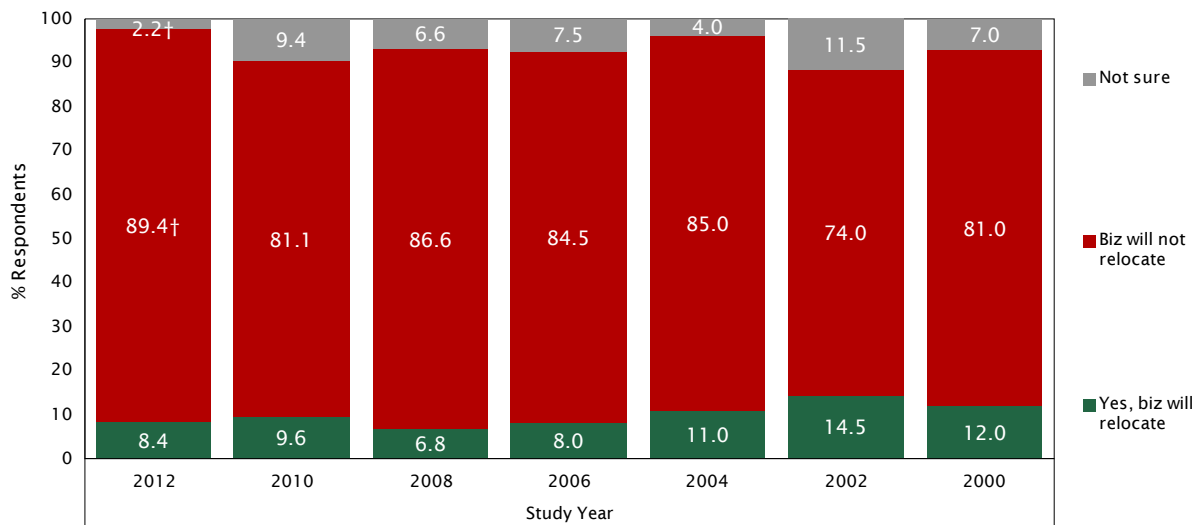
FIGURE 74 BUSINESS SIZE AND SQUARE FOOTAGE REQUIREMENTS IN NEXT 12 MONTHS



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 75 shows the proportion of businesses that anticipated relocating in 2012 was 85%, which is similar to the rate recorded since 2006, but lower than in prior years. There was, however, a statistically significant decrease in the percentage of respondents who were *unsure* and an increase who said their businesses would *not* be relocating. Of the 8% of businesses that anticipated relocating in the next year, approximately half (4%) expected to relocate to another community, 4% within Lake Forest, and 1% were unsure (Figure 76).

Question D6: Business Survey *In the next 12 months, do you think your business will relocate?*

FIGURE 75 BUSINESS RELOCATION IN NEXT 12 MONTHS (2012 ~ 2010)



† Statistically significant change ($p < 0.05$) between the 2010 and 2012 studies.

Question D7: Business Survey *Will you be relocating your business within Lake Forest or to another community?*

FIGURE 76 BUSINESS RELOCATION IN NEXT 12 MONTHS

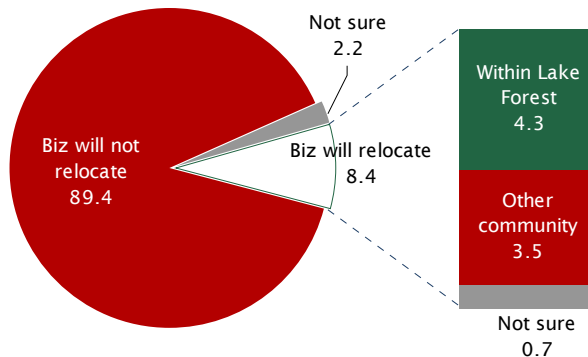


TABLE 23 SAMPLE DEMOGRAPHICS: BUSINESS SURVEY (2012 ~ 2000)

| Study Year | 2012 | 2010 | 2008 | 2006 | 2004 | 2002 | 2000 |
|---|------------|------------|------------|------------|------------|------------|------------|
| Total Respondents | 200 | 200 | 200 | 200 | 200 | 200 | 200 |
| QD1 Number of employees | | | | | | | |
| 1 | 14.2 | 20.8 | N/A | N/A | N/A | N/A | N/A |
| 2 to 5 | 34.9 | 37.1 | N/A | N/A | N/A | N/A | N/A |
| 6 to 10 | 17.0 | 12.7 | N/A | N/A | N/A | N/A | N/A |
| More than 10 | 31.7 | 26.7 | N/A | N/A | N/A | N/A | N/A |
| Refused | 2.2 | 2.7 | N/A | N/A | N/A | N/A | N/A |
| QD2 Number of employees live outside Lake Forest | | | | | | | |
| None | 15.1 | 27.2 | N/A | N/A | N/A | N/A | N/A |
| 1 | 15.5 | 11.0 | N/A | N/A | N/A | N/A | N/A |
| 2 to 5 | 29.3 | 28.3 | N/A | N/A | N/A | N/A | N/A |
| 6 to 10 | 14.6 | 10.9 | N/A | N/A | N/A | N/A | N/A |
| More than 10 | 20.7 | 19.5 | N/A | N/A | N/A | N/A | N/A |
| Refused | 4.8 | 3.1 | N/A | N/A | N/A | N/A | N/A |
| QD9 Resident of Lake Forest | | | | | | | |
| Yes | 34.2 | 47.2 | 34.5 | 30.5 | 23.5 | 42.5 | N/A |
| No | 65.8 | 52.8 | 63.5 | 68.5 | 76.5 | 55 | N/A |
| Refused | 0.0 | 0.0 | 2.0 | 1.0 | 0.0 | 2.5 | N/A |
| Q51 Gender | | | | | | | |
| Male | 58.1 | 64.1 | 58.0 | 58.0 | 57.0 | 68.0 | 71.0 |
| Female | 41.9 | 35.9 | 42.0 | 42.0 | 43.0 | 32.0 | 29.0 |
| Q52 Business category | | | | | | | |
| C- FR | 7.5 | 6.2 | 8.5 | 6.0 | 4.5 | 4.5 | N/A |
| C- Southwest | 10.0 | 12.6 | 8.5 | 8.5 | 8.0 | 8.0 | N/A |
| C- Midcity | 12.5 | 11.7 | 8.0 | 8.0 | 8.5 | 10.0 | N/A |
| C- RDA | 12.5 | 7.7 | 10.5 | 11.0 | 11.5 | 12.5 | N/A |
| Home- operated | 15.0 | 27.3 | 15.0 | 12.5 | 12.5 | 13.0 | N/A |
| I- AspanLambert | 5.0 | 4.6 | 9.0 | 8.0 | 10.5 | 12.0 | N/A |
| I- Midcity | 10.0 | 2.6 | 12.5 | 13.0 | 18.0 | 20.5 | N/A |
| I- FRPH | 5.0 | 10.3 | 3.5 | 4.0 | 4.5 | 4.0 | N/A |
| I- RDA | 2.5 | 1.4 | 2.5 | 2.0 | 2.5 | 2.5 | N/A |
| Office | 15.0 | 12.6 | 11.5 | 17.5 | 17.5 | 11.0 | N/A |
| Other | 5.0 | 3.0 | 10.5 | 9.5 | 2.0 | 2.0 | N/A |

Table 23 provides information that was collected from local businesses during the 2012 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 24 SAMPLE DEMOGRAPHICS: RESIDENT SURVEY (2012 ~ 2002)

| Study Year | 2012 | 2010 | 2008 | 2006 | 2004 | 2002 |
|---------------------------------|------|------|------|------|------|------|
| Total Respondents | 400 | 400 | 400 | 400 | 400 | 400 |
| QD1 Employment status | | | | | | |
| Employed full- time | 56.5 | 51.2 | 54.6 | 58.5 | N/A | N/A |
| Employed part- time | 10.6 | 9.1 | 13.7 | 11.0 | N/A | N/A |
| Student | 5.5 | 3.6 | 2.6 | 3.7 | N/A | N/A |
| Homemaker | 3.2 | 5.0 | 8.4 | 7.9 | N/A | N/A |
| Retired | 18.1 | 19.2 | 13.6 | 16.0 | N/A | N/A |
| In- between jobs | 4.7 | 9.0 | 6.0 | 1.9 | N/A | N/A |
| Refused | 1.5 | 2.9 | 0.9 | 1.1 | N/A | N/A |
| QD2 Child in home | | | | | | |
| Yes | 38.7 | 43.9 | 41.3 | 43.4 | 44.5 | 44.8 |
| No | 59.8 | 54.0 | 58.5 | 56.4 | 55.0 | 54.3 |
| Refused | 1.5 | 2.1 | 0.2 | 0.2 | 0.5 | 1.0 |
| QD3 Live in HOA | | | | | | |
| Yes | 73.8 | 75.6 | 74.8 | 73.3 | 72.8 | 73.3 |
| No | 24.5 | 22.2 | 24.4 | 25.6 | 26.0 | 25.3 |
| Refused | 1.7 | 2.2 | 0.8 | 1.1 | 1.3 | 1.5 |
| QD4 Household income | | | | | | |
| Under \$40K | 10.7 | 10.6 | 8.1 | 7.0 | 9.5 | 11.5 |
| \$40K to \$59K | 13.7 | 11.8 | 10.1 | 10.3 | 14.8 | 15.3 |
| \$60K to \$79K | 10.1 | 13.4 | 13.9 | 16.8 | 21.0 | 12.8 |
| \$80K to \$99K | 12.7 | 15.8 | 15.9 | 10.7 | 13.3 | 17.0 |
| \$100K or more | 39.9 | 36.0 | 36.6 | 42.4 | 31.3 | 29.3 |
| Not sure / Refused | 12.9 | 12.5 | 15.4 | 12.9 | 10.3 | 14.3 |
| QD5 Gender | | | | | | |
| Male | 47.7 | 47.7 | 47.7 | 47.5 | 49.8 | 49.3 |
| Female | 52.3 | 52.3 | 52.3 | 52.5 | 50.3 | 50.8 |
| S1 Party | | | | | | |
| Democrat | 28.0 | 26.7 | 26.9 | 25.5 | 28.3 | 26.5 |
| Republican | 44.8 | 49.6 | 50.2 | 52.5 | 50.3 | 54.8 |
| Other | 3.5 | 4.9 | 4.4 | 5.1 | 4.3 | 4.8 |
| DTS | 23.6 | 18.8 | 18.5 | 17.0 | 17.3 | 14.0 |
| S2 Age | | | | | | |
| 18 to 29 | 15.3 | 11.1 | 13.4 | 13.4 | 14.5 | 14.8 |
| 30 to 39 | 15.2 | 15.3 | 17.2 | 16.9 | 20.8 | 22.8 |
| 40 to 49 | 21.1 | 23.9 | 25.9 | 26.9 | 28.8 | 26.5 |
| 50 to 64 | 31.5 | 32.2 | 28.6 | 29.9 | 23.8 | 23.5 |
| 65 and older | 16.9 | 17.5 | 14.9 | 13.0 | 12.3 | 12.3 |
| S6 Home Ownership status | | | | | | |
| Own | 69.5 | 79.9 | 72.0 | 75.3 | 66.5 | N/A |
| Rent | 30.5 | 20.1 | 28.0 | 24.7 | 33.5 | N/A |

Table 24 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 77) identify the skip patterns that were used during the interview to ensure that each respondent received the appropriate questions.

Most of the questions asked in the 2012 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 2,280 companies that appear in the City's business database with viable contact information. Because of the large percentage of home-based businesses in the City, the sample was not drawn in a strictly proportional manner. A total of 30 interviews were collected among home-based businesses, with the remaining 170 interviews drawn proportionately from non home-based businesses stratified according to their type and location within the City. The groups were as follows:

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

MARGIN OF ERROR By using stratified and clustered samples and monitoring the sample characteristics as data collection proceeded, True North ensured that the samples were representative of registered voters and business managers in the City of Lake Forest.³ The results of the surveys can thus be used to estimate the opinions of *all* registered voters and businesses in the City. Because not every voter and business in the City participated, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found, for example, in the survey of 400 voters for a particular question and what would have been found if all 44,662 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 9 of the resident survey), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence level, and the distribution of responses to the question. The appropriate equation for estimating the margin of error, in this case, is shown below:

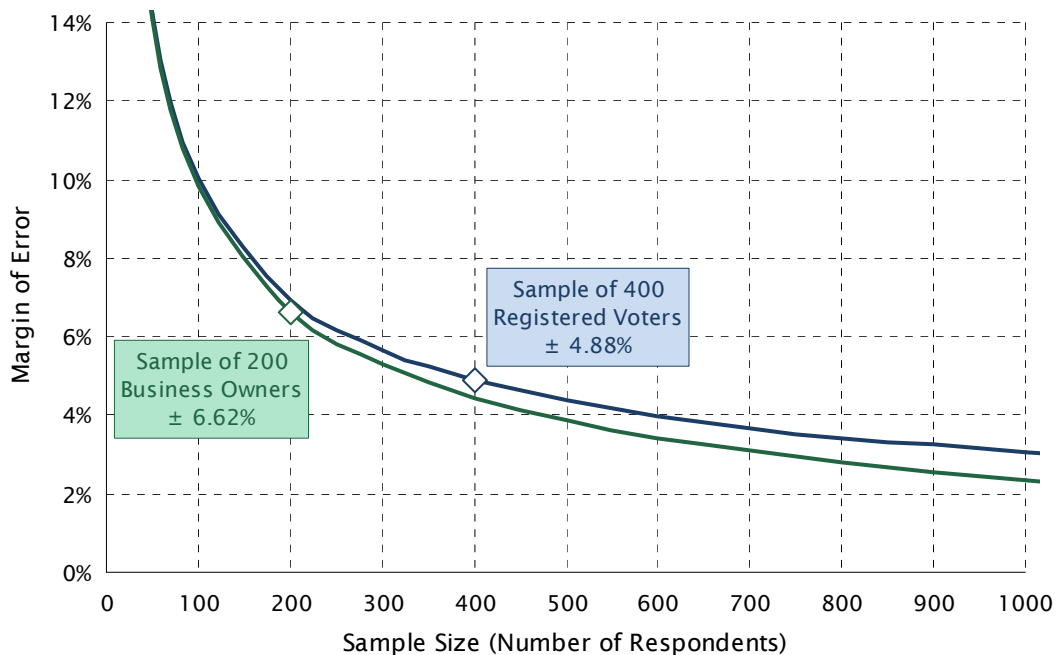
$$\hat{p} \pm t \sqrt{\left(\frac{N-n}{N}\right) \frac{\hat{p}(1-\hat{p})}{n-1}}$$

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

where \hat{p} is the proportion of voters who have interacted with the Department in the past year (0.1 for 10% in this example), N is the population size of all registered voters (44,662), 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 77 presents the margin of error equation as a graph, plotting sample sizes along the bottom axis. There are two lines represented in the graph, which partially overlap—one for the resident survey and one for the business survey. As seen in the figure, the maximum margin of error in the telephone survey for questions answered by all 400 registered voters is $\pm 4.88\%$, whereas the maximum margin of error for questions answered by all 200 business owners is $\pm 6.62\%$.

FIGURE 77 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 77 above is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

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 2012 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 September 27 and October 2, 2012. 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 21 minutes in length.

The business survey was also administered via telephone and via the web. Calls were made during normal business hours between November 2, 2012 and November 29, 2012, although interviewing was suspended over the Thanksgiving holiday. The business interviews averaged 18 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 2010 and 2012 was due to an actual change in opinions or was likely an artifact of independently drawn cross-sectional samples.

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

QUESTIONNAIRES & TOPLINES

RESIDENT SURVEY



City of Lake Forest
Voter Survey Final Toplines
October 2012

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 | 19% |
| 2 | 5 years to less than 10 years | 19% |
| 3 | 10 years to less than 15 years | 21% |
| 4 | 15 or more years | 40% |
| 99 | Refused | 0% |
| Q2 | 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 | 55% |
| 2 | Good | 42% |
| 3 | Fair | 3% |
| 4 | Poor | 1% |
| 5 | Very Poor | 0% |
| 98 | Not sure | 0% |
| 99 | Refused | 0% |

| Q3 | If the city government could do one thing to make Lake Forest a better place to live now and in the future, what would you like to see? Verbatim responses recorded and later grouped into categories shown below. | |
|----|--|-----|
| | No changes needed | 23% |
| | Improve parks, recreation | 13% |
| | Not sure / Cannot think of anything | 13% |
| | Reduce traffic congestion | 11% |
| | Improve, repair infrastructure | 6% |
| | Improve public safety | 5% |
| | Clean up, improve appearance | 3% |
| | Improve education | 3% |
| | Limit growth, development | 3% |
| | Attract, encourage new development | 3% |
| | Reduce taxes, fees | 2% |
| | Provide more public transit | 2% |
| | Provide more affordable housing | 2% |
| | Improve environmental efforts | 2% |
| | Provide more community-focused events | 2% |
| | Provide more parking | 1% |
| | Attract new restaurants | 1% |
| | Address illegal immigration issue | 1% |
| | Provide more options for youth | 1% |
| | Provide more senior services, programs | 1% |
| | Support, assist local businesses | 1% |
| | Address El Toro stadium issue | 1% |
| | Improve outreach, communication | 1% |
| 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:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)? | |
| | 1 Very satisfied | 63% |
| | 2 Somewhat satisfied | 31% |
| | 3 Somewhat dissatisfied | 1% |
| | 4 Very dissatisfied | 2% |
| | 98 Not sure | 3% |
| | 99 Refused | 0% |

| Section 3: Police Department | | | | | | | |
|------------------------------|--|--|--------------------|-----------------------|-------------------|------------|---------|
| Q5 | | 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 | 16% | 43% | 34% | 6% | 1% | 0% |
| B | Investigating criminal activity | 41% | 52% | 5% | 1% | 1% | 0% |
| C | Providing child safety programs | 23% | 48% | 20% | 7% | 3% | 0% |
| D | Enforcing traffic laws | 18% | 50% | 26% | 5% | 1% | 0% |
| E | Maintaining a low crime rate | 41% | 54% | 4% | 0% | 1% | 0% |
| F | Preparing for emergencies | 33% | 51% | 13% | 2% | 1% | 0% |
| G | Providing crossing guards near schools | 21% | 48% | 24% | 6% | 0% | 0% |
| H | Providing animal control services | 9% | 35% | 43% | 11% | 1% | 0% |
| Q6 | | 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 | 38% | 33% | 6% | 2% | 20% | 1% |
| B | Investigate criminal activity | 51% | 28% | 3% | 3% | 14% | 0% |
| C | Provide child safety programs | 38% | 27% | 3% | 1% | 30% | 1% |
| D | Enforce traffic laws | 53% | 34% | 4% | 2% | 7% | 0% |
| E | Maintain a low crime rate | 69% | 22% | 3% | 1% | 4% | 0% |
| F | Prepare for emergencies | 41% | 29% | 3% | 2% | 23% | 41% |
| G | Provide crossing guards near schools | 62% | 20% | 2% | 0% | 15% | 1% |
| H | Provide animal control services | 43% | 37% | 4% | 3% | 13% | 1% |

| Section 4: Development Services | | | | | | | |
|---------------------------------|------------------------------|--|--------------------|-----------------------|-------------------|------------|---------|
| Q7 | | 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 | 9% | 41% | 29% | 12% | 8% | 0% |
| B | Inspecting buildings | 12% | 47% | 27% | 8% | 6% | 0% |
| C | Enforcing zoning regulations | 11% | 41% | 30% | 11% | 7% | 0% |
| D | Enforcing sign regulations | 7% | 35% | 32% | 19% | 7% | 0% |
| Q8 | | 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 | 29% | 24% | 3% | 1% | 42% | 1% |
| B | Inspect buildings | 29% | 25% | 3% | 1% | 41% | 1% |
| C | Enforce zoning regulations | 35% | 26% | 4% | 3% | 33% | 0% |
| D | Enforce sign regulations | 34% | 26% | 4% | 1% | 35% | 0% |
| Q9 | | 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 | 90% | | | | |
| | 98 | Not sure | 1% | | | | |
| | 99 | Refused | 0% | | | | |

| Section 5: Public Works Department | | | | | | | |
|------------------------------------|--|---|--------------------|-----------------------|-------------------|------------|---------|
| Q10 | | Next, I'd like to ask about several services provided by the Public Works Department. For each of the following, please tell me whether the service is extremely important to you, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important? | | | | | |
| | | Extremely Important | Very Important | Somewhat Important | Not too Important | No Opinion | Refused |
| <i>Randomize</i> | | | | | | | |
| A | Street sweeping | 14% | 45% | 33% | 7% | 1% | 0% |
| B | Maintaining trees | 20% | 51% | 25% | 4% | 0% | 0% |
| C | Preventing storm-water pollution | 27% | 52% | 16% | 3% | 2% | 0% |
| D | Reducing traffic congestion | 29% | 55% | 13% | 3% | 1% | 0% |
| E | Maintaining local streets and roads | 31% | 59% | 10% | 1% | 0% | 0% |
| F | Providing bike paths and pedestrian facilities | 24% | 44% | 25% | 5% | 1% | 0% |
| G | Maintaining parks and picnic areas | 27% | 53% | 18% | 1% | 0% | 0% |
| H | Maintaining public landscapes | 19% | 49% | 27% | 4% | 1% | 0% |
| I | Providing garbage collection services | 32% | 58% | 6% | 1% | 2% | 1% |
| J | Providing recycling services | 24% | 47% | 21% | 6% | 0% | 1% |
| Q11 | | 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> | | | | | |
| | | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Very Dissatisfied | No Opinion | Refused |
| <i>Randomize</i> | | | | | | | |
| A | Provide street sweeping services | 60% | 27% | 4% | 1% | 8% | 0% |
| B | Maintain trees | 60% | 27% | 4% | 3% | 5% | 0% |
| C | Prevent storm-water pollution | 40% | 32% | 3% | 0% | 24% | 1% |
| D | Reduce traffic congestion | 36% | 41% | 10% | 6% | 6% | 0% |
| E | Maintain local streets and roads | 62% | 29% | 6% | 2% | 1% | 0% |
| F | Provide bike paths and pedestrian facilities | 59% | 30% | 2% | 2% | 7% | 0% |
| G | Maintain parks and picnic areas | 63% | 31% | 2% | 1% | 3% | 0% |
| H | Maintain public landscapes | 65% | 27% | 3% | 2% | 3% | 0% |
| I | Provide garbage collection services | 77% | 16% | 1% | 0% | 5% | 1% |
| J | Provide recycling services | 56% | 28% | 4% | 3% | 8% | 1% |

| Q12 | | The City is considering expanding its curbside recycling program. Would you say your household has a great need, moderate need, little need, or no need to recycle: -----? | | | | | |
|------------------|-----------------------|--|---------------|-------------|---------|------------|---------|
| <i>Randomize</i> | | Great need | Moderate need | Little need | No need | No Opinion | Refused |
| A | All types of plastics | 38% | 35% | 13% | 11% | 2% | 0% |
| B | Household batteries | 21% | 25% | 29% | 22% | 3% | 0% |
| C | Food waste | 23% | 31% | 22% | 20% | 4% | 1% |

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 | 22% | 48% | 20% | 9% | 2% | 0% |
| B | Providing recreation programs for pre-school children | 16% | 38% | 29% | 13% | 3% | 0% |
| C | Providing recreation and sports programs for elementary school-aged children | 22% | 45% | 24% | 6% | 2% | 0% |
| D | Providing recreation and sports programs for teens | 21% | 45% | 24% | 8% | 2% | 0% |
| E | Providing adult recreation programs such as classes, concerts and trips | 10% | 28% | 42% | 18% | 2% | 0% |
| F | Providing adult sports programs | 10% | 21% | 43% | 25% | 2% | 0% |
| G | Providing recreation programs for seniors | 18% | 35% | 33% | 11% | 2% | 0% |
| H | Providing recreation programs for families | 12% | 37% | 35% | 13% | 2% | 0% |
| I | Providing special events like concerts in the park and the Fourth of July Parade | 18% | 40% | 31% | 10% | 1% | 0% |
| J | Providing recreation programs for special needs children | 24% | 48% | 19% | 6% | 3% | 0% |
| K | Providing summer-specific recreation programs such as camps | 18% | 34% | 33% | 11% | 3% | 0% |

| | | | | | | | |
|--|--|----------------|--------------------|-----------------------|-------------------|------------|---------|
| <p>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.</p> <p>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></p> | | | | | | | |
| <i>Randomize</i> | | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Very Dissatisfied | No Opinion | Refused |
| A | Provide after school recreation programs | 34% | 32% | 5% | 1% | 29% | 0% |
| B | Provide recreation programs for pre-school children | 30% | 27% | 4% | 1% | 37% | 0% |
| C | Provide recreation and sports programs for elementary school-aged children | 35% | 31% | 3% | 3% | 28% | 0% |
| D | Provide recreation and sports programs for teens | 32% | 31% | 6% | 1% | 30% | 0% |
| E | Provide adult recreation programs such as classes, concerts and trips | 34% | 34% | 5% | 3% | 24% | 0% |
| F | Provide adult sports programs | 25% | 32% | 5% | 4% | 35% | 0% |
| G | Provide recreation programs for seniors | 30% | 29% | 3% | 1% | 36% | 0% |
| H | Provide recreation programs for families | 28% | 36% | 4% | 2% | 30% | 0% |
| I | Provide special events like concerts in the park and the Fourth of July Parade | 56% | 28% | 3% | 1% | 12% | 0% |
| J | Provide recreation programs for special needs children | 18% | 31% | 5% | 3% | 42% | 1% |
| K | Provide summer-specific recreation programs such as camps | 27% | 35% | 2% | 2% | 33% | 0% |

| | | | | | | | |
|---|--|---------------|-----------------|--------------|------------------------------|------------|---------|
| Section 7: Civic Center | | | | | | | |
| <p>Q15 The City of Lake Forest currently leases the City Hall building and property, but is planning to build a <i>permanent</i> Civic Center in the near future that will include a variety of amenities to better serve residents.</p> <p>As I read each of the following amenities, I'd like you to indicate whether you think the amenity should be a high, medium or low priority for inclusion in the Civic Center – or if you think it should not be a part of the Civic Center. Please keep in mind that not all of the amenities can be high priorities.</p> <p>Here is the (first/next) one: _____. Should this amenity be a high, medium or low priority for the Center – or should the Center not include this amenity?</p> | | | | | | | |
| <i>Randomize</i> | | High Priority | Medium Priority | Low Priority | Should not include in Center | No Opinion | Refused |
| A | General purpose rooms that can be used for meetings, conferences and classes | 38% | 43% | 13% | 3% | 1% | 0% |

| | | | | | | | |
|-----|--|-----|-----|-----|----|----|----|
| B | Special purpose rooms that can be used for activities like arts and crafts, dance, and aerobics | 30% | 47% | 17% | 4% | 1% | 0% |
| C | Community Policing Center | 44% | 30% | 15% | 4% | 6% | 0% |
| D | Performing Arts Center that will host concerts and plays | 42% | 34% | 17% | 5% | 1% | 1% |
| E | Public art displays like fountains, murals and statues | 19% | 42% | 31% | 6% | 2% | 0% |
| F | Banquet facilities that can be rented for wedding receptions and special events | 24% | 36% | 29% | 9% | 1% | 0% |
| G | Computer lab for drop-in and classroom use | 40% | 32% | 19% | 7% | 2% | 0% |
| H | Senior Center | 49% | 37% | 10% | 3% | 1% | 0% |
| Q16 | Are there any amenities not included in the previous list that you would be very interested in having included in the new Civic Center? <i>If yes, ask: Please briefly describe the amenity you would most want included. Verbatim responses recorded and later grouped into categories shown below.</i> | | | | | | |
| | No other amenities | 74% | | | | | |
| | School, education programs | 3% | | | | | |
| | City offices, services | 3% | | | | | |
| | Pool | 3% | | | | | |
| | Sports, athletic facilities in general | 3% | | | | | |
| | Library | 2% | | | | | |
| | Teen, children programs | 2% | | | | | |
| | Community gathering areas, events | 2% | | | | | |
| | Dog park | 1% | | | | | |
| | Senior programs, services | 1% | | | | | |
| | Medical center, services | 1% | | | | | |
| | Basketball courts | 1% | | | | | |
| | Opposed to Civic Center | 1% | | | | | |
| | Prefer not to answer | 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 | 38% | Skip to Q20 |
| | 2 | Somewhat satisfied | 20% | Skip to Q20 |
| | 3 | Somewhat dissatisfied | 7% | Ask Q18 |
| | 4 | Very dissatisfied | 8% | Ask Q18 |
| | 98 | No opinion | 28% | Skip to Q20 |
| 99 | Refused | 0% | Skip to Q20 | |
| 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.</i> | | | |
| | 1 | No particular issue | 4% | Skip to Q20 |
| | 2 | Parking | 46% | Ask Q19 |
| | 3 | Unkempt houses/yards | 10% | Skip to Q20 |
| | 4 | Too many people per house | 10% | Skip to Q20 |
| | 5 | Speeding/reckless vehicles | 3% | Skip to Q20 |
| | 6 | Other (unique responses) | 24% | Skip to Q20 |
| | 98 | Not sure | 2% | Skip to Q20 |
| | 99 | Refused | 1% | Skip to Q20 |
| Q19 | You mentioned parking as a problem. Can you describe in a bit more detail how parking is a problem in your neighborhood? <i>Verbatim responses recorded and later grouped into categories shown below.</i> | | | |
| | Too many cars parked on street | | 45% | |
| | Residents should use garages, driveways | | 20% | |
| | Cars not moved for long period of time | | 28% | |
| | Cars parked in unsafe, illegal locations | | 17% | |
| | Concern with parking permits | | 7% | |

| Section 9: City-Resident Communication | | | |
|--|--|--|-----|
| Q20 | Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means? <i>Get answer, then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i> | | |
| | 1 | Very satisfied | 52% |
| | 2 | Somewhat satisfied | 29% |
| | 3 | Somewhat dissatisfied | 7% |
| | 4 | Very dissatisfied | 6% |
| | 98 | Don't Know | 7% |
| | 99 | Refused | 0% |
| Q21 | 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 | 5% |
| | 2 | Orange County Register | 11% |
| | 3 | Los Angeles Times | 1% |
| | 4 | The Leaflet - City Newsletter | 39% |
| | 5 | Leisure Times - City Newsletter | 4% |
| | 6 | City Newsletter - no mention of Leaflet or Leisure Times | 20% |
| | 7 | E-newsletter - electronic newsletter | 5% |
| | 8 | Redevelopment Newsletter / 'A View from the Arbor' | 0% |
| | 9 | Lake Forest Patch - <i>the Patch</i> | 2% |
| | 10 | City Council Meetings | 0% |
| | 11 | Radio | 0% |
| | 12 | Television | 2% |
| | 13 | Internet, not a City site | 21% |
| | 14 | City Website (not specific) | 15% |
| | 15 | The Arbor (redevelopment) | 0% |
| | 16 | Skatepark site (Etnies) | 0% |
| | 17 | Lake Forest Seniors site | 0% |
| | 18 | Lake Forest Teens site | 1% |
| | 19 | Main City Web Page/ Ask Lake Forest | 5% |
| | 20 | Economic Development site/Lake Forest Business | 0% |
| | 21 | Flyers at City Facilities | 7% |
| | 22 | Friends / Other People | 4% |

| | | | | |
|-----|--|--|-----|-------------|
| | 23 | Facebook/Twitter or other social media | 1% | |
| | 24 | Other | 0% | |
| | 25 | Do Not Receive Information about City | 4% | |
| | 98 | Not sure | 3% | |
| | 99 | Refused | 0% | |
| Q22 | Which do you use most often to access information online: a home computer or laptop, a smart phone, or a tablet, such as an iPad? | | | |
| | 1 | Computer/laptop | 75% | |
| | 2 | Smart Phone | 12% | |
| | 3 | Tablet | 8% | |
| | 4 | Don't go online | 4% | |
| | 98 | Not sure | 1% | |
| | 99 | Refused | 0% | |
| Q23 | In the past year, have you visited one or more of the websites maintained by the City of Lake Forest? | | | |
| | 1 | Yes | 61% | Ask Q24 |
| | 2 | No | 39% | Skip to Q25 |
| | 99 | Refused | 1% | Skip to Q25 |
| Q24 | Are you satisfied or dissatisfied with the resources and content available on the City's web sites? <i>Get answer, then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i> | | | |
| | 1 | Very satisfied | 52% | |
| | 2 | Somewhat satisfied | 39% | |
| | 3 | Somewhat dissatisfied | 4% | |
| | 4 | Very dissatisfied | 3% | |
| | 98 | Not sure | 2% | |
| | 99 | Refused | 0% | |
| Q25 | In the past year, have you visited City of Lake Forest's Facebook page? | | | |
| | 1 | Yes | 7% | |
| | 2 | No | 92% | |
| | 99 | Refused | 1% | |

| Q26 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 | E-mail | 47% | 31% | 21% | 2% |
| B | Electronic Newsletters | 39% | 38% | 21% | 2% |
| C | Twitter | 5% | 19% | 72% | 5% |
| D | Facebook | 18% | 32% | 48% | 3% |
| E | A Smart Phone application that would allow you to communicate with the City, report issues, and receive updates | 38% | 24% | 35% | 3% |
| F | City website | 50% | 35% | 13% | 2% |
| G | Newsletters and other materials mailed directly to your house | 62% | 25% | 11% | 2% |
| H | Automated phone calls | 22% | 25% | 51% | 2% |
| I | Town hall and community meetings | 22% | 47% | 28% | 3% |
| J | Advertisements in local papers | 20% | 35% | 43% | 1% |
| K | Public Access Television | 19% | 29% | 49% | 2% |

| Section 10: Informed Top Issue | |
|---|--|
| Q27 Now that we've had the opportunity to discuss a variety of topics and services in Lake Forest, is there a particular issue that you would most like the city government to focus on during the next two years? <i>If yes, ask: Please briefly describe it to me. Verbatim responses recorded and later grouped into categories shown below.</i> | |
| | No issues / Everything is fine 40% |
| | Traffic congestion 10% |
| | Public safety 10% |
| | Parks, recreation 9% |
| | Cleanliness, beautification 7% |
| | Growth, development 4% |
| | Infrastructure maintenance 4% |
| | Not sure / Cannot think of anything 4% |
| | Spending, budgeting 3% |
| | Local economy 3% |
| | Environmental issues 3% |
| | Parking 2% |
| | Illegal immigration 2% |

| | |
|------------------------------|----|
| Public transportation | 2% |
| Education, schools | 2% |
| Community-focused activities | 1% |
| Taxes, fees | 1% |
| Recycling | 1% |
| Programs for youth | 1% |
| Programs for seniors | 1% |
| Communication, outreach | 1% |

Section 11: 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 | 57% |
| | 2 | Employed part-time | 11% |
| | 3 | Student | 6% |
| | 4 | Homemaker | 3% |
| | 5 | Retired | 18% |
| | 6 | In-between jobs | 5% |
| | 98 | Not sure | 0% |
| | 99 | Refused | 1% |
| D2 | Do you currently have any children under the age of 18 living in your home? | | |
| | 1 | Yes | 39% |
| | 2 | No | 60% |
| | 99 | Refused | 1% |
| D3 | Some residents live in Homeowners Associations and some do not. Do you live in a Homeowners Association? | | |
| | 1 | Yes | 74% |
| | 2 | No | 24% |
| | 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 | 14% |
| | 3 | \$60,000 to \$79,999 | 10% |
| | 4 | \$80,000 to \$99,999 | 13% |
| | 5 | \$100,000 or more | 40% |
| | 98 | Not sure | 2% |
| | 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 | 28% |
| | 2 | Republican | 45% |
| | 3 | Other | 4% |
| | 4 | DTS | 24% |
| S2 | Age | | |
| | 1 | 18 to 29 | 15% |
| | 2 | 30 to 39 | 15% |
| | 3 | 40 to 49 | 21% |
| | 4 | 50 to 64 | 32% |
| | 5 | 65 or older | 17% |
| | 99 | Not coded | 0% |

| | | | |
|-----------|-------------------------------|---------------------------|-----|
| S3 | Registration Year | | |
| | 1 | 2012 to 2009 | 27% |
| | 2 | 2008 to 2005 | 28% |
| | 3 | 2004 to 2001 | 17% |
| | 4 | Before 2001 | 29% |
| S4 | Household Party Type | | |
| | 1 | Single Dem | 13% |
| | 2 | Dual Dem | 7% |
| | 3 | Single Rep | 17% |
| | 4 | Dual Rep | 18% |
| | 5 | Single Other | 14% |
| | 6 | Dual Other | 4% |
| | 7 | Dem & Rep | 7% |
| | 8 | Dem & Other | 6% |
| | 9 | Rep & Other | 11% |
| | 0 | Mixed (Dem + Rep + Other) | 2% |
| S5 | Likely to Vote by Mail | | |
| | 1 | Yes | 38% |
| | 0 | No | 62% |
| S6 | Home Owner | | |
| | 1 | Yes | 70% |
| | 2 | No | 30% |
| S7 | Area of City | | |
| | 1 | One | 24% |
| | 2 | Two | 22% |
| | 3 | Three | 31% |
| | 4 | Four | 23% |

BUSINESS SURVEY



City of Lake Forest
Business Survey
Final Toplines
November 2012

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 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 <<insert 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 | 25% |
| | 2 | 5 years to less than 10 years | 23% |
| | 3 | 10 years to less than 15 years | 13% |
| | 4 | 15 or more years | 37% |
| | 99 | Refused | 1% |
| Q2 | 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 | 27% |
| | 2 | Good | 55% |
| | 3 | Fair | 7% |
| | 4 | Poor | 2% |
| | 5 | Very poor | 1% |
| | 98 | Not sure | 7% |
| | 99 | Refused | 1% |

| | | |
|----|--|-----|
| Q3 | If the city government could do one thing to improve the business climate in Lake Forest, what would you like to see? Verbatim responses recorded and later grouped into categories shown below. | |
| | Not sure / Cannot think of any | 24% |
| | No changes / Everything is okay | 23% |
| | Increase biz, networking opportunities | 15% |
| | Reduce signage restrictions | 14% |
| | Reduce taxes, fees | 6% |
| | Improve, add parking | 5% |
| | Improve safety, security of biz areas | 3% |
| | More business-friendly government | 3% |
| | Repair, maintain roads | 2% |
| | Reduce environmental restrictions | 2% |
| | Reduce rent, lease fees | 1% |
| 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 / No particular aspect | 34% |
| | Access to other local businesses, services | 21% |
| | Good location / Convenient access for customers | 18% |
| | Access to roads, freeways, surrounding communities | 13% |
| | Sense of community / Family-oriented City | 12% |
| | Business-friendly City / Special biz events, programs | 8% |
| | No business license / Ease of startup | 5% |
| | Public safety / Low crime rate | 5% |
| | Cleanliness, beauty of City | 4% |
| Q5 | Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services? (get answer, then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)? | |
| | 1 Very satisfied | 57% |
| | 2 Somewhat satisfied | 35% |
| | 3 Somewhat dissatisfied | 3% |
| | 4 Very dissatisfied | 3% |
| | 98 Don't Know | 2% |
| | 99 Refused | 0% |

| Section 3: Specific Services | | | | | | | |
|------------------------------|---|---|--------------------|-----------------------|-------------------|------------|---------|
| Q6 | | <p>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.</p> <p>Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?</p> | | | | | |
| <i>Randomize</i> | | Extremely Important | Very Important | Somewhat Important | Not too Important | No Opinion | Refused |
| A | Providing business watch programs | 9% | 35% | 33% | 17% | 7% | 0% |
| B | Investigating criminal activity | 26% | 61% | 10% | 2% | 1% | 0% |
| C | Enforcing traffic laws | 15% | 46% | 27% | 12% | 0% | 0% |
| D | Maintaining a low crime rate | 40% | 56% | 3% | 0% | 0% | 0% |
| E | Providing building permit services | 10% | 36% | 30% | 17% | 6% | 0% |
| F | Providing building inspection services | 6% | 36% | 38% | 18% | 2% | 0% |
| G | Promoting economic development | 25% | 52% | 14% | 8% | 1% | 0% |
| H | Revitalizing out-dated areas in the City | 18% | 48% | 23% | 10% | 1% | 0% |
| I | Providing business education events | 8% | 27% | 40% | 24% | 0% | 0% |
| J | Providing business networking events | 11% | 31% | 37% | 20% | 1% | 0% |
| K | Providing free business consulting services | 6% | 28% | 36% | 28% | 2% | 0% |
| Q7 | | <p>For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service.</p> <p>Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</p> | | | | | |
| <i>Randomize</i> | | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Very Dissatisfied | No Opinion | Refused |
| A | Provide business watch programs | 33% | 40% | 4% | 2% | 20% | 1% |
| B | Investigate criminal activity | 50% | 33% | 3% | 2% | 12% | 0% |
| C | Enforce traffic laws | 51% | 35% | 4% | 2% | 7% | 0% |
| D | Maintain a low crime rate | 61% | 30% | 3% | 0% | 6% | 0% |
| E | Provide building permit services | 34% | 40% | 3% | 2% | 21% | 0% |
| F | Provide building inspection services | 34% | 39% | 3% | 1% | 22% | 0% |
| G | Promote economic development | 38% | 43% | 5% | 4% | 9% | 1% |
| H | Revitalize out-dated areas in the City | 44% | 39% | 3% | 2% | 12% | 0% |

| | | | | | | | |
|----|---|---------------------|--------------------|-----------------------|-------------------|------------|---------|
| I | Provide business education events | 29% | 47% | 4% | 2% | 17% | 1% |
| J | Provide business networking events | 30% | 46% | 5% | 3% | 15% | 1% |
| K | Provide free business consulting services | 25% | 46% | 5% | 1% | 22% | 1% |
| Q8 | Now I'm going to ask you about another series of specific services provided by the City. Again, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important? | | | | | | |
| | <i>Randomize</i> | Extremely Important | Very Important | Somewhat Important | Not too Important | No Opinion | Refused |
| A | Enforcing zoning regulations | 8% | 38% | 38% | 15% | 0% | 0% |
| B | Enforcing sign regulations | 8% | 42% | 25% | 24% | 0% | 0% |
| C | Street sweeping | 11% | 50% | 33% | 7% | 0% | 0% |
| D | Reducing traffic congestion | 26% | 54% | 15% | 5% | 0% | 0% |
| E | Maintaining local streets and roads | 19% | 71% | 8% | 2% | 0% | 0% |
| F | Landscaping median strips and other areas of the City | 11% | 52% | 28% | 9% | 0% | 0% |
| Q9 | 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 | 36% | 44% | 3% | 3% | 14% | 0% |
| B | Enforce sign regulations | 40% | 39% | 5% | 5% | 10% | 1% |
| C | Provide street sweeping services | 59% | 34% | 1% | 2% | 4% | 0% |
| D | Reduce traffic congestion | 35% | 49% | 9% | 4% | 2% | 0% |
| E | Maintain local streets and roads | 61% | 35% | 1% | 2% | 2% | 0% |
| F | Landscaping median strips and other areas of the City | 64% | 32% | 0% | 1% | 2% | 1% |

| Section 4: Recycling | | | | | | | |
|--|---|-----------------------|--------------|------------------|-------------|------------------------------|------------------|
| Q10 | The State of California recently passed a law that requires businesses that throw away at least four cubic yards of trash per week to have a recycling program. The law also requires cities to monitor and provide support to businesses for their recycling programs. | | | | | | |
| | Prior to taking this survey, were you aware of this new recycling law? | | | | | | |
| | 1 | Yes | 21% | | | | |
| | 2 | No | 77% | | | | |
| | 98 | Not sure | 2% | | | | |
| | 99 | Refused | 0% | | | | |
| Q11 | As I read the following actions that the City of Lake Forest can take, please tell me if they would be helpful to your business' recycling efforts. | | | | | | |
| | Here is the (first/next) one: _____. Would this be very helpful, somewhat helpful, or not helpful to your business' recycling efforts? | | | | | | |
| | | <i>Randomize</i> | Very helpful | Somewhat helpful | Not helpful | Doesn't Apply to my business | Not Sure/Refused |
| A | Offering businesses reduced trash rates for recycling | | 57% | 22% | 13% | 6% | 1% |
| B | Providing free assistance to show businesses how they can reduce their bills by recycling | | 43% | 29% | 23% | 4% | 0% |
| C | Providing free recycling training for employees and provide follow-up assistance | | 32% | 31% | 28% | 9% | 0% |
| D | Assisting businesses to make sure their trash enclosures are adapted to allow recycling | | 53% | 25% | 17% | 5% | 0% |
| E | Host a seminar on recycling programs and implementation | | 28% | 39% | 27% | 5% | 0% |
| Section 5: City-Business Communication | | | | | | | |
| Q12 | Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)? | | | | | | |
| | 1 | Very satisfied | 47% | | | | |
| | 2 | Somewhat satisfied | 37% | | | | |
| | 3 | Somewhat dissatisfied | 10% | | | | |
| | 4 | Very dissatisfied | 2% | | | | |
| | 98 | Don't Know | 3% | | | | |
| | 99 | Refused | 0% | | | | |

| | | | | | | |
|-----|------------------------|--|------|----------|------------|--------------------|
| Q13 | | What information sources do you use to find out about City of Lake Forest news, information and programming? <i>Don't read list. Record up to first 2 responses.</i> | | | | |
| | | <i>If they say Internet or web, probe to see if a City website and, if yes, which one.</i> | | | | |
| | 1 | Saddleback Valley News (paper) | 5% | | | |
| | 2 | Orange County Register (paper) | 11% | | | |
| | 3 | Los Angeles Times (paper) | 3% | | | |
| | 4 | The Leaflet - City Newsletter | 24% | | | |
| | 5 | Leisure Times - City Newsletter | 3% | | | |
| | 6 | City Newsletter - no mention of Leaflet or Leisure Times | 25% | | | |
| | 7 | E-newsletter - electronic newsletter | 14% | | | |
| | 8 | Redevelopment Newsletter / 'A View from the Arbor' | 2% | | | |
| | 9 | City Council Meetings | 1% | | | |
| | 10 | Radio | 1% | | | |
| | 11 | Television | 1% | | | |
| | 12 | Internet, not a City site | 18% | | | |
| | 13 | City Website (not specific) | 24% | | | |
| | 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 | 4% | | | |
| | 19 | Flyers at City Facilities | 6% | | | |
| | 20 | Friends / Other People | 2% | | | |
| | 21 | Facebook/Twitter or other social media | 2% | | | |
| | 22 | Other source | 6% | | | |
| | 23 | Do Not Receive Information about City | 10% | | | |
| | 98 | Not sure | 2% | | | |
| | 99 | Refused | 0% | | | |
| Q14 | | 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. | | | | |
| | | <i>Randomize</i> | Very | Somewhat | Not at all | Not sure / Refused |
| A | E-mail | | 60% | 27% | 12% | 0% |
| B | Electronic Newsletters | | 51% | 33% | 15% | 0% |

| | | | | | | |
|-----|--|------------------|-----------------|---------------------|----------------|--------------------|
| C | Twitter | 12% | 28% | 57% | 3% | |
| D | Facebook | 19% | 38% | 41% | 1% | |
| E | A Smart Phone application that would allow you to communicate with the City, report issues, and receive updates | 38% | 33% | 26% | 3% | |
| F | City website | 53% | 35% | 12% | 0% | |
| G | A Blog on the City's website | 33% | 38% | 29% | 1% | |
| H | Newsletters and other materials mailed directly to your business | 52% | 36% | 11% | 1% | |
| I | Automated phone calls | 9% | 24% | 65% | 1% | |
| J | Town hall and community meetings | 26% | 44% | 30% | 1% | |
| K | Advertisements in local papers | 23% | 33% | 44% | 0% | |
| L | Public Access Television | 15% | 29% | 55% | 1% | |
| Q15 | Have you ever visited the City's economic development website at www.lakeforestbusiness.com ? | | | | | |
| | 1 | Yes | 35% | | | |
| | 2 | No | 65% | | | |
| | 99 | Refused | 0% | | | |
| Q16 | 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 | | 29% | 30% | 41% | 0% |
| B | Company testimonials | | 18% | 40% | 42% | 0% |
| C | Business and Financial Resources Guides | | 37% | 41% | 22% | 0% |
| D | Business success stories | | 31% | 45% | 25% | 0% |
| E | News stories on grand openings and ribbon-cuttings | | 34% | 46% | 20% | 0% |
| F | Shop and Dine directory of local businesses | | 44% | 35% | 21% | 0% |
| G | Commercial property for lease or sale | | 26% | 38% | 36% | 0% |
| H | Information on business seminars and workshops | | 35% | 41% | 24% | 0% |

| | | | | | | |
|-----|---|-----------------------------|---------------------------------|---------------------|----------------|--------------------|
| Q17 | 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 | 35% | | | |
| | 2 | No | 65% | | | |
| | 99 | Refused | 1% | | | |
| Q18 | 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% | 34% | 13% | 0% |
| B | Profiles of local companies | | 39% | 43% | 18% | 0% |
| C | Market information | | 52% | 33% | 16% | 0% |
| D | Interviews with CEO's | | 29% | 40% | 31% | 0% |
| E | Business tips from local businesses | | 38% | 42% | 20% | 0% |
| Q19 | Is there a particular business topic that I didn't mention that you'd like to be addressed in the City's newsletter? <i>If yes, ask: Please briefly describe it to me.</i> | | | | | |
| | | Verbatim responses recorded | Data for 24 respondents on file | | | |
| | 2 | No additional topics | 83% | | | |
| | 98 | Not sure | 5% | | | |
| | 99 | Refused | 0% | | | |
| Q20 | 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 | | 22% | 27% | 51% | 0% |
| B | Understanding business finance | | 32% | 25% | 43% | 0% |
| C | Business job fair and expo | | 30% | 31% | 38% | 0% |
| D | Payroll and tax reporting requirements | | 25% | 30% | 45% | 0% |
| E | Business marketing and sales | | 37% | 35% | 28% | 0% |
| F | Business legal issues | | 33% | 38% | 29% | 0% |
| G | Business networking events | | 38% | 34% | 28% | 0% |
| H | Roundtable discussion on specific topics | | 21% | 43% | 36% | 0% |

| Section 6: Informed Top Issue | | |
|-------------------------------|---|-----|
| Q21 | Now that we've had the opportunity to discuss a variety of topics and services in Lake Forest, is there a particular issue that you would most like the city government to focus on during the next two years? <i>If yes, ask: Please briefly describe it to me. Verbatim responses recorded and later grouped into categories shown below.</i> | |
| | None / Cannot think of any | 57% |
| | Improving marketing, networking, advertising opportunities | 13% |
| | Increasing economic growth, development | 8% |
| | Reducing traffic congestion | 6% |
| | Reducing taxes, fees | 5% |
| | Reducing signage restrictions / Improving biz visibility | 3% |
| | Keeping crime rate low | 3% |
| | Reducing spending / Keeping balanced budget | 2% |

| Section 7: Background & Demographics | | |
|--|---|-----|
| Thank you so much for your participation. I have just a few background questions for statistical purposes. | | |
| D1 | How many people are currently employed at your worksite in Lake Forest? | |
| | 1 | 14% |
| | 2 to 5 | 35% |
| | 6 to 10 | 17% |
| | More than 10 | 32% |
| | Refused | 2% |
| D2 | Approximately how many of these employees live outside of Lake Forest? | |
| | None | 15% |
| | 1 | 16% |
| | 2 to 5 | 29% |
| | 6 to 10 | 15% |
| | More than 10 | 21% |
| | Refused | 5% |

| | | | |
|----|---|--|----------------|
| 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 | 9% |
| | 2 | Quality of business parks | 5% |
| | 3 | Proximity to freeways/transportation corridors | 19% |
| | 4 | Quality of housing stock | 1% |
| | 5 | Overall quality of the City | 8% |
| | 6 | Local amenities (dining/shopping) | 3% |
| | 7 | Close to clients/customers | 9% |
| | 8 | Close to owner's home | 25% |
| | 9 | Other factor (unique responses) | 7% |
| | 98 | Not sure / Business already in place | 15% |
| D4 | In the next 12 months, do you think your business will increase, decrease or stay about the same? | | |
| | 1 | Increase | 55% Ask D5 |
| | 2 | Decrease | 5% Skip to D6 |
| | 3 | Stay about the same | 39% Skip to D6 |
| | 98 | Not sure | 1% Skip to D6 |
| | 99 | Refused | 0% Skip to D6 |
| D5 | To accommodate the growth in your business, will you require additional square footage or a larger building? | | |
| | 1 | Yes | 20% |
| | 2 | No | 76% |
| | 98 | Not sure | 4% |
| | 99 | Refused | 0% |

| | | | | |
|---|--|-------------------|--------------------------------|------------|
| D6 | In the next 12 months, do you think your business will relocate? | | | |
| | 1 | Yes | 8% | Ask D7 |
| | 2 | No | 89% | Skip to D9 |
| | 98 | Not sure | 2% | 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 | 51% | Skip to D9 |
| | 2 | Another community | 41% | Ask D8 |
| | 98 | Not sure | 8% | 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:</i> Please describe the reason. | | | |
| | Verbatim responses recorded | | Data for 7 respondents on file | |
| D9 | Last question for you. Are you a resident of Lake Forest? | | | |
| | 1 | Yes | 34% | |
| | 2 | No | 66% | |
| | 99 | Refused | 0% | |
| Thank you for participating! This survey was conducted for the City of Lake Forest. | | | | |

Section 8: Post-Interview & Sample Items

| | | | |
|----|-------------------|----------------|-----|
| S1 | Gender | | |
| | 1 | Male | 58% |
| | 2 | Female | 42% |
| S2 | Business Subgroup | | |
| | 1 | C-FR | 8% |
| | 2 | C-Southwest | 10% |
| | 3 | C-Midcity | 13% |
| | 4 | C-RDA | 12% |
| | 5 | Homeoccs | 15% |
| | 6 | I-AspanLambert | 5% |

| | | | |
|-----------|--------------------------|---------------|-----|
| | 7 | I-Midcity | 10% |
| | 8 | I-FRPH | 5% |
| | 9 | I-RDA | 3% |
| | 10 | Office | 15% |
| | 11 | Other | 5% |
| S3 | Business Category | | |
| | 1 | Commercial | 43% |
| | 2 | Home-operated | 15% |
| | 3 | Industrial | 23% |
| | 4 | Office | 15% |
| | 5 | Other | 5% |