



City of Lake Forest Strategic Business Plan FY 2017-18 through FY 2021-22 June 2018



City of Lake Forest City Council

Mayor Dr. Jim Gardner
Mayor Pro-Tem Leah Basile
Council Member Tom Cagley
Council Member Dwight Robinson
Council Member Scott Voigts



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A Message from the City Manager

On behalf of the Lake Forest City Council and City staff, it is my privilege to present the City of Lake Forest's Strategic Business Plan for Fiscal Years 2017-18 through 2021-22.

Thanks to the City Council's leadership, the plan establishes a clear vision, mission, and values to guide Lake Forest over the next 5 years.

The plan is focused on three clear long range goals:

- A livable city that is well planned, attractive and safe.*
- A city that is engaged, informed and technologically current.*
- A city government that is fiscally sustainable and well-run with committed staff.*

Implementing this Strategic Plan enables the City to build on past efforts and respond effectively to the needs of its citizens well into the future.

Over next 5 years, the community will enjoy a new senior center and community center, as well as new and revitalized parks. Infrastructure will continue to be prioritized, with added investment in keeping up the condition of our streets. Finally, the City will pay off its last remaining bond debt.

I want to thank you for your ongoing trust and support. We are proud to serve you!

Respectfully,

*Debra Rose
City Manager
City of Lake Forest
June 2018*

"Remember the past, challenge the future"

City Map



Executive Summary

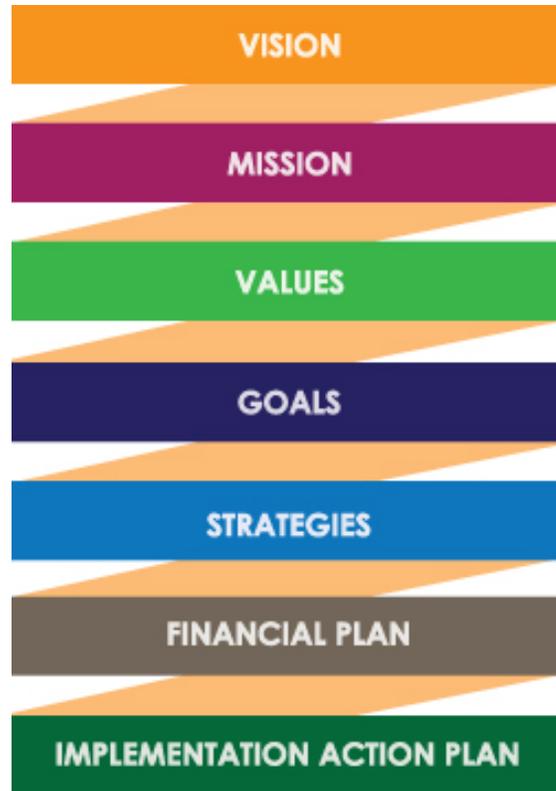


The City of Lake Forest has a long tradition of planning for the community's future. The City Council and staff have developed this new Five-Year Strategic Plan to set forth the direction of the City government's work. City Council members, City Commissioners, and City staff were engaged to develop this plan.

Input to the plan was gathered through interviews with the City Council, a strategic planning questionnaire completed by Commissioners, a gap analysis completed by City department directors, preparation of an environmental scan, a staff workshop, and Council/staff strategic planning workshops.

The result is a plan containing the City's vision, mission, values, goals, revenue and expenditure outlook, and implementation plan. Each of the three broad goals contains three priority areas and a set of programs and projects, which are the means to achieve the goals. Some programs and projects can be implemented without new resources while others will need additional budgetary or staff resources. Implementation of the Strategic Plan will occur through the budget process, work planning within individual City departments and through the City Manager.

In addition to a bi-annual update of the strategic plan, the City Manager will provide an annual report to the City Council and community on progress made on the Strategic Plan during the annual budget preparation process. The City Manager may also provide interim updates on specific projects and strategies as necessary.



A Better Lake Forest Results From . . .



City of Lake Forest Strategic Plan

- Vision, Mission and Values
- Goals and Priority Areas
- Strategies to Achieve Goals
- Council Priorities for FY 2017-18 and 2018-19



Vision, Mission, Values

Vision

Lake Forest will continue to be a safe, attractive and healthy community in which to live, worship, work and play. Our diverse community will foster the active involvement of its citizenry and businesses, and reflect a distinctive, suburban identity that relies upon an established image of lakes, creeks, forests, and open space.

Mission

The City of Lake Forest is committed to ensure an optimal quality of life for its community by providing innovative, effective and efficient services.

Values

- A community where people feel safe and can realize a higher quality of life.
- Diversity, strength, and stability in the Lake Forest economy.
- A circulation system which meets local and regional needs.
- Dialogue with the community on issues and those issues that challenge the future.
- Recreational and cultural opportunities and facilities for the community.
- Continual improvement of services and operations while maintaining a fiscally conservative approach to managing resources.
- Integrity and high ethical standards in what we do and how we do it.
- Unique characteristics, aesthetics and histories of the neighborhoods and communities of Lake Forest.
- Leadership on issues that affect Lake Forest.
- Using creativity, innovation and evolving technology.

Goals and Priority Areas

Goals

Priority Areas



1. **Well planned** – Purposeful direction in land use and transportation planning create a community future generations will value.
2. **Attractive** – Investment and maintenance in public facilities, infrastructure, and natural resources enhances visual character of the City and supports quality neighborhoods.
3. **Safe** – Excellent public safety efforts maintain a family-friendly environment and a high quality of life.



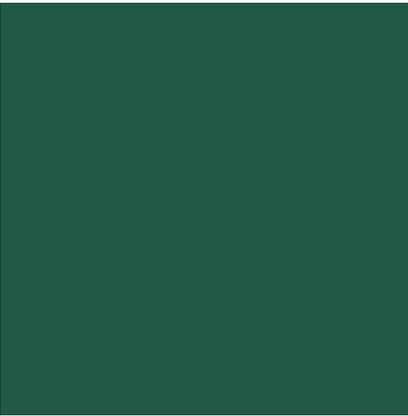
1. **Engaged** – Outreach, creative events, and programs inspire connection and engagement between the community and City government.
2. **Informed** – Transparency about decision-making and government performance cultivates public trust.
3. **Technologically current** – Innovative technologies enhance organizational efficiency and help our community.



1. **Sustainable** – Responsible financial policies and prudent decisions provide short-term fiscal stability and long-term financial health.
2. **Well-run** – Good governance and professional management supports the City’s ability to serve the needs of the community.
3. **With committed people** – Talented staff and contractors are vital assets to our organization and essential to effective and efficient City operations.

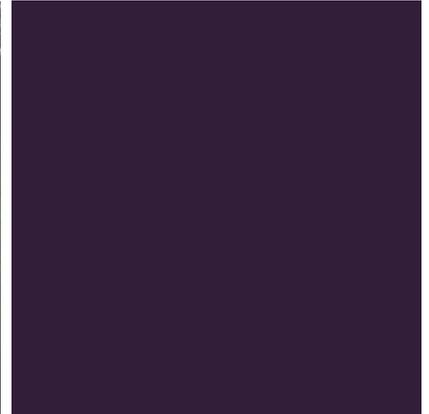


Goal A: Our livable city is well planned, attractive, and safe.



Priority Area	Strategies
<p>1. Well planned: <i>Purposeful direction in land use and transportation planning create a community future generations will value.</i></p>	<ul style="list-style-type: none"> a) Prioritize initiatives to reduce traffic congestion, improve air quality, and manage on-street parking. b) Set the direction in land use for the next 20 years. c) Develop and prioritize an economic development/ business retention and attraction policy addressing population growth, demographic changes, services, and affordable housing. d) Maintain the Municipal Code to best serve the community.
<p>2. Attractive: <i>Investment and maintenance in public facilities, infrastructure, and natural resources enhances visual character of the City and supports quality neighborhoods.</i></p>	<ul style="list-style-type: none"> a) Proactively enhance the visual character of the City and plan for maintenance of all City assets. b) Consistently invest in the City's park system. c) Provide new civic and recreational amenities.
<p>3. Safe: <i>Excellent public safety efforts maintain a family-friendly environment and high quality of life.</i></p>	<ul style="list-style-type: none"> a) Maintain a low crime rate in a cost-effective manner. b) Engage community members in emergency disaster planning and safety. c) Enhance efforts to ensure residents get home safely through increased traffic signage, speed limit enforcement, and other measures. d) Explore a no-kill animal shelter option in Lake Forest.

Goal B: Our connected city is engaged, informed, and technologically current.



Priority Area	Strategies
<p>1. Engaged: <i>Outreach, creative events, and programs inspire connection and engagement between the community and City government.</i></p>	<ul style="list-style-type: none"> a) Maintain a communications and marketing strategy, including two-way communication that enhances community engagement. b) Expand and promote volunteer programs to increase resident engagement through several channels, such as new committees. c) Initiate new community-based programs and services in conjunction with the opening of the new Civic Center.
<p>2. Informed: <i>Transparency about decision-making and government performance cultivates public trust.</i></p>	<ul style="list-style-type: none"> a) Develop programs to expand access to City government. b) Create a dashboard to provide the City Council and community strategic data about the City.
<p>3. Technologically Current: <i>Innovative technologies enhance organizational efficiency and help our community.</i></p>	<ul style="list-style-type: none"> a) Enhance efficiencies and services through technology. b) Evaluate implementing technology to best serve the community.

Goal C: Our healthy city government is sustainable and well-run with committed people.



Priority Area

Strategies

1. **Sustainable:**
Responsible financial policies and prudent decisions provide short-term fiscal stability and long-term financial health.

- a) Operate according to sound fiscal practices.
- b) Operate according to policy on cost recovery.
- c) Identify and evaluate potential cost-saving opportunities.

2. **Well-Run:**
Good governance and professional management support the City’s ability to serve the needs of the community.

- a) Examine ways to continuously improve our effectiveness in procuring and managing contract services.
- b) Review policies and procedures to identify any necessary changes to reflect best practices and increase efficiency and effectiveness in City operations.

3. **Committed People:**
Talented staff and contractors are vital assets to our organization and essential to effective and efficient City operations.

- a) Continue to invest in developing City staff.
- b) Determine optimal staffing level to provide services to residents and the business community.

Council Priorities for FY 2017-18 and 2018 -19



Goal	Priorities
<p>A. Our livable City is well planned, attractive and safe.</p>	<ul style="list-style-type: none"> a) Maintain a “Good” Pavement Condition Index (80 PCI). b) Neighborhood Park Improvement Plan Phase II.
<p>B. Our connected City is engaged, informed and technologically current.</p>	<ul style="list-style-type: none"> a) Implement an Asset Management System/Work Order System. b) Implement a New Electronic Document Management System.
<p>C. Our healthy City government is sustainable and well-run with committed people.</p>	<ul style="list-style-type: none"> a) Hire Additional Staff for the New Senior Center. b) Hire Additional Staff for the New Community and Performing Arts Centers.

Appendix A: Implementation Action Plan

The following pages provide a five-year summary of the revenues and expenditures in the General Fund. Data from the projections for the General Fund show revenues increasing at a similar rate as expenditures in most of the five years of the planning period.

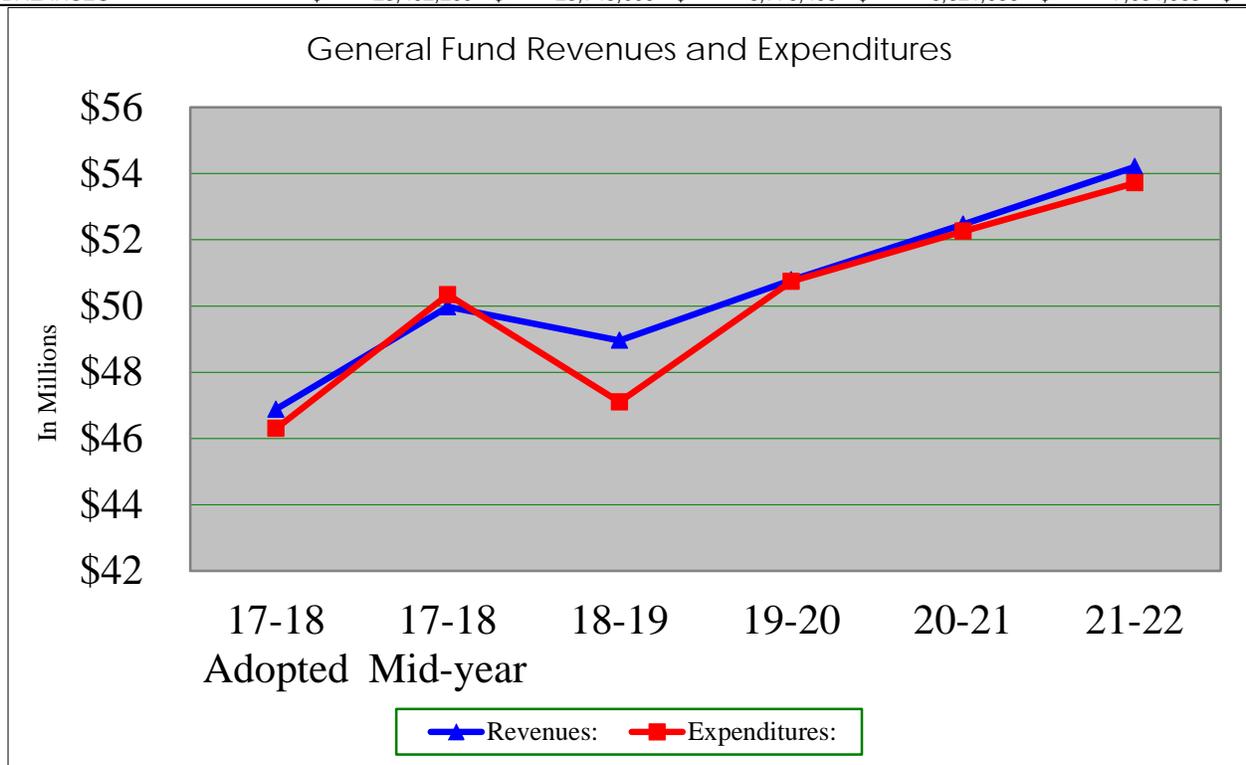
Over the next five years the City will remain vigilant in its monitoring of all revenues and expenditures. The City recognizes the need to remain flexible when reviewing existing and future needs and has prioritized programs and projects to provide the best service possible to the community within existing budgetary constraints. Although the Plan contemplates a five-year time horizon, the City prepares a new Plan every two years. The biennial review allows for the inclusion of better information as well as an opportunity to forecast expenditures and revenues based upon then current data. The Plan development and review process allows the City to be proactive, rather than reactive, and make sound decisions based on quality analysis.

At the end of the five-year planning period covered by this Plan, the General Fund balance is estimated to be approximately \$7.5 million. Additionally, per the City's Reserve Policy, the City continues to ensure that all reserves are fully funded with an estimated \$21.7 million at the end of the five-year period. As a result of the City's fiscally conservative policies, the City is well-positioned to continue to deliver high quality services and projects. As always, the City encourages and welcomes community feedback and participation in continuing to maintain a high quality of life in Lake Forest.

Following the financial projections is the Implementation Matrix listing the programs and projects grouped by funding source. The Program and Project Descriptions at the end of Appendix A provide more detailed descriptions as well as responsible department

GENERAL FUND

	2017-18		2018-19		2019-20		2020-21		2021-2022	
	2017-18	2017-18	2018-19	2018-19	2019-20	2019-20	2020-21	2020-21	2021-2022	2021-2022
BEGINNING BALANCES	\$ 22,737,000	\$ 25,154,500	\$ 23,558,300	\$ 23,558,300	\$ 8,776,400	\$ 8,776,400	\$ 6,821,936	\$ 6,821,936	\$ 7,034,965	\$ 7,034,965
REVENUES:										
Local Taxes	38,752,400	40,116,400	40,947,000	40,947,000	42,664,000	42,664,000	44,296,000	44,296,000	45,985,000	45,985,000
Other Governments	188,200	188,200	267,900	267,900	269,900	269,900	270,900	270,900	271,900	271,900
User Fees and Charges	3,563,800	4,139,200	3,738,900	3,738,900	3,761,800	3,761,800	3,779,800	3,779,800	3,797,800	3,797,800
Licenses and Permits	2,963,900	3,719,100	2,378,000	2,378,000	2,379,000	2,379,000	2,379,000	2,379,000	2,379,000	2,379,000
Fines and Forfeitures	415,000	415,000	437,000	437,000	460,000	460,000	470,000	470,000	480,000	480,000
Use of Money and Property	848,900	848,900	1,036,200	1,036,200	1,089,000	1,089,000	1,111,000	1,111,000	1,133,000	1,133,000
Other Revenue	145,000	545,000	153,000	153,000	162,000	162,000	162,000	162,000	162,000	162,000
TOTAL REVENUES	46,877,200	49,971,800	48,958,000	48,958,000	50,785,700	50,785,700	52,468,700	52,468,700	54,208,700	54,208,700
OPERATING EXPENDITURES:										
City Council	66,300	66,700	66,300	66,300	69,000	69,000	69,700	69,700	70,400	70,400
City Manager	820,800	828,800	1,332,600	1,332,600	1,403,000	1,403,000	1,449,300	1,449,300	1,496,800	1,496,800
City Clerk	787,900	1,158,900	787,500	787,500	818,500	818,500	780,800	780,800	805,600	805,600
Economic Development	1,243,000	1,243,000	457,500	457,500	483,000	483,000	498,800	498,800	515,700	515,700
City Attorney	1,318,000	1,318,000	1,318,000	1,318,000	1,386,000	1,386,000	1,420,900	1,420,900	1,456,600	1,456,600
Finance	3,237,100	5,738,100	3,226,900	3,226,900	3,194,000	3,194,000	3,280,700	3,280,700	3,372,100	3,372,100
Development Services	4,192,600	4,775,400	3,601,000	3,601,000	3,860,200	3,860,200	3,595,600	3,595,600	3,638,400	3,638,400
Public Works	11,288,900	11,698,900	11,679,800	11,679,800	12,195,000	12,195,000	12,462,300	12,462,300	12,752,000	12,752,000
Management Services	1,983,200	1,986,300	2,129,400	2,129,400	2,244,000	2,244,000	2,300,300	2,300,300	2,367,800	2,367,800
Community Services	3,911,500	4,022,400	4,160,100	4,160,100	4,344,000	4,344,000	4,488,500	4,488,500	4,644,500	4,644,500
Police Services	17,448,000	17,502,600	18,220,000	18,220,000	18,967,700	18,967,700	19,725,500	19,725,500	20,511,800	20,511,800
TOTAL OPERATING EXPENDITURES	46,297,300	50,339,100	46,979,100	46,979,100	48,964,400	48,964,400	50,072,400	50,072,400	51,631,700	51,631,700
OPERATING SURPLUS / (DEFECIT)	579,900	(367,300)	1,978,900	1,978,900	1,821,300	1,821,300	2,396,300	2,396,300	2,577,000	2,577,000
Capital Improvement Projects	0	0	120,600	120,600	1,775,764	1,775,764	2,183,271	2,183,271	2,085,664	2,085,664
TOTAL EXPENDITURES	46,297,300	50,339,100	47,099,700	47,099,700	50,740,164	50,740,164	52,255,671	52,255,671	53,717,364	53,717,364
NET SUPRLUS / (DEFECIT)	579,900	(367,300)	1,858,300	1,858,300	45,536	45,536	213,029	213,029	491,336	491,336
Interfund Transfer	85,300	(1,042,200)	(16,640,200)	(16,640,200)	(2,000,000)	(2,000,000)	0	0	0	0
ENDING BALANCES	\$ 23,402,200	\$ 23,745,000	\$ 8,776,400	\$ 8,776,400	\$ 6,821,936	\$ 6,821,936	\$ 7,034,965	\$ 7,034,965	\$ 7,526,301	\$ 7,526,301



Lake Forest Strategic Plan FY 2017-2018 through FY 2021-2022: Implementation Matrix

	Priority Area	Strategies	#	Project/Program Name	Project/Program Description	Schedule					Total
						2017-18	2018-19	2019-20	2020-21	2021-22	Cost
						General Fund Projects and Programs					
Goals A. Our livable City is well planned, attractive, and safe. B. Our connected City is engaged, informed, and technologically current. C. Our healthy City government is sustainable and well-run with committed people.	Well Planned: Purposeful direction in land use and transportation planning create the type of community future generations will value.	Develop and prioritize economic development/business retention and attraction policy addressing population growth, demographic changes, services, and affordable housing.	1	A Study to Determine the Feasibility of Community Choice Aggregation	Prepare a feasibility study to determine if a Community Choice Aggregation Program could reduce energy rates for Lake Forest businesses and residents.		\$60,000				\$60,000
			2	Business Marketing Program	Create and implement a proactive marketing program to convey Lake Forest's beneficial location for desired businesses.		\$28,000	\$8,000	\$8,000	\$8,000	\$52,000
	Attractive: Investment and maintenance in public facilities, infrastructure, and natural resources enhances visual character of the City and supports quality neighborhoods.	Proactively enhance the visual character of the City and plan for maintenance of all City assets.	3	Portola Park Maintenance	This project will maintain Portola Park once it opens to the public.			\$46,500	\$93,000	\$93,000	\$232,500
			4	Design and Construct Whispering Hills Park	Design, construct, and maintain Whispering Hills Park based upon public input.		\$50,000	\$2,000,000	\$40,000	\$40,000	\$2,130,000
	Safe: Excellent public safety efforts maintain a family-friendly environment and high quality of life.	Maintain a low crime rate in a cost effective manner. Engage community in emergency disaster planning and safety. Explore a no-kill animal shelter option in Lake Forest.	5	Orange County Sheriff's Department Staffing	Additional staffing for Police Services through OCSD to increase the number of officers in coordination with City growth.			\$750,000	\$787,500	\$826,900	\$2,364,400
			6	Community Emergency Response Teams (CERT)	Develop and implement a CERT program for interested community members.		\$5,500	\$5,500	\$3,000	\$3,000	\$17,000
			7	A Study to Evaluate Opportunities for a Local Animal Care Program	This study would require the use of an animal care consultant to evaluate potential opportunities for the City to operate its own no-kill animal care program.		\$30,000				\$30,000
	Engaged: Outreach, creative events and programs inspire connection and engagement between the community and City government.	Initiate new community-based programs and services in conjunction with the opening of the new Civic Center.	8	Partnership with Boys and Girls Club	Staff will work with the Boys and Girls Club of Laguna Beach to locate a facility in El Toro Park. The Boys and Girls Club indicated that it would pay for costs associated with this effort.						\$0



	Priority Area	Strategies	#	Project/Program Name	Project/Program Description	Schedule					Total Cost
						2017-18	2018-19	2019-20	2020-21	2021-22	
						General Fund Projects and Programs					
<p>Goals</p> <p>A. Our livable City is well planned, attractive, and safe.</p> <p>B. Our connected City is engaged, informed, and technologically current.</p> <p>C. Our healthy City government is sustainable and well-run with committed people.</p>	Engaged: Outreach, creative events and programs inspire connection and engagement between the community and City government.	Maintain a communications and marketing strategy, including two-way communication that reaches maximum community members.	9	City Project Marketing - News Videos	Develop and implement marketing campaigns to promote and inform the community about important City projects, including roadway improvement projects to assist residents in getting home safely and efficiently.	\$7,000			\$3,000		\$10,000
		Expand and promote volunteer programs to increase resident engagement through several channels, such as new committees.	10	Senior Resident Volunteer Program	Develop programs to increase volunteer resident opportunities.			\$10,000	\$10,000	\$10,000	\$30,000
	Informed: Transparency about decision-making and government performance cultivate public trust.	Develop programs to expand access to City government.	11	Agenda Management System	Expand residents access to City Council meetings through improved streaming and broadcasting of meetings.	\$50,000					\$50,000
		Create a dashboard to inform the City Council and community on strategic data about the City.	12	Lake Forest Dashboard	Develop a dashboard to illustrate key performance indicators, project status and other strategic data.		\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
	Technologically current: Innovative technologies enhance organizational efficiency and help our community.	Enhance efficiencies and service provisions through technology.	13	Electronic Document Management System	Purchase of a new EDMS system will allow greater access to records by making the records more readily available to users online.					\$100,000	\$100,000
	Sustainable: Responsible financial policies and prudent decisions provide short-term fiscal stability and long-term financial health.	Operate according to policy on cost recovery.	14	Fee Recovery Policy and Study	Create a policy on fee recovery for City services and Conduct Fee Study for all City services in compliance with the Cost Recovery Policy.		\$100,000				\$100,000
			15	Financial Management System	Purchase a new financial management program to allow greater financial functionality.				\$270,000		\$270,000
	Committed People: Talented staff and contractors are vital assets to our organization and essential to effective and efficient City operations.	Continue to invest in developing City staff.	16	City Council Internship	Operate a City Council Internship Program for students residing and/or attending schools in and outside of the City						\$0



	Priority Area	Strategies	#	Project/Program Name	Project/Program Description	Schedule					Total Cost
						2017-18	2018-19	2019-20	2020-21	2021-22	
						General Fund Projects and Programs					
Goals A. Our livable City is well planned, attractive, and safe. B. Our connected City is engaged, informed, and technologically current. C. Our healthy City government is sustainable and well-run with committed people.	Committed People: Talented staff and contractors are vital assets to our organization and essential to effective and efficient City operations.	Continue to invest in developing City staff.	17	Youth in Government Day	Youth in Government Day offers local high school students the opportunity to spend one day learning about municipal government.						\$0
			18	Senior Center Staffing	The new Civic Center will include a dedicated Senior Center. Programming and hours at the Senior Center will be expanded to meet increased needs.			\$302,500	\$302,500	\$302,500	\$907,500
		Determine optimal staffing level to provide services to the resident and business community.	19	Community and Performing Arts Center Staffing	The new Civic Center will include a Community Center and Performing Arts Venue. Programming and hours at these locations will be expanded to meet increased needs.			\$492,300	\$492,300	\$492,300	\$1,476,900
			20	Public Works Staffing	Staff anticipates the need for an additional full-time Landscape Inspector to coincide with the growth associated with the opening of the new Civic Center.			\$135,400	\$100,400	\$100,400	\$336,200
				Multiple Fund Projects							
	Attractive: Investment and maintenance in public facilities, infrastructure and natural resources enhances visual character of the City and supports quality neighborhoods.	Proactively enhance the visual character of the City and plan for maintenance of all City Assets.	21	Maintain a "Good" Pavement Condition Index (80 PCI)	This program provides asphalt overlays on arterial roadways and slurry seals on collector and residential streets as determined by the Pavement Management System to maintain an 80 PCI.	\$2,275,000	\$4,375,000	\$4,644,000	\$4,644,000	\$4,644,000	\$20,582,000 - Measure M2 Funds, Gas Tax, and General Fund
			22	Neighborhood Park Improvement Plan Phase II	This project will construct specific renovations at 10 community parks, including a parking lot at Regency Park if requested through a public outreach process.	\$518,000		\$3,500,000	\$3,500,000		\$7,518,000 - 93% General Fund; 7% CIP Fund
			23	Environmental Tier 1 Improvements- Phases 7 through 11	Install catch basin Best Management Practices ("BMP") citywide to prevent pollutants from entering the storm drain and affecting downstream water bodies.	\$133,500	\$133,500	\$133,500	\$133,500	\$133,500	\$667,500 - 85% CIP and 15% Measure M2



Goals	Priority Area	Strategies	#	Project/Program Name	Project/Program Description	Schedule					Total
						2017-18	2018-19	2019-20	2020-21	2021-22	Cost
						Multiple Fund Projects					
A. Our livable City is well planned, attractive, and safe. B. Our connected City is engaged, informed, and technologically current. C. Our healthy City government is sustainable and well-run with committed people.	Technologically current: Innovative technologies enhance organizational efficiency and help our community.	Enhance efficiencies and service provisions through technology.	24	Implementation of an Asset Management System/Work Order System	The Asset Management System allows the City to proactively plan for maintenance of City assets.		\$180,000	\$55,000	\$55,000	\$55,000	\$345,000 50% Facilities Replacement Fund and 50% General Fund
	Sustainable: Responsible financial policies and prudent decisions provide short-term fiscal stability and long-term financial health.	Operate according to sound fiscal practices.	25	Alton Parkway Improvement Project Certificate of Participation Debt Retirement	Pay off the remaining debt service on the Alton Parkway Bond issue at the earliest date provided within the bond documents, December 1, 2018.		\$7,193,700				\$7,193,700 57% FCPP Fund and 43% General Fund
	Gas Tax Fund Projects										
	Well Planned: Purposeful direction in land use and transportation planning create the type of community future generations will value.	Prioritize initiatives to reduce traffic congestion, improve air quality, and manage on street parking.	26	Trabuco Road Ascension Cemetery left turn holding pocket	This project will place a left turn holding lane at the entrance/exit to Ascension Cemetery allowing drivers exiting the cemetery to make left turns in two steps and eliminating the need to wait for all lanes in both directions to clear at one time.			\$10,000	\$90,000		\$100,000
	Lake Forest Transportation Mitigation (LFTM) Fund Projects										
	Well Planned: Purposeful direction in land use and transportation planning create the type of community future generations will value.	Prioritize initiatives to reduce traffic congestion, improve air quality, and manage on street parking.	27	Converting Dedicated Northbound Right Turn at Bake Parkway/ Trabuco/Irvine to a 4th Through/Right Lane ; Addition of 2nd Northbound Left Turn Lane at Bake Parkway/Toledo Way and Bake Parkway/Jeronimo Road	This project will convert the northbound right turn lane on Trabuco to a 4th through/right lane and restripe the southbound #3 through lane on Irvine to a through/ right lane.	\$300,000	\$275,000	\$660,000			\$1,235,000
			28	Widening Bake Parkway for New Dedicated Eastbound Dedicated right turn at Bake Parkway/ Trabuco/Irvine	This project will look into the feasibility of adding a permanent dedicated right turn lane for eastbound Bake Parkway at Trabuco Road by widening Bake Parkway.	\$40,000	\$355,000	\$580,000			\$975,000



	Priority Area	Strategies	#	Project/Program Name	Project/Program Description	Schedule					Total
						2017-18	2018-19	2019-20	2020-21	2021-22	Cost
						Lake Forest Transportation Mitigation (LFTM) Fund Projects					
<p>Goals</p> <p>A. Our livable City is well planned, attractive, and safe.</p> <p>B. Our connected City is engaged, informed, and technologically current.</p> <p>C. Our healthy City government is sustainable and well-run with committed people.</p>	<p>Well Planned: Purposeful direction in land use and transportation planning create the type of community future generations will value.</p>	<p>Prioritize initiatives to reduce traffic congestion, improve air quality, and manage on street parking.</p>	29	Widening of Southbound Jeronimo at Lake Forest Drive for Bike Lane/Defacto Right Turn Lane	This project will widen southbound Jeronimo at Lake Forest by approximately three feet to create an eight feet wide bike lane/defacto southbound right turn lane.				\$25,000	\$142,000	\$167,000
			30	Dedicated Right Turn Lane on Eastbound Ridge Route Drive at Rockfield Blvd	This project removes on-street parking in a parking-impacted location on the south side of Ridge Route Drive, west of Rockfield Boulevard to increase the eastbound curb lane width from 12 feet to 20 feet.			\$2,500			\$2,500
			31	Restriping Northbound Rockfield Blvd at Lake Forest Drive for Additional Through/Turn Lanes and Split Phase Signaling for Rockfield	This project re-stripes the northbound Rockfield Boulevard approach for two and one half northbound left-turn lanes and one and one half northbound through lanes. Re-striping requires a modification of the traffic signal for split phased operation on the southbound and northbound Rockfield Boulevard approaches.			\$11,000	\$63,000		\$74,000
			32	Addition of a Second Eastbound Left Turn Lane on Bake Parkway at Jeronimo	The project will add a second eastbound left turn lane from Bake Parkway to northbound Jeronimo.			\$235,000	\$939,000		\$1,174,000
			33	Southbound Rancho Parkway Widening at Lake Forest Drive for Dedicated Right Turn Lane	This project will widen southbound Rancho Parkway to create an eight foot wide bike lane/defacto right turn.			\$60,000	\$24,000	\$224,000	\$308,000
			34	Addition of a Second Eastbound Left Turn Lane and 2nd Westbound Right Turn Lane on El Toro at Portola/Santa Margarita	This project will add a second eastbound left turn lane on El Toro and a second dedicated right turn lane on westbound El Toro.		\$400,000	\$750,000	\$1,410,700		\$2,560,700



	Priority Area	Strategies	#	Project/Program Name	Project/Program Description	Schedule					Total	
						2017-18	2018-19	2019-20	2020-21	2021-22	Cost	
						Lake Forest Transportation Mitigation (LFTM) Fund Projects						
Goals A. Our livable City is well planned, attractive, and safe. B. Our connected City is engaged, informed, and technologically current. C. Our healthy City government is sustainable and well-run with committed people.	Well Planned: Purposeful direction in land use and transportation planning create the type of community future generations will value.	Prioritize initiatives to reduce traffic congestion, improve air quality, and manage on street parking.	35	Widening of Westbound Los Alisos to Add a Dedicated Right Turn Lane at Rockfield Blvd	This project will widen westbound Los Alisos at Rockfield to add a dedicated westbound right turn lane.			\$127,000	\$225,000	\$495,000	\$847,000	
	City Facilities Replacement Fund Programs											
	Attractive: Investment and maintenance in public facilities, infrastructure, and natural resources enhances visual character of the City and supports quality neighborhoods.	Proactively enhance the visual character of the City and plan for maintenance of all City assets.	36	City Asset Inventory	The City will hire a consultant to inventory all City-owned assets.		\$100,000					\$100,000
	Capital Improvement Projects (CIP) Fund Projects											
	Attractive: Investment and maintenance in public facilities, infrastructure and natural resources enhances visual character of the City and supports quality neighborhoods.	Proactively enhance the visual character of the City and plan for maintenance of all City Assets.	37	Packer Place Storm Drain Improvements	This project designs and constructs a new drainage system near Packer Place.			\$4,000	\$36,000			\$40,000
	Park Development Fund Projects											
Attractive: Investment and maintenance in public facilities, infrastructure and natural resources enhances visual character of the City and supports quality neighborhoods.	Proactively enhance the visual character of the City and plan for maintenance of all City Assets.	38	Construct Portola Park	Construct the park site that includes a flat area for a future parking lot and two flat areas separated by a transition slope. The lower pad is the proposed location of a dog park and has an area of 0.88 acres. The upper pad is the proposed location of the parking lot, restrooms, open turf area, pickle ball and volleyball courts and tot lot. The turf area on the upper pad is approximately one acre.		\$4,200,000					\$4,200,000	



Goals			#	Project/Program Name	Project/Program Description	Schedule					Total
						2017-18	2018-19	2019-20	2020-21	2021-22	Cost
						Foothill Circulation Phasing Plan Projects Fund					
<p>A. Our livable City is well planned, attractive, and safe.</p> <p>B. Our connected City is engaged, informed, and technologically current.</p> <p>C. Our healthy City government is sustainable and well-run with committed people.</p>	<p>Well Planned: Purposeful direction in land use and transportation planning create the type of community future generations will value.</p>	<p>Prioritize initiatives to reduce traffic congestion, improve air quality, and manage on street parking.</p>	39	Addition of a Second Left Turn Lanes in All Directions at the Intersection of Los Alisos and Muirlands	This Foothill Corridor project consists of widening, median modifications and restriping to provide a second left turn lane for each of the four approach legs.			\$450,000	\$1,450,000	\$1,525,000	\$3,425,000
			40	Restriping and Construction of Raised Median Improvements on El Toro Road from Jeronimo to Toledo	This Foothill Corridor project consists of widening the eastbound and westbound lanes on Jeronimo to correct an existing misalignment of the through lanes.			\$100,000	\$700,000		\$800,000
			41	Restriping and Construction of Raised Median Improvements on El Toro Road from Toledo to Trabuco	This Foothill Corridor project consists of replacing the existing painted medians along El Toro Road from Toledo to Trabuco with raised medians.				\$100,000	\$800,000	\$900,000



Program and Project Descriptions



The previous table provides a high level overview of the programs and projects and illustrates the goals and priority areas supported by each. The following portion of the Implementation Action Plan details each program and project identified in the Implementation Matrix herein. This section provides a more detailed description of each of the programs and projects as well as the responsible department.



PROGRAM TITLE: A Study to Determine the Feasibility of Community Choice Aggregation

DEPARTMENT: City Manager’s Office Economic Development Division

PROGRAM DESCRIPTION:

A feasibility study is meant to assess whether Community Choice Aggregation (“CCA”) could reduce energy rates for Lake Forest residents and businesses. The Feasibility Study also will outline the program’s potential viability and risk factors to the City. The Feasibility Study is the initial step in the potential formation of a CCA which is, in and of itself, an extensive multiyear effort that includes a comprehensive Business Plan in coordination with numerous regulations under the purview of the California Public Utilities Commission.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$60,000
2019-20	\$0
2020-21	\$0
2021-22	\$0
TOTALS	\$60,000

SOURCE OF FUNDING: General Fund – 100%

PROGRAM TITLE: Business Marketing Program

DEPARTMENT: City Manager's Office Economic Development Division

PROGRAM DESCRIPTION:

Create and implement a proactive marketing program to convey Lake Forest's beneficial location for desired businesses.

During the upcoming five-year strategic planning period, staff will continue to actively market Lake Forest as a destination for businesses through its existing Business Retention and Attraction Program. To supplement these efforts, staff would retain a consulting firm that provides direct marketing services to businesses. The selected consulting firm will use consumer demographics, trade area maps, household segmentations, employment profiles, and consumer demand and market supply assessments to identify potential retailers and restaurants looking to expand operations into the City. In addition to working with City staff, the consultant also will work with property owners, site selectors, and real estate professionals to enhance the efforts to fill commercial vacancies. As part of these efforts, staff also may work with the consultant to assist with developing an economic development action plan, assess current retail performance, and evaluate retail potential, including feasibility studies and revenue projections. The anticipated cost of the consultant's services is approximately \$28,000 per year for the first year, which includes funds for two economic market analyses.

COST DETAIL:

<u>FISCAL YEAR</u>	<u>COST</u>
2017-18	\$0
2018-19	\$28,000
2019-20	\$8,000
2020-21	\$8,000
2021-22	\$8,000
<u>TOTALS</u>	<u>\$52,000</u>

SOURCE OF FUNDING: General Fund – 100%

PROJECT TITLE: Portola Park Maintenance

DEPARTMENT: Public Works

CATEGORY: Parks and Recreation

PROGRAM DESCRIPTION:

On November 5, 2013, the City Council approved the development of Portola Center, located at the intersection of Saddleback Ranch Road and Glenn Ranch Road. As part of the Development Agreement (“DA”), the developer is to provide the City with 5-acres of land to be developed into a public park. Based on resident input, this park will include playgrounds, picnic areas, a dog park, and sports fields. Staff anticipates that the park will be open in year three of this five-year period and that maintenance of this park will be approximately \$93,000 per year. As staff anticipates that the park will open mid Fiscal Year 2018-19, year three includes one half of the anticipated maintenance costs.

COST DETAIL:

<u>FISCAL YEAR</u>	<u>COST</u>
2017-18	\$0
2018-19	\$0
2019-20	\$46,500
2020-21	\$93,000
2021-22	\$93,000
TOTALS	\$232,500

SOURCE OF FUNDING: General Fund – 100%

PROGRAM TITLE: Design and Construct Whispering Hills Park

DEPARTMENT: Community Services

PROGRAM DESCRIPTION:

The proposed Whispering Hills Park site is approximately 6.5 acres with approximately 5 acres that can be developed as a City Park, due to the natural slopes of the site. In 2015, a consultant conducted community park planning meetings to solicit design ideas from residents. At that time, the community did not reach a consensus on the park design. In 2017, a different consultant conducted one community meeting to determine if residents are still interested in developing a park on the site. The prevailing community sentiment was to construct a passive type of park that will minimize noise, late night activity, and traffic impacts to the surrounding area. The City will hire a consultant to re-initiate the park planning process, which includes up to three public park planning meetings to solicit input from residents. The Conceptual Plan will be shared with the Parks and Recreation Commission and City Council prior to bidding the construction of the park. Additionally, the cost estimates below include ongoing maintenance of the park.

COST DETAIL:

<u>FISCAL YEAR</u>	<u>COST</u>
2017-18	\$0
2018-19	\$50,000
2019-20	\$2,000,000
2020-21	\$40,000
2021-22	\$40,000
<u>TOTALS</u>	<u>\$2,130,000</u>

SOURCE OF FUNDING: General Fund – 100%

PROGRAM TITLE: Orange County Sheriff's Department Staffing

DEPARTMENT: Management Services

PROGRAM DESCRIPTION:

As the City's population grows, Orange County Sheriff's Department ("OCSD") staff will need to be increased to meet the community's service needs. Based on preliminary research, staff believes that the City will require two additional patrol deputies once the Civic Center opens. The following cost detail includes the fully-burdened salary costs, equipment costs, and potential vehicle expenses associated with additional OCSD deputies.

COST DETAIL:

<u>FISCAL YEAR</u>	<u>COST</u>
2017-18	\$0
2018-19	\$0
2019-20	\$750,000
2020-21	\$787,500
2021-22	\$826,900
<u>TOTALS</u>	<u>\$2,364,400</u>

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Community Emergency Response Team (CERT) Program

DEPARTMENT: Management Services

PROGRAM DESCRIPTION:

The Community Emergency Response Team (“CERT”) program educates volunteers relative to disaster preparedness and trains them in basic disaster response skills such as fire safety, light search and rescue, team organization, and disaster medical operations. CERT offers a consistent, nationwide approach to volunteer training and organization that professional responders can rely on during disaster situations, which allows them to focus on more complex tasks. Through CERT, the capabilities to prepare for, respond to, and recover from disasters is built and enhanced. Individuals who complete the CERT program may utilize the skills learned to remain engaged with the City through continued participation as a CERT Volunteer. For instance, in the event of an emergency, CERT Volunteers may assist first responders in types of disasters that the City may face (i.e., fires and earthquakes). Ongoing training every two years for CERT graduates is required to remain an active volunteer with the City.

The City provided a Citizens Emergency Preparedness Academy (“CEPA”) in the past to residents once a year. The CERT program would replace CEPA, and it is anticipated that there will be additional costs to run the CERT program, due to the added classes and supplies. Staff anticipates costs will be higher the first few years of the program and will decrease after all supplies for the program have been acquired. While developing the program, staff will investigate the option to implement a regional CERT program with neighboring cities as well. Staff also will customize the program to best meet the needs of the City.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$5,500
2019-20	\$5,500
2020-21	\$3,000
2021-22	\$3,000
TOTALS	\$17,000

SOURCE OF FUNDING: General Fund – 100%

Program No. 6.

PROGRAM TITLE: A Study to Evaluate Opportunities for a Local Animal Care Program

DEPARTMENT: City Manager's Office

PROGRAM DESCRIPTION:

The City Council requested that staff investigate the potential of creating and operating a local no-kill animal care program. To adequately study this option, the City would retain a consultant specializing in the animal care field to thoroughly assess all City-operated animal care program possibilities. Through this program, staff will draft a scope of work for a program evaluation and will select a qualified consultant to perform the technical work required to assess the opportunities for a local animal care program. The study also will assess the program's potential viability and risk factors to the City as well as potential ongoing and capital costs associated with all local options. Cost estimates related to this kind of program evaluation vary.

This is the initial step in the potential formation of a local animal control program which is, in and of itself, an extensive multiyear effort that will include comprehensive planning and oversight. All of the steps discussed herein will all require further policy direction from the City Council. Given these factors, staff initially outlined the potential cost of the program evaluation herein described. Potential additional steps in this process are anticipated in future years. However, it is not yet possible to assume costs without further direction from the City Council.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$30,000
2019-20	\$0
2020-21	\$0
2021-22	\$0
TOTALS	\$30,000

SOURCE OF FUNDING: General Fund – 100%

Program No. 7.

PROGRAM TITLE: Partnership with the Boys and Girls Club

DEPARTMENT: Community Services

PROGRAM DESCRIPTION:

Staff will work with the Boys and Girls Club of Laguna Beach explore opportunities to locate a facility in the City, potentially in El Toro Park. City staff will facilitate community meetings to solicit public input. The Boys and Girls Club indicated that it would pay for expenses associated with this effort.

COST DETAIL:

<u>FISCAL YEAR</u>	<u>COST</u>
2017-18	\$0
2018-19	\$0
2019-20	\$0
2020-21	\$0
2021-22	\$0
<u>TOTALS</u>	<u>\$0</u>

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: City Project Marketing – News Videos

DEPARTMENT: Management Services

PROGRAM DESCRIPTION:

The Public Information Office staff will begin to regularly produce 90-second “news” videos highlighting City projects, programs, and events. These videos may feature upcoming and/or ongoing roadway improvement projects in order to assist residents in getting home safely and efficiently. Staff will broadcast these videos through the City’s digital platforms and send these to multiple news media outlets (including television stations) as video news releases. The Public Information Office also proposes the use of a staff committee comprised of representatives from all departments to create and manage a City-Wide Social Media Calendar in an effort to maximize opportunities for social media posts. Lastly, staff will utilize additional communication features associated with the launch of the City’s new mobile application. The following estimates include costs associated with procuring and replacing production equipment including green screens, cameras, and microphones to produce high-quality, effective news videos.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$7,000
2018-19	\$0
2019-20	\$0
2020-21	\$3,000
2021-22	\$0
TOTALS	\$10,000

SOURCE OF FUNDING: 100 % General Fund

PROGRAM TITLE: Senior Resident Volunteer Program

DEPARTMENT: Community Services

PROGRAM DESCRIPTION:

The new Civic Center will include a dedicated Senior Center. Once the center is operational, City staff will develop a structured volunteer program to provide seniors with meaningful volunteer opportunities in the community. Staffing at the new Senior Center will be augmented to enhance efforts to recruit, screen, and manage volunteers. The following estimates outline the costs associated with increased hours for a part-time program specialist to formalize the program.

COST DETAIL:

<u>FISCAL YEAR</u>	<u>COST</u>
2017-18	\$0
2018-19	\$0
2019-20	\$10,000
2020-21	\$10,000
2021-22	\$10,000
<u>TOTALS</u>	<u>\$30,000</u>

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Agenda Management System

DEPARTMENT: City Clerk

PROGRAM DESCRIPTION:

The City's agenda management system, Sire, is obsolete as the manufacturer is no longer supporting development of service pack upgrades or bug fixes. As the program is contingent upon the Microsoft Office platform, the City is prohibited from advancing its installation of more advanced Office products, due to the Sire Office "backbone". Replacing the Agenda Management System will provide for the most current technological processes in the production of the agenda and allow for higher definition video streaming using better equipment. The expenses outlined below detail the costs associated with implementing a new agenda management system.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$50,000
2018-19	\$0
2019-20	\$0
2020-21	\$0
2021-22	\$0
TOTALS	\$50,000

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Lake Forest Dashboard

DEPARTMENT: City Manager's Office

PROGRAM DESCRIPTION:

Pursuant to City Council direction, Staff will develop a dashboard with key performance indicators, project status, and other strategic data as one-year pilot program. Staff will develop several dashboards to demonstrate the range of data analysis staff could perform and assess the City Council's desires as it relates to measuring programs and projects. The pilot program requires the City to purchase a limited number of software licenses at a cost of \$9.99 per license per year. The City Manager's Office and the Information Technology division will work together to acquire the appropriate number of licenses and develop a working group to begin developing dashboards responsive to the City Council's wishes. Staff anticipates that the one-year pilot program will have an associated expense of \$1,200.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$1,200
2019-20	\$1,200
2020-21	\$1,200
2021-22	\$1,200
TOTALS	\$4,800

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Electronic Document Management System

DEPARTMENT: City Clerk

PROGRAM DESCRIPTION:

The proposed system is an electronic document management system for the archival storage and public retrieval of official City records to replace the current Documentum system. Purchase of a new EDMS system will allow greater access to records by making the records more readily available to users online, 24/7. The estimated costs include migration of existing City files to the new system.

COST DETAIL:

<u>FISCAL YEAR</u>	<u>COST</u>
2017-18	\$0
2018-19	\$0
2019-20	\$0
2020-21	\$0
2021-22	\$100,000
<u>TOTALS</u>	<u>\$100,000</u>

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Fee Recovery Policy and Study

Program No. 13.

DEPARTMENT: Finance

PROGRAM DESCRIPTION:

The City charges fees to residents and businesses for a wide variety of services including plan check, inspection, recreation classes, facility rental, and youth programs. Periodically, the City assesses the actual costs of performing the tasks associated with user fees through a Fee Study. The City utilizes a consultant to conduct the Fee Study to analyze the actual costs relative to fee generating services performed.

The consultant would complete this program in two phases. Phase one of this program involves setting a City-wide Fee Recovery Policy. Prior to conducting a review and update of all fees, industry best practices suggest the City Council should adopt a policy of cost recovery to determine the City's desired percent of cost recovery for all services provided.

Following policy development, the consultant will begin the Fee Study utilizing the newly created policy, phase two of the program. After completion of the cost analysis, the recovery rate from the City Council adopted policy will be applied. This program will result in a comprehensive fee schedule to be presented to the City Council for approval. The following table outlines the costs associated with retaining consultants to assist the City in this effort.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$100,000
2019-20	\$0
2020-21	\$0
2021-22	\$0
TOTALS	\$100,000

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Financial Management System

DEPARTMENT: Finance

PROGRAM DESCRIPTION:

The complexity and volume of accounting requirements associated with an increase level of service delivery currently exceeds the existing financial system's capabilities. The existing financial management system has been in place since incorporation in 1991 and is lacking in terms of capability and functionality.

Acquisition and implementation of a new financial management system that utilizes current technology will promote greater efficiencies within the City through the automation of manual processes and integration of redundant data. Staff will have the ability to query financial data more efficiently and to provide more detailed reporting for auditing and financial analyses. In addition, the acquisition of a capital projects module will allow for ease and accuracy in long-term project tracking and maintenance of financial records of capital assets.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$0
2019-20	\$0
2020-21	\$270,000
2021-22	\$0
TOTALS	\$270,000

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: City Council Internship

DEPARTMENT: City Council

PROGRAM DESCRIPTION:

Staff will implement a volunteer City Council Internship Program open to students 18 and older residing and/or attending schools in and outside of the City. The Program will be six week long and activities may include attending City Council Meetings, Commission Meetings, and site tours. Staff anticipates using funds included in the City Council budget year-to-year for any program expenditures.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$0
2019-20	\$0
2020-21	\$0
2021-22	\$0
TOTALS	\$0

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Youth in Government Day

DEPARTMENT: City Council

PROGRAM DESCRIPTION:

Youth in Government Day offers local high school students the opportunity to spend one day learning about municipal government. Attendees meet members of the City Council and City Executive Team and learn about conducting City business. Participants would also have the opportunity to learn about potential careers, including qualifications and training. Staff anticipates using funds included in the City Council budget year-to-year for any program expenditures.

COST DETAIL:

<u>FISCAL YEAR</u>	<u>COST</u>
2017-18	\$0
2018-19	\$0
2019-20	\$0
2020-21	\$0
2021-22	\$0
TOTALS	\$0

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Senior Center Staffing

DEPARTMENT: Community Services

PROGRAM DESCRIPTION:

The new Civic Center will include a dedicated Senior Center. Programming and hours at the Senior Center may be expanded to meet increased needs. Expanding program hours to Monday through Friday 9 a.m.to 4 p.m. will add 14 hours of programming per week which is consistent with operational hours of other local senior centers. In addition to developing support groups for seniors suffering from chronic diseases (Alzheimer’s, Parkinson’s Disease, and/or cancer), other new program offerings will include expansion of the current Emeritus Program classes to comprise the following:

- Dance
- Health
- Creative writing
- Art
- Photography
- Genealogy
- Nutrition
- Healthy cooking
- Box gardening
- Citizenship classes

The proposed increase in service hours and the corresponding increase in programming will necessitate additional part-time (“PT”) staff and the conversion of a full-time Recreation Supervisor, as detailed in the cost allocation below. The additional staff will assist with day-to-day activities in addition to program registration, the sale of transportation vouchers, and various programs and special events. New positions would include the following.

- PT Recreation Coordinator
- PT Recreation Specialist
- Additional Recreation Leaders
- Conversion of the current Recreation Supervisor to a Senior Recreation Supervisor

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$0
2019-20	\$302,500
2020-21	\$302,500
2021-22	\$302,500
TOTALS	\$907,500

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Community Center and Performing Arts Staffing

DEPARTMENT: Community Services

PROGRAM DESCRIPTION:

The new Civic Center will include a dedicated Community Center and Performing Arts Venue. The Community Center will be open four weekdays from 8 a.m. to 10 p.m. and weekends from 10 a.m. to 6 p.m., with the option for room rentals with extended hours until 12 midnight on weekends. The Community Center will be available for the following private rental events.

- Weddings
- Banquets
- Baby showers
- Birthday parties
- Business meetings

The Performing Arts Venue will accommodate City Council and Commission meetings on Tuesdays and Thursdays from 4 p.m. to 10 p.m. with the option for theatre productions with local schools or theatre companies on Saturdays and Sundays with varied hours until 10 p.m. The staffing for the Community Center will also oversee the Performing Arts Center and will include the following positions.

- 1 Senior Recreation Supervisor
- 1 Recreation Supervisor
- 2 Part-Time Coordinators
- 6 Recreation Specialists
- 6 Recreation Leaders
- 1 contracted part-time Sound Technician for Performing Arts Center

The following cost detail outlines expenses associated with the staffing proposed to meeting the programing hours of the Community and Performing Arts Centers.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$0
2019-20	\$492,300
2020-21	\$492,300
2021-22	\$492,300
TOTALS	\$1,476,900

SOURCE OF FUNDING: 100% General Fund

PROGRAM TITLE: Public Works Staffing

DEPARTMENT: Public Works

PROGRAM DESCRIPTION:

As the City grows, the maintenance staff will need to be increased to meet the community's new service needs. Staff will need to evaluate its current and required staffing levels as these relate to the maintenance division as the City prepares to open its 100-year home. While staff will present detailed operational plans for each facility with options for varying service levels, the following cost details include the cost to recruit and retain one additional full-time Landscape Inspector. The first year expense also includes the cost of a vehicle for the new position

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$0
2019-20	\$135,400
2020-21	\$100,400
2021-22	\$100,400
TOTALS	\$336,200

SOURCE OF FUNDING: 100% General Fund

PROJECT TITLE: Maintain a “Good” Pavement Condition (80 PCI)

DEPARTMENT: Public Works

CATEGORY: Streets

PROJECT DESCRIPTION:

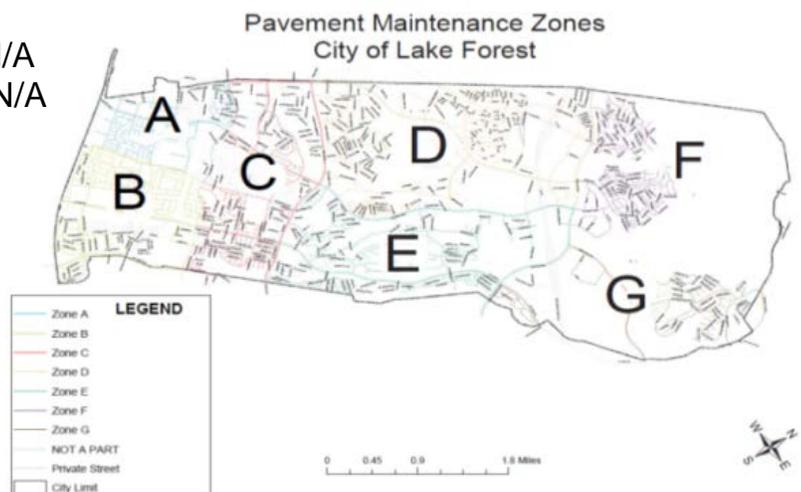
This project provides asphalt overlays on arterial roadways and slurry seals on collector and residential streets, as determined by the Pavement Management Program. The program is designed to avoid expensive deferred maintenance. Conformance with the program makes the City eligible for Measure M2 funding.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18	\$75,000	\$2,200,000		\$2,275,000
2018-19*	\$75,000	\$1,650,000	\$2,650,000	\$4,375,000
2019-20	\$344,000	\$4,300,000		\$4,644,000
2020-21	\$344,000	\$4,300,000		\$4,644,000
2021-22	\$344,000	\$4,300,000		\$4,644,000
Total	\$1,182,000	\$16,750,000	\$2,650,000	\$20,582,000

SOURCE OF FUNDING		ALLOCATION
Measure M2 Fairshare		36%
Gas Tax - Road Maintenance Rehab Account		44%
Gas Tax (FY17-18; FY18-19 Only)		2%
General Fund - To maintain a PCI rating of 80		18%

*Midcycle CIP budget adjustment is needed for funding in FY18-19 to maintain a Pavement Condition Index (“PCI”) of 80.

OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A



PROGRAM TITLE: Neighborhood Park Improvement Plan
Phase II

DEPARTMENT: Community Services

PROGRAM DESCRIPTION:

The City will work with a park designer to plan renovations and improvements for 10 City parks. In 2017, a consultant solicited input from residents regarding their ideas for park renovations for 10 City parks through a series of community meetings and an online survey. The City hired a new consultant to complete the community consultation and develop conceptual plans for each park to share with the Parks and Recreation Commission and City Council. The Consultant also will develop Final Plans and construction documents for each park. The 10 City parks include:

- Borrego Overlook Park
- Cherry Park
- Darrin Park
- Montbury Park
- Peachwood Park
- Pebble Creek Park
- Rancho Serrano Park
- Regency Park
- Sundowner Park
- Vintage Park

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18	\$518,000			\$518,000
2018-19				\$0
2019-20		\$3,500,000		\$3,500,000
2020-21		\$3,500,000		\$3,500,000
2021-22				\$0
Total	\$518,000	\$7,000,000	\$0	\$7,518,000

SOURCE OF FUNDING		ALLOCATION
Park Improvement Fund (Design)		100%

OPERATING BUDGET IMPACT
ANNUAL OPERATING COSTS: N/A

PROJECT TITLE: Environmental Tier 1 Improvements – Phases 7 through 11

DEPARTMENT: Public Works

CATEGORY: Environmental

PROJECT DESCRIPTION

Install catch basin Best Management Practices ("BMP") citywide. The BMP units will prevent trash, debris, and particles carrying pollutants generated and transported at street level from entering the storm drain system that affects downstream water bodies. This program is a multiphase project for catch basin retrofits under the OCTA grant program for the Environmental Tier 1 Improvements Program. This project addresses requirements mandated by a pending statewide trash policy under development by the State Water Resources Control Board. There are 1,006 catch basins citywide. To-date the City has installed 666 debris screens.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18		\$133,500		\$133,500
2018-19*		\$133,500		\$133,500
2019-20		\$133,500		\$133,500
2020-21		\$133,500		\$133,500
2021-22		\$133,500		\$133,500
Total	\$0	\$667,500	\$0	\$667,500

SOURCE OF FUNDING		ALLOCATION
Measure M2 CTFP Comp. Grant Funds (City CIP) Prog. Ending FY18-19		75%
Capital Improvement Projects Fund		25%

OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A



PROGRAM TITLE: Implementation of an Asset Management/Work Order Software and Implementation Services

DEPARTMENT: Public Works

PROGRAM DESCRIPTION:

This software system would allow the City to track the costs and type of work performed by contractors against City assets or groups of assets such as an individual park. The data collected by the software system, including asset conditions and maintenance histories, would be integrated with the City's existing GIS platform and used to calculate future capital replacement needs. The project costs include software licensing fees and one-time software implementation services which include workflow analyses, creation of a detailed asset registry, and training for City staff and contractors.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$180,000
2019-20	\$55,000
2020-21	\$55,000
2021-22	\$55,000
TOTALS	\$345,000

SOURCE OF FUNDING: 50% City Facilities Replacement Fund and 50% General Fund

PROGRAM TITLE: Alton Parkway Improvement Project Certificate of Participation Debt Retirement

DEPARTMENT: Finance

PROGRAM DESCRIPTION:

The Rancho Cañada Financing Authority issued Certificates of Participation for the Alton Parkway Improvement Project. The Foothill Circulation Phasing Plan (“FCPP”), a fee program associated with building permits established by the County of Orange in the 1980s, is the primary source to service the debt.

The earliest date the debt may be called and paid off is December 1, 2018. The amount required to retire the outstanding Certificates of Participation on that date is \$7.2 million, inclusive of a \$65,000 call premium. Approximately \$4.1 million of the total would be contributed by FCPP funds and \$3.1 million would be contributed by the General Fund. Early retirement of this debt would save the City approximately \$1 million in interest costs.

COST DETAIL:

FISCAL YEAR	COST
2017-18	\$0
2018-19	\$7,193,700
2019-20	\$0
2020-21	\$0
2021-22	\$0
TOTALS	\$7,193,700

SOURCE OF FUNDING: 57% FCPP Fund and 43% General Fund

PROJECT TITLE: Trabuco Road Ascension Cemetery Left Turn Holding Pocket

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements

PROJECT DESCRIPTION:

The entrance/exit to Ascension Cemetery is located on Trabuco Road north of Lake Forest Drive. This T-intersection is located in an area with some horizontal and vertical curvature and where there are three lanes of traffic in each direction and a 55 mph speed limit. A left turn holding lane (similar to the one just south of this intersection for the horse stable property) would allow drivers exiting the cemetery to make left turns in two steps, eliminating the need to wait for all lanes in both directions to clear at one time.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20	\$10,00			\$10,000
2020-21		\$90,000		\$90,000
2021-22				\$0
Total	\$10,00	\$90,000	\$0	\$100,000

SOURCE OF FUNDING		ALLOCATION
Gas Tax		100%

OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A



PROJECT TITLE: Converting Dedicated Northbound Right Turn at Bake Parkway/Trabuco/Irvine to a 4th Through/Right Lane; Addition of 2nd Northbound Left Turn Lane at Bake Parkway/Toledo Way and Bake Parkway/Jeronimo Road

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements - Lake Forest Traffic Mitigation (“LFTM”)

PROJECT DESCRIPTION:

This LFTM project will convert the northbound right turn lane on Trabuco to a 4th through/right lane and restripe the southbound #3 through lane on Irvine to a through/ right lane. Prior to initiating design, a review will be completed to determine if the specific improvements noted above are appropriate or if other substitute improvements should be considered. This project also will review two additional intersections on Bake Parkway to determine if any additional improvements should be considered beyond those that are currently identified in the LFTM. Specifically, the Council directed staff to review the potential benefits and costs of a second northbound left turn lane on Jeronimo Road at Bake Parkway and a second northbound left turn lane on Toledo Way at Bake Parkway. The following expense estimates associated with this project include design, construction, and potential right-of-way acquisition costs.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18	\$300,000			\$300,000
2018-19			\$275,000	\$275,000
2019-20		\$660,000		\$660,000
2020-21				\$0
2021-22				\$0
Total	\$300,000	\$660,000	\$275,000	\$1,235,000

SOURCE OF FUNDING	
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Lake Forest Transportation Mitigation (LFTM)
 OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A

ALLOCATION
 100%



PROJECT TITLE: Widening Bake Parkway for New Dedicated Eastbound Dedicated Right Turn at Bake Parkway/Trabuco/Irvine

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements

PROJECT DESCRIPTION:

This project will look into the feasibility of adding a permanent dedicated right turn lane for eastbound Bake Parkway at Trabuco Road by widening Bake Parkway. A preliminary design study would occur in FY17-18 to determine feasibility and right-of-way needs/impacts. The City temporarily reconfigured Bake Parkway in FY17-18 to provide a striped dedicated right turn lane as an interim measure, since the permanent design/right-of-way/construction process may take several years to complete. The funds budgeted for FY2018-19 would include final design and right-of-way document preparation/acquisition, should Council decide to proceed with the permanent project after the preliminary design study is completed. Construction of the permanent dedicated right turn lane would occur as part of a future CIP program. The following expense estimates associated with this project include design, construction, and potential right-of-way acquisition costs.

CAPITAL COST DETAIL

FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18	\$40,000			\$40,000
2018-19	\$80,000		\$275,000	\$355,000
2019-20		\$580,000		\$580,000
2020-21				\$0
2021-22				\$0
Total	\$120,000	\$580,000	\$275,000	\$975,000

SOURCE OF FUNDING

Capital Improvement Projects Fund or LFTM ALLOCATION
100%

OPERATING BUDGET IMPACT
ANNUAL OPERATING COSTS: N/A
FISCAL YEAR COSTS BEGINS: N/A



PROJECT TITLE: Widening of Southbound Jeronimo at Lake Forest Drive for Bike Lane/Defacto Right Turn Lane

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements - Lake Forest Traffic Mitigation (“LFTM”)

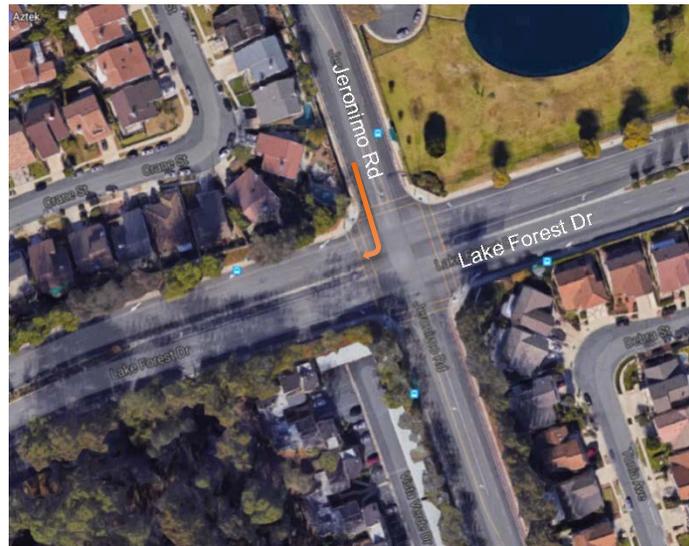
PROJECT DESCRIPTION:

This LFTM project will widen southbound Jeronimo at Lake Forest by approximately three feet to create an eight feet wide bike lane/defacto southbound right turn lane.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20				\$0
2020-21	\$25,000			\$25,000
2021-22		\$134,500	\$7,500	\$142,000
Total	\$25,000	\$134,500	\$7,500	\$167,000

SOURCE OF FUNDING		ALLOCATION
Lake Forest Transportation Mitigation		100%

OPERATING BUDGET IMPACT
ANNUAL OPERATING COSTS: N/A
FISCAL YEAR COSTS BEGINS: N/A



PROJECT TITLE: Dedicated Right Turn Lane on Eastbound Ridge Route Drive at Rockfield Blvd

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements - Lake Forest Traffic Mitigation (“LFTM”)

PROJECT DESCRIPTION:

This LFTM project removes on-street parking in a parking-impacted location on the south side of Ridge Route Drive, west of Rockfield Boulevard to increase the eastbound curb lane width from 12 feet to 20 feet. The additional width allows eastbound right-turning vehicles to move to the right of the eastbound through vehicles to complete the right turn onto southbound Rockfield Boulevard without having to wait for through traffic to move.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20		\$2,500		\$2,500
2020-21				\$0
2021-22				\$0
Total	\$0	\$2,500	\$0	\$2,500

SOURCE OF FUNDING		ALLOCATION
Lake Forest Transportation Mitigation		100%

OPERATING BUDGET IMPACT
ANNUAL OPERATING COSTS: N/A
FISCAL YEAR COSTS BEGINS: N/A



PROJECT TITLE: Restriping Northbound Rockfield Blvd at Lake Forest Drive for Additional Through/Turn Lanes and Split Phase Signaling for Rockfield

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements - Lake Forest Traffic Mitigation (“LFTM”)

PROJECT DESCRIPTION:

This LFTM project re-stripes the northbound Rockfield Boulevard approach for two and one half northbound left-turn lanes and one and one half northbound through lanes. Re-striping requires a modification of the traffic signal for split phased operation on the southbound and northbound Rockfield Boulevard approaches. This project involves re-striping only with no roadway widening.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20	\$11,000			\$11,000
2020-21		\$63,000		\$63,000
2021-22				\$0
Total	\$11,000	\$63,000	\$0	\$74,000

SOURCE OF FUNDING		ALLOCATION
Lake Forest Transportation Mitigation		100%

OPERATING BUDGET IMPACT
ANNUAL OPERATING COSTS: N/A
FISCAL YEAR COSTS BEGINS: N/A



PROJECT TITLE: Addition of a Second Eastbound Left Turn Lane on Bake Parkway at Jeronimo

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements Lake Forest Traffic Mitigation (“LFTM”)

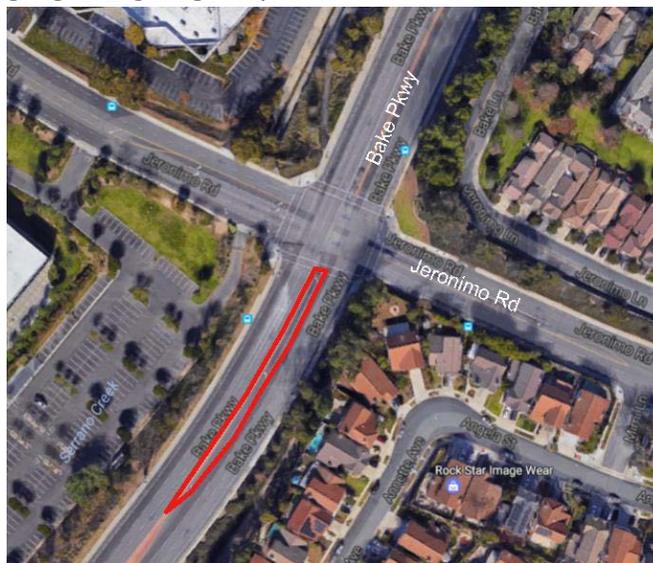
PROJECT DESCRIPTION:

The project will add a second eastbound left turn lane from Bake Parkway to northbound Jeronimo.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20	\$235,000			\$235,000
2020-21		\$831,000	\$108,000	\$939,000
2021-22				\$0
Total	\$235,000	\$831,000	\$108,000	\$1,174,000

SOURCE OF FUNDING		ALLOCATION
Lake Forest Transportation Mitigation		100%

OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A



PROJECT TITLE: Southbound Rancho Parkway Widening at Lake Forest Drive for Dedicated Right Turn Lane

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements Lake Forest Traffic Mitigation (“LFTM”)

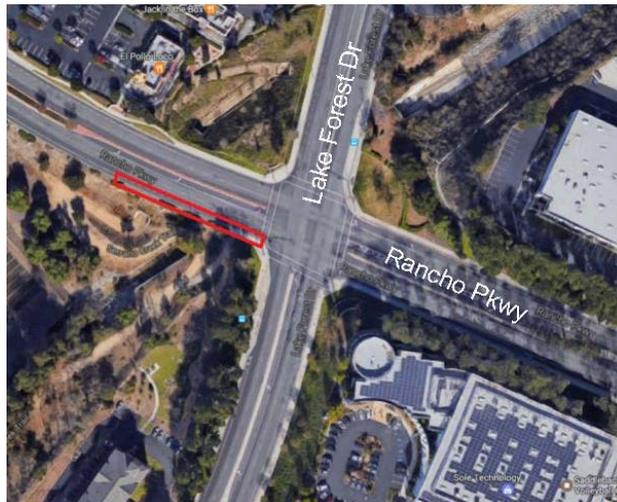
PROJECT DESCRIPTION:

This project will widen southbound Rancho Parkway to create an eight foot wide bike lane/defacto right turn. This LFTM improvement would accommodate the increase in traffic flow resulting from the extension of Rancho Parkway to Portola Parkway.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20	\$60,000			\$60,000
2020-21			\$24,000	\$24,000
2021-22		\$224,000		\$224,000
Total	\$60,000	\$224,000	\$24,000	\$308,000

SOURCE OF FUNDING		ALLOCATION
Lake Forest Transportation Mitigation		100%

OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A



PROJECT TITLE: Addition of a Second Eastbound Left Turn Lane and 2nd Westbound Right Turn Lane on El Toro at Portola/Santa Margarita

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements - Lake Forest Traffic Mitigation (“LFTM”)

PROJECT DESCRIPTION:

This LFTM project will add a second eastbound left turn lane on El Toro and a second dedicated right turn lane on westbound El Toro. This project will require the acquisition of approximately 9,200 square feet of right-of-way from the County along Aliso Creek.

The funding request for FY 17-19 is for design in FY 18-19 and right-of-way document preparation/acquisition and construction to be budgeted in the 2019-21 CIP. Prior to initiating design, a review will be completed to determine if the specific improvements noted above are appropriate or if other substitute improvements should be considered.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19	\$400,000			\$400,000
2019-20			\$750,000	\$750,000
2020-21		\$1,410,700		\$1,410,700
2021-22				\$0
Total	\$400,000	\$1,410,700	\$750,000	\$2,560,700

SOURCE OF FUNDING	
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Lake Forest Transportation Mitigation

ALLOCATION
100%

OPERATING BUDGET IMPACT
ANNUAL OPERATING COSTS: N/A
FISCAL YEAR COSTS BEGINS: N/A



PROJECT TITLE: Widening of Westbound Los Alisos to Add a Dedicated Right Turn Lane at Rockfield Blvd

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements – Lake Forest Traffic Mitigation (“LFTM”)

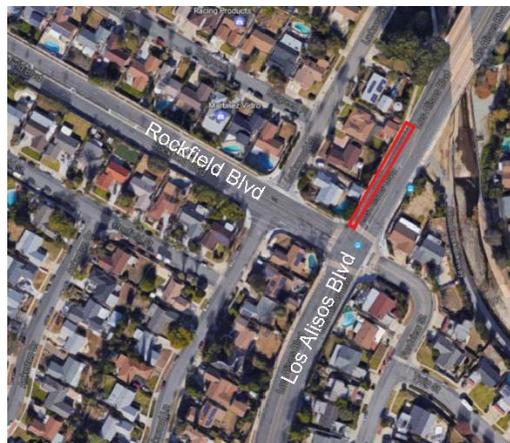
PROJECT DESCRIPTION:

This LFTM project will widen westbound Los Alisos at Rockfield to add a dedicated westbound right turn lane. As currently designed, this project will require acquisition of right-of-way that will impact the backyards of several residential properties.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20	\$127,000			\$127,000
2020-21			\$225,000	\$225,000
2021-22		\$495,000		\$495,000
Total	\$127,000	\$495,000	\$225,000	\$847,000

SOURCE OF FUNDING		ALLOCATION
Lake Forest Transportation Mitigation		100%

OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A



PROGRAM TITLE: City Asset Inventory

DEPARTMENT: Public Works

PROGRAM DESCRIPTION:

With the exception of the roadway data developed through the Pavement Management Program, the City's existing records for other asset types such as storm drains, park amenities, or traffic control devices are incomplete and are lacking critical information including asset condition, age, or specifications. Therefore, the principal program goal is to assess the City's infrastructure needs by developing a citywide asset register and collecting necessary field data to assist in forming an Asset Management Plan. The asset management plan is a long-range planning document that provides a framework for understanding the assets an organization owns, services it provides, risks it assumes, and financial investments it requires. The asset register establishes the data foundation of the asset management plan by consolidating all data pertaining to the assets within the Asset Management/Work Order Software system, another key component to developing an Asset Management Plan.

Consultants experienced in evaluating infrastructure system conditions will prioritize infrastructure needs from highest to lowest probability of failure, identify a timeline for repair and replacement, and estimate associated costs would conduct an analysis. This would enable the City to transition from a reactive to a proactive approach of maintaining the City's infrastructure assets, gain a better understanding of the current state of the infrastructure and its future needs, and develop a consistent and defensible methodology for prioritizing work and budget expenditures.

COST DETAIL:

<u>FISCAL YEAR</u>	<u>COST</u>
2017-18	\$0
2018-19	\$100,000
2019-20	\$0
2020-21	\$0
2021-22	\$0
TOTALS	\$100,000

SOURCE OF FUNDING: 100% City Facilities Replacement Fund

PROJECT TITLE: Packer Place Storm Drain Improvements

DEPARTMENT: Public Works

CATEGORY: Parks and Recreation

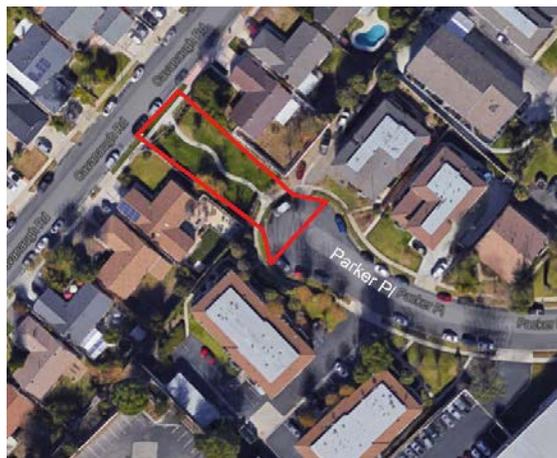
PROJECT DESCRIPTION

This project designs and constructs a new drainage system near Packer Place where a small park exists. The park does not have sufficient drainage flow, causing water to build up in the cul-d-sac. The buildup creates flooding during normal rain events. This project will allow the water to flow properly and remove the standing water.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20	\$4,000			\$4,000
2020-21		\$36,000		\$36,000
2021-22				\$0
Total	\$4,000	\$36,000	\$0	\$40,000

SOURCE OF FUNDING		ALLOCATION
Capital Improvement Projects Fund		100%

OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A



Project Location

PROJECT TITLE: Construct Portola Park

DEPARTMENT: Community Services

CATEGORY: Parks and Recreation

PROJECT DESCRIPTION

The proposed Portola Park site is near the intersection of Saddleback Ranch Road and Glen Ranch Road in the South parcel of the Portola Center Development project. The total park site is six and one third acres, with a net usable area of five acres that includes a flat area for a future parking lot and two flat areas separated by a transition slope. The lower pad is the proposed location of a dog park and has an area of 0.88 of an acre. The upper pad is the proposed location of the parking lot, restrooms, open turf area, pickle ball and volleyball courts and tot lot. The turf area on the upper pad is approximately one acre.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19		\$4,200,000		\$4,200,000
2019-20				
2020-21				
2021-22				
Total	\$0	\$4,200,000	\$0	\$4,200,000

SOURCE OF FUNDING		ALLOCATION
Park Development Fund		100%

OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A



PROJECT TITLE: Addition of a Second Left Turn Lanes in All Directions at the Intersection of Los Alisos and Muirlands

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements - Foothill Circulation Phasing Plan Projects Fund (“FCPP”)

PROJECT DESCRIPTION

This FCPP project consists of widening, median modifications and restriping to provide a second left turn lane for each of the four approach legs. It requires approximately 7,200 square feet of additional right-of-way and widening of the bridge over Aliso Creek. This project is also identified in the LFTM and NITM as a mitigation project. This project would have to be coordinated with the City of Mission Viejo.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20	\$450,000			\$450,000
2020-21			\$1,450,000	\$1,450,000
2021-22		\$1,525,000		\$1,525,000
Total	\$450,000	\$1,525,000	\$1,450,000	\$3,425,000

SOURCE OF FUNDING		ALLOCATION
Foothill Circulation Phasing Plan Projects Fund		100%

OPERATING BUDGET IMPACT
 ANNUAL OPERATING COSTS: N/A
 FISCAL YEAR COSTS BEGINS: N/A

PROJECT TITLE: Restriping and Construction of Raised Median Improvements on El Toro Road from Jeronimo to Toledo

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements - Foothill Circulation Phasing Plan Projects Fund (“FCPP”)

PROJECT DESCRIPTION

This FCPP project consists of widening Jeronimo north and south of El Toro to correct an existing misalignment of the through lanes. A Right of Way acquisition of approximately 4,750 SF and construction of a retaining wall along the northwest corner of Jeronimo would be required to accommodate the widening. Eastbound and westbound El Toro Road would be restriped for an additional left turn lane in each direction. The short median island on the east side of the intersection would be removed and a raised median constructed from the intersection of El Toro and Jeronimo to the intersection of El Toro and Toledo.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20	\$100,000			\$100,000
2020-21		\$700,000		\$700,000
2021-22				\$0
Total	\$100,000	\$700,000	\$0	\$800,000

SOURCE OF FUNDING		ALLOCATION
Foothill Circulation Phasing Plan Projects Fund		100%

OPERATING BUDGET IMPACT

ANNUAL OPERATING COSTS: N/A

FISCAL YEAR COSTS BEGINS: N/A

PROJECT TITLE: Restriping and Construction of Raised Median Improvements
on El Toro Road from Toledo to Trabuco

DEPARTMENT: Public Works

CATEGORY: Traffic Improvements - Foothill Circulation Phasing Plan
Projects Fund ("FCPP")

PROJECT DESCRIPTION

This FCPP project consists of replacing the existing painted medians along El Toro Road from Toledo to Trabuco with raised medians. Staff will evaluate the possibility of utilizing a planted median or a stamped concrete median based upon funding availability at the time of project design.

CAPITAL COST DETAIL				
FISCAL YEAR	DESIGN	CONSTRUCTION	OTHER	TOTAL
2017-18				\$0
2018-19				\$0
2019-20				\$0
2020-21	\$100,000			\$100,000
2021-22		\$800,000		\$800,000
Total	\$100,000	\$800,000	\$0	\$900,000

SOURCE OF FUNDING		ALLOCATION
Foothill Circulation Phasing Plan Projects Fund		100%

OPERATING BUDGET IMPACT

ANNUAL OPERATING COSTS: N/A

FISCAL YEAR COSTS BEGINS: N/A

Appendix B: 2016 Resident and Business Survey



The City conducts a biennial resident and business survey to obtain an understanding of the community's satisfaction, priorities, and concerns as they relate to services and facilities provided by the City of Lake Forest. The 2016 resident survey was conducted from November 29, 2016 to December 14, 2016 while the business survey was conducted from December 5, 2016 to January 12, 2017. This appendix provides a summary of the survey results.

JUST THE FACTS

The following is an outline of the main factual findings from the 2016 study. 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, simply turn to the appropriate report section.

GENERAL PERCEPTIONS OF CITY & LOCAL ISSUES

- The vast majority of respondents shared favorable opinions of the quality of life in Lake Forest, with 39% reporting it is excellent and 52% stating it is good. Seven percent (7%) of residents indicated the quality of life in the City is fair, whereas 2% used poor or very poor to describe quality of life in the City.
- When businesses were asked to rate the business climate in Lake Forest compared with surrounding areas, 33% reported that it is excellent, 46% said it is good, and 17% offered that it is fair. Only 4% of businesses indicated that, when compared with neighboring areas, the business climate in the City of Lake Forest is poor or very poor.
- When asked to indicate one thing city government could change to improve Lake Forest, one-quarter (26%) of residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (14%) or desired no changes from the City (12%). Of the specific suggestions, the most common were reducing traffic congestion (12%), limiting growth and development (11%), cleaning up/improving/rebuilding deteriorating areas of the City (8%), and improving public safety (6%).
- When asked about what the City could do to improve the business climate in Lake Forest, more than half of business managers surveyed were either unsure of a change that could be made (39%) or indicated that no changes were needed (23%). Specific suggestions for improving the business climate included having fewer restrictions/regulations (6%), increasing business networking opportunities (6%), and reducing signage restrictions (4%).
- Nearly half (48%) 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 mentioned, having a convenient, easily-accessible location within the City (16%), not having to navigate/pay for a business license/ease of startup (8%), Lake Forest's sense of community (7%), and access to roads, freeways, and surrounding communities (6%) were mentioned most often.
- Nearly eight-in-ten business managers surveyed (78%) said they could not think of any challenges associated with doing business in Lake Forest. The most common specific challenges cited were too many regulations (4%), undocumented immigrant issues (4%), and traffic/parking issues (3%).

- More than eight-in-ten residents (81%) and local businesses (87%) surveyed said that, over- all, 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 (92% very or some- what satisfied), maintain a low crime rate (89%), and provide child safety programs (88%).
- Among the services provided by the Development Services Department, residents rated inspecting buildings as the most important service provided by the Department (65%), followed by enforcing zoning regulations (60%), issuing building permits (58%), and enforcing sign regulations (48%). Satisfaction ratings assigned to the four development services ranged from a low of 73% for enforcing zoning regulations to a high of 85% for inspecting buildings.
- Of the residents surveyed, just 12% had applied for a building permit, received a building inspection, requested code enforcement, or used any other service offered by the Development Services Department in the 12 months prior to the survey.
- Among the services provided by the Public Works Department, maintaining local streets and roads was viewed as the most important service (94%), followed by providing garbage collection services (90%) and reducing traffic congestion (88%). Residents were most satisfied with the Department's efforts to provide garbage collection services (93%), maintain trees (91%), provide street sweeping services (90%), maintain parks and picnic areas (90%), and maintain public landscapes (89%).
- Among the services provided by the Community Services Department, residents assigned the highest importance to providing recreation programs for special needs children (70%), followed by providing recreation and sports programs for teens (67%), providing special events like concerts in the park and the Fourth of July Parade (62%), and providing recreation and sports programs for elementary school-aged children (59%). Residents expressed the highest levels of satisfaction with the Department's efforts to provide special events like concerts in the park and the Fourth of July Parade (91%), recreation and sports programs for elementary school-aged children (91%), and after school recreation programs (89%).

SPECIFIC SERVICES: BUSINESS SURVEY

- Among 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 (94% extremely or very important), followed by investigating

criminal activity (84%), promoting economic development (72%), and revitalizing outdated areas in the City (65%). At the top of the satisfaction scale was providing building permit services (95%), followed by enforcing traffic laws (94%), maintaining a low crime rate (93%), and investigating criminal activity (93%).

- Among the infrastructure-related services provided by the City to local businesses, members of the business community rated maintaining local streets and roads as most important (83%), followed closely by reducing traffic congestion (77%). The other four services—landscaping median strips and other areas of the City (59%), street sweeping (59%), enforcing zoning regulations (51%), and enforcing sign regulations (48%)— were viewed as somewhat less important. Satisfaction was greatest with respect to the City’s efforts to landscape median strips and other areas of the City (97%), provide street sweeping services (96%), maintain local streets and roads (96%), and enforce zoning regulations (93%).

RECREATION

- Among 10 recreational amenities and facilities presented, residents assigned the highest priority to expanding and improving the network of walking, hiking, and biking trails (81% high or medium priority), and adding and upgrading playground equipment at existing parks (71%). At the other end of the spectrum, residents assigned substantially lower priority ratings to providing pickleball courts (18%), a splash pad (28%), and additional outdoor exercise equipment (44%).

TRAFFIC

- Residents reported that, on average, they encounter bad traffic on Orange County freeways on more than half (59%) of their trips. Trips on major streets in the City were somewhat better, with an average of 43% involving bad congestion, compared with roughly 16% of trips in residential areas of the City.
- Most residents (80%) felt that Lake Forest has either less (39%) or about the same amount (41%) of traffic congestion as neighboring Orange County cities. A minority (17%) of residents surveyed felt that Lake Forest has more congestion than other Orange County cities, whereas 4% were unsure or unwilling to answer the question.
- Two-thirds of residents indicated they were very (24%) or somewhat (43%) satisfied with the City’s efforts to improve circulation by improving roads and intersections, timing traffic signals, and other measures, whereas approximately one-quarter were very (12%) or somewhat (16%) dissatisfied.
- Residents were asked, *If the City could fund only one traffic or transportation-related project, what should it be?* One-third (33%) of respondents were unsure or could not think of a traffic or transportation-related project to fund. Synchronizing traffic signals (19%) and addressing traffic on major streets in the City (11%) were the most common specific suggestions, followed by increasing/improving transit schedules, routes and/or bus frequency (8%) and

addressing traffic congestion in general (8%). An additional 5% of residents surveyed said the City should not fund any transportation projects.

COMMUNICATION

- Overall, 73% of residents indicated that they were either very (35%) or somewhat (39%) satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means.
- Among local businesses, 76% of business managers surveyed indicated that they were satisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means, 12% said they were dissatisfied, whereas 12% were unsure.
- The single most frequently cited source of city information among residents in 2016 was the *Leaflet* (39%), followed by the *Orange County Register* (18%), Internet in general (not the City's site) (15%), Facebook/Social Media (11%), and the City's Newsletter (general mention)(10%).
- Fifty-four percent (54%) of residents surveyed mentioned *at least one* of Lake Forest's news- letters as a source of City information.
- When asked what information sources they use to find out about City news, information, and programming, members of the business community were most likely to mention *The Leaflet* (21%), the City's website in general (19%), and the Internet in general (18%). Other commonly mentioned sources included the City's electronic newsletter (13%), a City News- letter in general (9%), and the *Orange County Register* (8%).
- Overall, 41% of businesses surveyed mentioned *at least one* of Lake Forest's newsletters as a source of City information.
- Lake Forest business managers indicated that email was the most effective method the City can use to communicate with their business (85% very or somewhat effective), followed by the City's website (83%), e-Newsletters (81%), direct mail to their office (80%), and a smart phone application (77%).
- Fifty-seven percent (57%) of residents indicated that they had visited at least one of the City's websites in the 12 months prior to the interview.
- Website visitors expressed high levels of satisfaction with the City's websites, with 80% of residents indicating they were satisfied with the resources available on the sites.
- Among the communication methods tested, email received the highest percentage of residents indicating they would be likely to use the method (86%) when communicating information to the City, followed by the *Ask Lake Forest* website feature (68%), a smart phone application (67%), and telephone (61%).
- By comparison, residents were less likely to state they would use letters sent via traditional mail (41%), tours, workshops or in-person meetings (43%), online town

- hall meetings (49%), and social media (51%) to communicate information to the City of Lake Forest.
- When asked how likely they would be to use various features of a proposed Lake Forest mobile app, a majority of residents expressed interest in each feature tested. The highest rates of anticipated use were provided for emergency notifications pushed to your phone (84% very or somewhat likely to use the feature), public safety news and events (79%), and reporting potholes, graffiti, and other neighborhood concerns to the City (79%).
 - Forty-one percent (41%) 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 a Shop and Dine directory of local businesses (84% very or somewhat interested), followed by information on business seminars and workshops (74%), Business and Financial resource guides (72%), and news stories on grand openings and ribbon-cutting events (71%).
 - Business managers were also asked about their interest in attending a variety of seminars the City is considering. Businesses expressed the greatest interest in attending business networking events (71% very or somewhat interested), social media and marketing seminars (70%), business marketing and sales seminars (69%), and workshops that address legal issues for businesses (68%).

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, approximately one-quarter (23%) indicated that it is close to the owner's home, and an additional 21% mentioned location/accessibility of Lake Forest. Other specific reasons included competitive lease rates/rents (9%), proximity to freeways (8%) and that Lake Forest is close to their clients/customers (5%).
- Local businesses were generally optimistic about their future growth, with 52% anticipating growth and 36% expecting that their business would remain about the same in the coming year. Just 3% indicated that they expect their business to decrease during this period, whereas 6% were unsure.
- Among the 52% of businesses that anticipated growth, 10% indicated that they would require additional space whereas the remaining 42% were either unsure or did not anticipate needing additional space.
- Eight percent (8%) of businesses surveyed anticipated relocating in the next year. Approximately 2% 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 opinions, priorities, and concerns of Lake Forest residents and businesses. Operating from the philosophy that you can't manage what you don't measure, since 1998 Lake Forest has regularly used the survey as a community needs assessment and performance measurement tool. In short, the study presents an opportunity to profile residents' and local businesses' needs and priorities, measure how well the City is performing in meeting these needs through existing services and facilities, and gather data on a variety of quality-of-life, issue, and policy-related matters. 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.

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.

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

Lake Forest residents and businesses are generally satisfied with the City's efforts to provide municipal services and facilities, as well as the quality of life and business climate in the City. More than eight-in-ten residents (81%) and local businesses (87%) indicated that they were satisfied with the City's overall performance in providing municipal services and offered positive ratings (excellent or good) for the quality of life in Lake Forest (91%) and local business climate (79%), respectively.

The high level of satisfaction expressed with the City's performance *in general* was typically echoed when residents and businesses were asked to comment on the City's efforts to provide a variety of specific services. For all but four of the services tested, the City is meeting or exceeding the needs and expectations of at least

80% of its residents (see Figure 32 on page 40), with the highest levels of satisfaction among residents being expressed for the City's efforts to provide garbage collection services, crossing guards near schools, special community events like concerts in the park and holiday celebrations, and tree maintenance.

The results of the 2016 business survey showed a similar pattern of high satisfaction for most services tested. For all of the services tested, the City is meeting or exceeding the needs and expectations of at least 80% of local businesses (see Figure 33 on page 40), with the highest levels of satisfaction among businesses being expressed for the City's efforts to landscape street medians and other parts of the City, provide street sweeping, maintain local streets and roads, and provide building permit services.

Are there any notable trends in the data?

As noted in the *Introduction*, True North recommended that the City of Lake Forest transition to a mixed-methodology for the 2016 resident survey that utilized multiple recruiting methods (telephone and email) as well as multiple data collection methods (telephone and online). Although transitioning to this new methodology improves the overall reliability and comparability of the City's resident survey moving forward, it does create a methodological break in the time series of studies. For this reason, although comparisons between the 2016 resident survey and prior surveys are provided in the graphics included in this report, it's important to keep in mind that a difference in the survey

results could be caused by a change in public opinion, be an artifact of a change in the methodology, or a mixture of both (see *Methodological Changes & Comparisons to Prior Studies* on page 2). This change does not affect comparisons for the business survey over time, as the business study has used the same mixed-method approach for several survey cycles.

The aforementioned caveat notwithstanding, a careful analysis of the resident survey data (both overall and within specific subgroups) suggests that the issues of growth/development and traffic management have increased in saliency over the past several years. These issues figure prominently in response to open-ended questions about what the City could change to improve Lake Forest as a place to live (see *Changes to Improve City* on page 17) and appear in various forms¹ near the top of the priority list for residents (see *Performance Needs & Priorities* on page 38).

That these issues have become more salient for some residents is not surprising. Nor is it a pattern unique to Lake Forest. Prior to the recession, the dominant issues of concern for residents in many southern California communities were growth, development, open space protection, and traffic congestion. In 2006, for example, nearly one-in-four Lake Forest

¹ Although managing growth and development is not tested directly in the list of services, the issues of 'enforcing zoning regulations' and 'issuing building permits' are often seen as proxies for commenting on building and development in a city.

residents (24%) cited traffic congestion as the most important issue facing the City, and 29% indicated they were dissatisfied with the City's efforts to reduce traffic congestion.

As the economy soured in 2008 and then fell into a deep recession, concerns about the economy, jobs market, and economic development began to overshadow other issues in the minds of many residents—in Lake Forest as well as other cities throughout California. The recession was also associated with lighter peak-period traffic conditions in many areas due to higher unemployment, as well as a virtual halt to new construction. During the heart of the recession in 2010, just 3% of Lake Forest residents mentioned growth and 15% cited traffic congestion as the most important issues facing the City. The percentage who indicated that they were dissatisfied with the City's efforts to manage traffic congestion also declined to 23%.

With the economy now in full recovery, low unemployment, and construction resuming, concerns about growth, development, loss of open space, and traffic congestion have begun to return to their pre-recession levels in many communities. When asked what city government could do to make Lake Forest a better place to live, reducing traffic congestion (11%) and limiting growth/development (11%) were the top two specific suggestions in 2016. Recognizing that these combined figures are still lower than their pre-recession levels, they nevertheless have trended upward over the past two survey cycles.

Although the City's ability to manage traffic congestion is limited and residents generally perceive that Lake Forest has less (39%) or about the same level (41%) of traffic as in other Orange County cities, the survey results do indicate that residents and businesses would approve of the City exploring ways to make improvements in this area—especially on major streets in Lake Forest. Synchronizing traffic signals, in particular, was the traffic or transportation-related improvement most desired by residents. For more on the subject of traffic, turn to Traffic on page 43.

Animal control services is another issue that rose higher in the priority list in the 2016 resident survey. Although it is viewed as the least important of the Police services tested and most residents (78%) expressed that they were satisfied with the City's efforts in this area, the percentage who indicated they were dissatisfied was notably higher in 2016 when compared to prior survey cycles.

The picture with Lake Forest businesses is a bit different. Among the business community, the importance assigned to reducing traffic congestion increased substantially when compared to the 2014 study findings, although satisfaction with the City's efforts to manage traffic congestion also increased (+7%). The importance assigned to providing building permits, business watch programs, business networking events, and building inspection services all increased significantly during the past two years, while satisfaction with the City's efforts to provide business networking events and education events declined during the same period.

Where should the City focus its efforts in the future?

In addition to measuring the City's current performance, a key goal of this study is to look forward and identify opportunities to adjust services, improve facilities, and/or refine communications strategies to best meet the community's evolving needs and expectations. Although resident and business satisfaction in Lake Forest is quite high (see above), there is always room for improvement. Below we note some of the areas that present the best opportunities in this regard.

Considering respondents' verbatim answers regarding what they feel city government could do to make Lake Forest a better place to live and work (see *Ways to Improve Lake Forest* on page 17), as well as the list of services and their respective priority status for future city attention (see *Performance Needs & Priorities* on page 38), the top priorities for residents are reducing traffic congestion, managing growth and development/enforcing zoning regulations, providing animal control services, and cleaning up/redeveloping older, deteriorating areas in the city. For local businesses, the top priorities are increasing business networking opportunities, providing business education events, reducing regulations/restrictions, and reducing traffic congestion.

With the recommendation that the City 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. Choosing the appropriate balance of actual service improvements and efforts to raise awareness/

understanding through communications will be a key to maintaining and improving the community's overall satisfaction in the short- and long- term.

It is also important to keep in mind that although these areas represent opportunities to improve resident and/or business satisfaction, the City should not oversteer. Indeed, the main message of this study is that the City does many things exceptionally well and the emphasis should be on continuing to perform at a high level in these areas. The vast majority of residents and businesses were 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.

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 Lake Forest'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.

Keeping up with the challenge of communicating with residents and local businesses has been difficult for many public agencies over the past five years. As the number of information sources/channels available to the public has dramatically increased, it creates greater diversity in where residents and local businesses turn for their information. Not only have entirely new channels arisen and become mainstream (e.g., social media), within these channels there is a proliferation of alternative services. Preferences with respect to information sources are also subject to change as new services are made available, which makes the challenge of communicating with residents and businesses a moving target.

Fortunately, the community survey provides a method for periodically measuring how the communication habits/preferences of local residents and businesses are changing—information that can help the City make timely adjustments to its communication strategies. Although the details can be found in the body of this report (see Communication on page 48), some of the notable trends are the continued migration away from print and toward digital sources (email, City website, e-Newsletter, smart phone app) as the perceived most effective communication channels in both the resident and business communities. In particular, the City is interested in pursuing the development of a smart phone app, a popular communication tool that has shifted the way residents and businesses can conveniently communicate and interact with the City to obtain information or report issues. The proposed Lake Forest smart phone app was a particularly popular item in the 2016 survey, and was rated

among the top three most effective methods of communicating information to the City. Although residents were most interested the app's ability to push emergency notifications to their phone, provide public safety news and events, and allow them to report potholes, graffiti, and other neighborhood concerns, they saw value in all of the app's features (see Mobile App on page 60).



This document was prepared by local government consulting firm Management Partners for the City of Lake Forest.