

Orange County

2005

COMMUNITY INDICATORS

2005

This 6th edition of the Community Indicators report provides an opportunity to look back on recent trends that are shaping our county, and how these trends are impacting Orange County's quality of life. We are already half-way through the first decade of the 21st century, and we are able to better track our progress through the annual update of this report. This year, we also devote some time to documenting the "perceptions vs. reality" for Orange County, an increasingly dynamic topic throughout this decade.

It is probably no surprise that today's Orange County has a high quality of life, with a strong economy and diversified high-tech sector, a low crime rate and good educational system. But it might be a surprise that Orange County is racially and ethnically diverse, and has double the population density of 30 years ago. The county now faces many critical issues similar to other urban areas, such as severe traffic congestion, high priced housing, overcrowding, an increasing homeless population, and aging infrastructure.

The indicators on the following pages track a range of topics important to the county's social and economic health and prosperity. Trends over the past several years show how the county is changing in the areas of our economy, education, health and wellbeing, safety, environment and civic engagement. Many indicators show positive trends, but there are also many areas that can be improved.

While the basic economic, social and health indicators that are annually tracked may remain the same, the overall progress of the county across these indicators provides a very comprehensive view of the quality of life in Orange County. We are hopeful that you are able to utilize this report as a resource as you participate in defining Orange County's future.



Michael M. Ruane
Project Director

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■ New Indicator

◆ Data for at least one element of this indicator is updated every two years.

Introduction

What is a Good Indicator?

Good indicators are objective measurements that reflect how a community is doing. They reveal whether key community attributes are going up or down; forward or backward; getting better, worse, or staying the same. Effective indicators meet the following criteria:

- Reflect the fundamental factors which determine long-term regional health
- Can be easily understood and accepted by the community
- Are statistically measurable on a frequent basis
- Measure outcomes, rather than inputs

Why are Community Indicators Important?

The value of community indicators is to provide balanced measurements of the factors which contribute to sustaining community vitality and a healthy economy, including economic, social, quality of life, and environmental measurements. They also provide a picture of the county's overall social and economic health over time. The narrative for each community indicator defines why the indicator is important to the community and measures community progress.

Selection Criteria

The indicators selected for inclusion in the Orange County Community Indicators report represent broad interests and trends in Orange County and are comparable to indicator efforts in similar communities throughout the nation. The indicators that were selected also meet the following specific criteria:

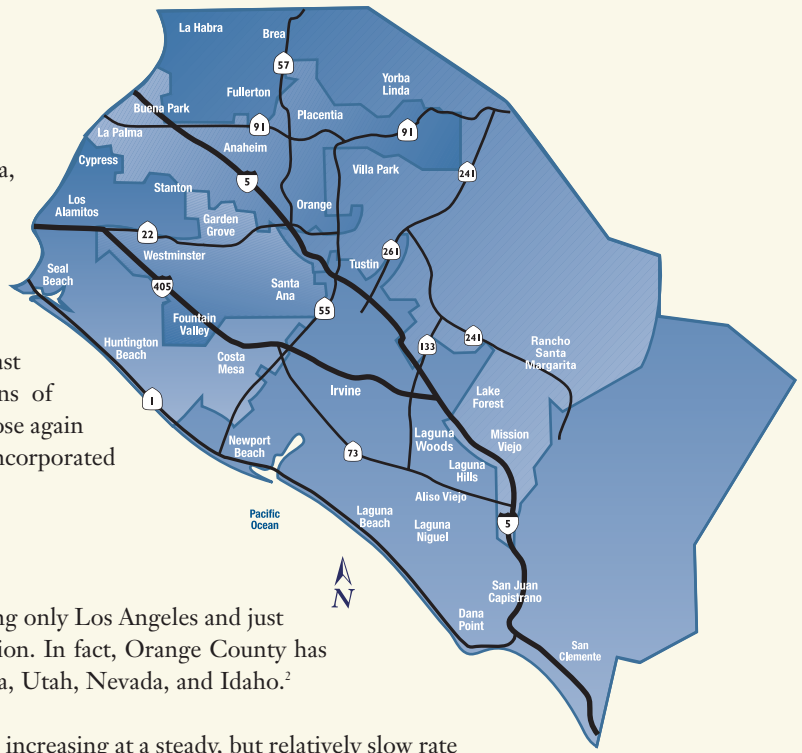
- Illustrate countywide interests and impacts as defined by impacting a significant percentage of the population
- Include the categories of economic development, technology, education, community health and prosperity, public safety, environment, and civic engagement
- Reflect data that is both reliable and available over the long-term

Peer Counties

To gain a better understanding of the state of the county in relation to other metropolitan areas, Orange County is compared to neighboring and/or certain peer counties or regions in many of the indicators presented in this report. Neighboring counties include: Los Angeles, San Bernardino, Riverside, and San Diego Counties. Peer regions are metropolitan areas that have similar economic or demographic characteristics as Orange County and thus are considered economic competitors. They include: Atlanta, Austin, Boston, Minneapolis (or Twin Cities), Research Triangle (North Carolina), San Francisco Bay Area (or Santa Clara County or the San Jose Metropolitan Area), and Seattle.

County Profile

Orange County is located in the heart of Southern California, with Los Angeles County to the north, San Diego County to the south, and Riverside and San Bernardino Counties to the east. There are currently 34 cities within the county, several which have recently incorporated. During the 1990s the unincorporated population rose slowly to a high of about 209,000 in 1999, then steadily dropped over the last few years to 109,000 in 2003 following the incorporations of Rancho Santa Margarita (2000) and Aliso Viejo (2001), and rose again in 2004 to about 113,000 due to development within unincorporated areas.¹



POPULATION

Growth

Orange County is the 2nd largest county in California, trailing only Los Angeles and just surpassing San Diego, and the 5th largest county in the nation. In fact, Orange County has more residents than 21 of the country's states, including Iowa, Utah, Nevada, and Idaho.²

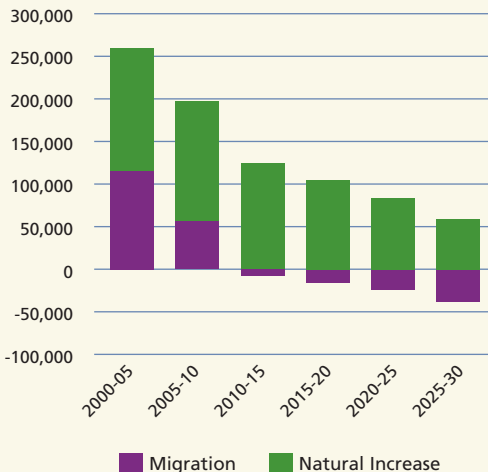
Over the past 30 years, Orange County's population has been increasing at a steady, but relatively slow rate compared with its growth in the previous 30 years. In 1950, Orange County's population numbered 216,224. By 1970, that number had increased to over 1.4 million people, growing an average of 22% per year during the 50s and 10% per year in the 60s. During the 70s, the county's population growth slowed to an annual average of 3.6%, and during the 80s it slowed even further to 2.5%. Between 1990 and 2000, the average annual rate of increase was 1.8% and from 2000 to 2004, the average annual rate of change was 1.7%.³

Numeric Population Growth Top 15 Counties, 2002-2003

County (Major City)	State	Rank
Los Angeles	CA	1
Maricopa (Phoenix)	AZ	2
Riverside	CA	3
Clark (Las Vegas)	NV	4
Harris (Houston)	TX	5
San Bernardino	CA	6
Tarrant (Fort Worth)	TX	7
Orange	CA	8
Sacramento	CA	9
Will (Joliet)	IL	10
Collin (Dallas)	TX	11
Palm Beach	FL	12
Broward (Fort Lauderdale)	FL	13
San Diego	CA	14
Bexar (San Antonio)	TX	15

Source: U.S. Census Bureau

Components of Population Growth, 2000-2030



Source: Center for Demographic Research, California State University, Fullerton, Orange County Projections 2004

Despite the slowing rate of growth since the 50s, Southern California remains one of the fastest growing regions in the nation in terms of numeric population growth. In January 2004, Orange County's population was 3,017,300.⁴ While certain counties in the San Francisco Bay Area continue to lose population, Orange County ranked 8th out of over 3,000 U.S. counties in terms of numeric population growth between 2002 and 2003, adding about 32,000 people. Orange County's slow growth rate puts it at 835th in the nation in terms of percent change between 2002 and 2003 largely due to the fact the county's base population is already so large, not because the county is no longer growing.⁵ The county's steady population growth is expected to continue, with population projections in Orange County of nearly 3.1 million by 2005 and 3.6 million by 2030.⁶

Between January 2003 and 2004, Irvine accounted for the largest numeric and percent population growth in Orange County, adding 7,000 new residents and growing at a rate of 4.2%. Among California's 477 cities, Irvine places 51st for the fastest growth rate and 10th for greatest numeric change. Seal Beach grew the slowest at 0.2% or 50 new residents.⁷

Migration Versus Natural Increase

From the 1950s through the early 70s, much of the county's growth came from migration into the county from within the state and from other states. This trend has changed. Orange County is no longer a major destination for the 49 states and more people are moving out of Orange County to other California counties than moving in. Still, in-migrants have outnumbered out-migrants due to immigration, mostly from Asia and Central America, shifting the county's proportion of foreign born from 6% in 1970 to 30% in 2000. As immigration levels taper off, out-migration will exceed in-migration and the current trend of the vast majority of Orange County's population growth being generated internally through natural increase (births minus deaths) will continue.⁸

Density

Orange County is one of the most densely populated areas in the United States and is second only to San Francisco for the most densely populated county in California. As of January 2004, Orange County's population density was estimated at 3,822 persons per square mile, an average increase of about 1.7% annually since 2000. The county is denser than Los Angeles County, more than 2.5 times denser than Santa Clara and Sacramento Counties and five times denser than San Diego County, which has roughly the same population.⁹ Within the county, 2004 densities vary by location, from a low of 386 persons per square mile in unincorporated areas to highs of 9,553 in Garden Grove, 12,452 in Stanton, and 12,788 in Santa Ana.¹⁰

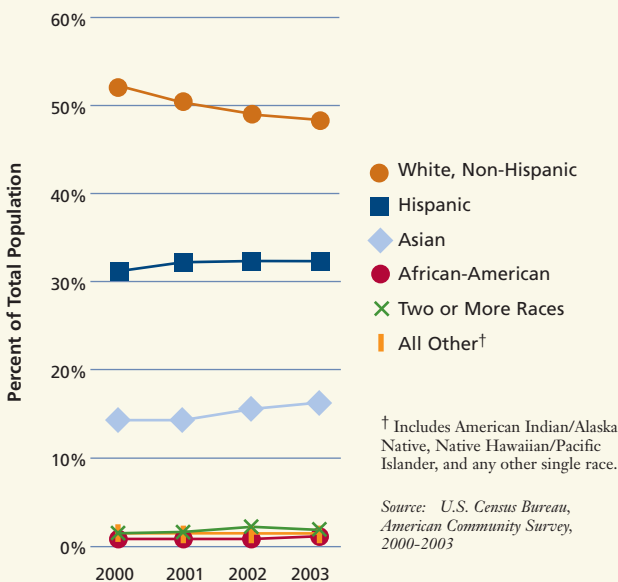
Average Household Size

As of 2003, the average Orange County household had 3.0 persons living there, higher than the California average of 2.9 and the national average of 2.6.¹¹ Only 14 of the 58 counties in California have higher average household sizes than Orange County. Household size varies by city. Santa Ana has the highest household size (4.7), followed by Garden Grove (3.7), and Stanton (3.5). High housing prices can lead to overcrowding (when the household has more occupants than the housing unit was designed to accommodate). Overcrowding can have numerous negative consequences and is discussed in more detail in the Family Wellbeing indicator (page 46).

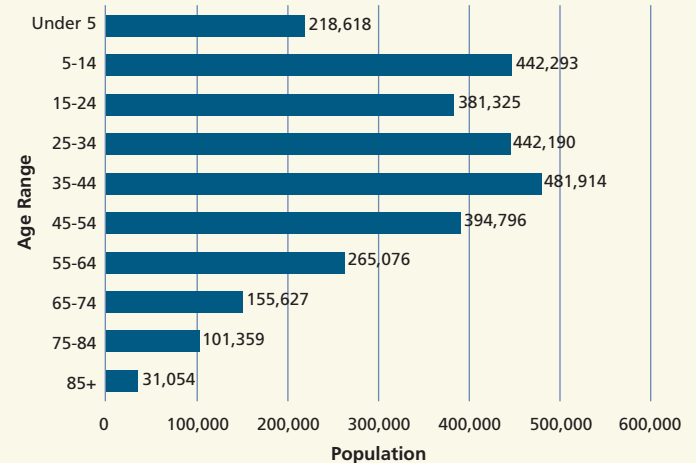
Ethnicity and Age

The latest data suggest the trend toward greater ethnic diversity continues. Orange County is now a "minority majority" county where no single racial or ethnic group comprises more than 50% of the total population. Whites comprised 49.1% of the total county population in 2003, down from 51.3% in 2000. Hispanics comprised 32.3%, up from 30.9% in 2000. Asians rose from 13.7% to 14.9% over this same period.¹²

Population by Ethnicity
Orange County, 2000-2003



Population by Age
Orange County, 2003



Orange County's population by age peaks in two places: the five to 14 age group and the 25 to 44 age groups. The county's median age in 2003 was 35. Projected growth among the various age groups differs by ethnicity. Orange County's White population is aging while all other races and ethnicities are projected to show growth in the child and young adult populations.¹³

EMPLOYMENT

Orange County enjoys a diverse economy, with economic output and employment well distributed among sectors. The employed labor force in 2003 was approximately 1.52 million, with the largest labor markets comprised of trade (19%), business and professional services (18%), and manufacturing (13%). Sectors with the most rapid growth over the past 10 years have been construction, professional and business services, and leisure and hospitality.¹⁴

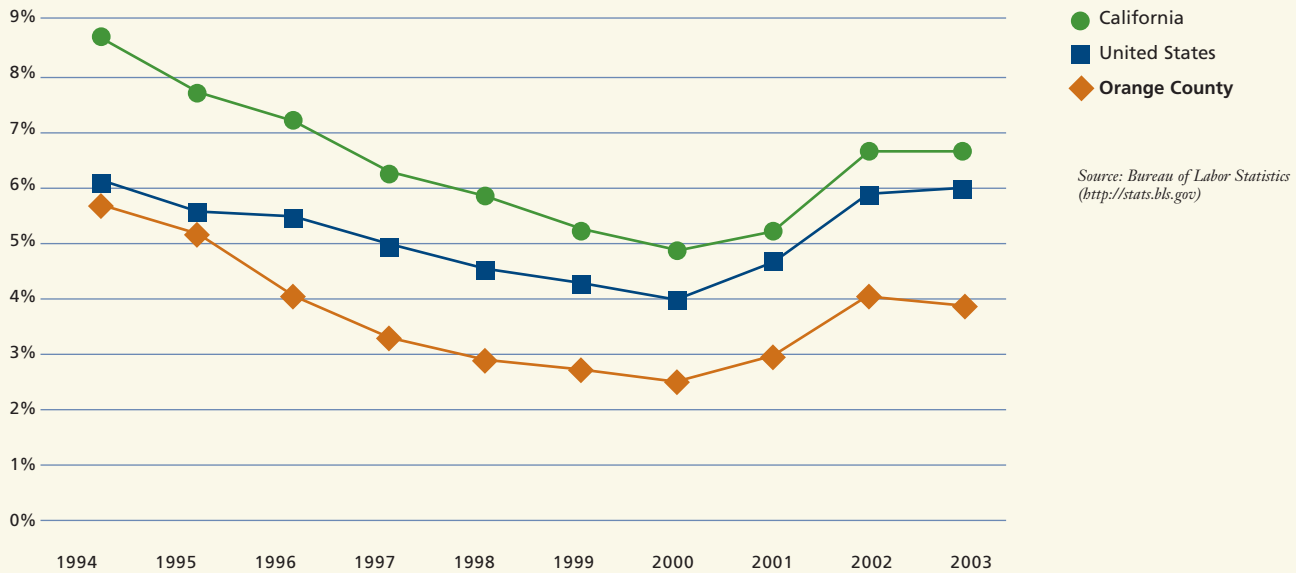
Industry projections for 2001 to 2008 indicate that the services sector will grow 22%, driven primarily by growth in business services. Manufacturing is projected to grow 11% with the durable goods sector accounting for most of the job growth, particularly electronic, transportation, and communications equipment. Trade is expected to grow 13% with a majority of new jobs in retail trade.¹⁵

Small businesses flourish in Orange County's entrepreneurial climate, with only 18% of residents working in companies employing more than 500 people, compared with the state average of 21% in 2003. Firms with fewer than five employees grew the most over the past five years (13%). Firms with fewer than 50 employees grew 9% compared to firms with between 50 to 499 employees which grew 3% and firms with over 500 employees which grew only 1%. Similar to trends nationwide, employment at large companies with over 1,000 employees has declined in Orange County over the past five years. Job growth in smaller firms has more than made up for the losses in these larger firms.¹⁶

Unemployment

In 2003, Orange County's average unemployment rate of 3.8% was second only to Washington D.C. for the lowest unemployment rate among metropolitan areas with populations over one million. Orange County had a lower unemployment rate than California (6.7%) and the United States (6.0%). Historically, after a declining unemployment rate for much of the 1990s, Orange County's rate began to rise after 2000 but dipped down again in 2003.

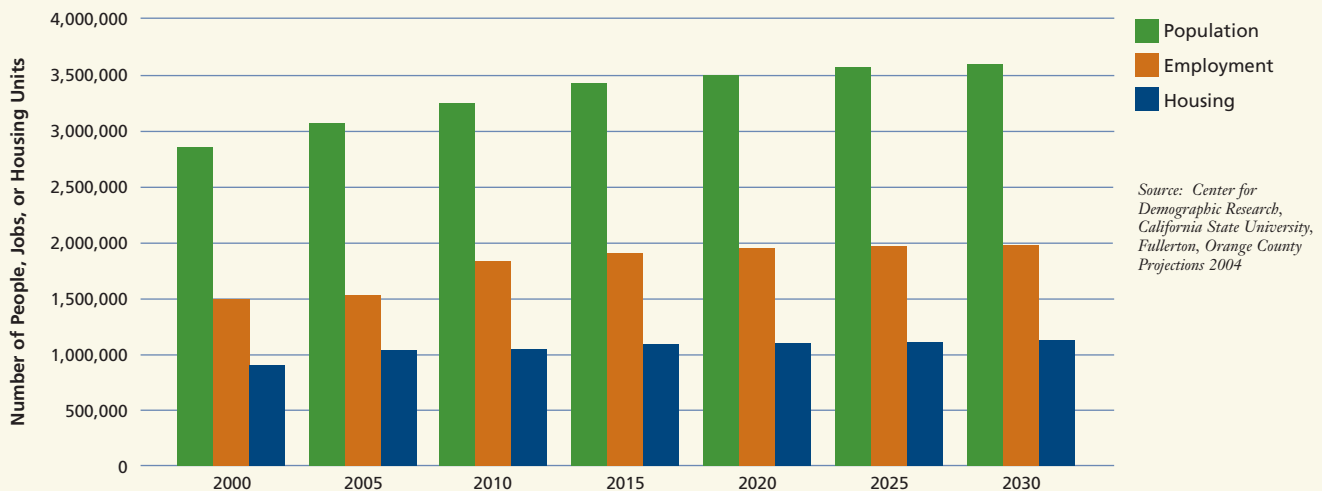
Unemployment
Average Annual Rate, 1994-2003



HOUSING

As of 2004 there were 1,024,365 housing units available to county residents, 50% of which are single-family detached units. A majority of occupied units are owner-occupied (60%) compared to renter-occupied (40%).¹⁷ As described further in the following report, the cost of single-family homes and multiple-family dwellings is increasing, along with rental costs. In the next five years (2005 to 2010), housing projections for the county anticipate over 35,000 housing units to be added. This equates to 40% of the total housing units expected to be added over the next 25 years.¹⁸

Population, Employment and Housing
Orange County, 2000-2030



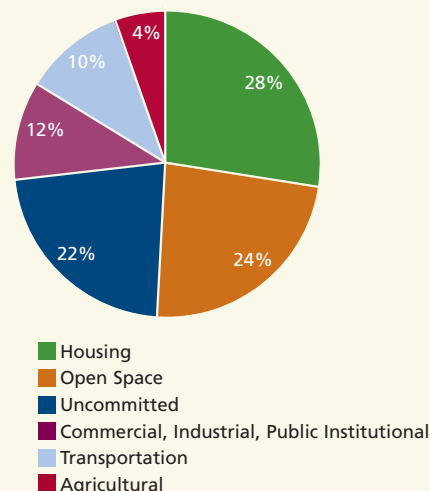
LAND USE

Orange County covers 798 square miles of land, including 42 miles of coastline. Substantial portions of the county are devoted to residential housing of various types (28%). Commercial, industrial, and public institutional uses account for only 12% of the county's total land area. Nearly a quarter of the county is classified as uncommitted, meaning it is either vacant or there is no data available for that land. Another quarter of the county's land is dedicated to open space and recreation, much falling within the Cleveland National Forest, for a total of about 124,000 acres. In addition to National Forest land, the open space and recreation facilities maintained by the County of Orange include nine beaches, three harbors and over 38,000 acres of regional parks (about 60 square miles) for the enjoyment of county residents and the protection of natural resources. Orange County's many cities and state agencies contribute a significant portion to the overall total of local park and open space facilities.

Note: These figures have been revised and should not be compared to the figures printed in previous Community Indicators reports.

Source: County of Orange, Resources & Development Management Department, November 2004

Orange County Land Uses, 2004



Per Capita Property Tax Allocation Among Large Counties and Cities, 1999/00

Large Counties	Per Capita Property Taxes	Large Cities	Per Capita Property Taxes
Santa Clara	\$153	Oakland	\$147
Los Angeles	139	Los Angeles	142
Alameda	121	San Diego	118
Contra Costa	116	Long Beach	101
Statewide County Average	115	Statewide City Average	85
Sacramento	101	San Jose	82
San Diego	94	Fresno	62
Riverside	77	Anaheim	56
San Bernardino	66	Santa Ana	56
Orange	51	Riverside	43

Source: California Legislative Analysts Office (www.lao.ca.gov/2002/cal_facts/finances.html)

STATE AND LOCAL FINANCES

Orange County is what is referred to as a “donor county” – the county government receives from the state the least amount of property taxes per capita (\$51) among large counties in California. The same is true for Orange County cities – Anaheim and Santa Ana are at the bottom of the allocation among large cities (both at \$56). The smaller allocations would suggest that Orange County and its large cities, in comparison to other large counties and cities in California, did not receive a large share of countywide property taxes before Proposition 13.¹⁹

GROSS COUNTY PRODUCT

If Orange County were a country, its gross product in 2003 would rank 42nd in the world – ahead of such nations as Ireland, Iran, and Thailand. Among metro areas in the United States, Orange County has the 11th largest gross product, behind Los Angeles (2nd) and Boston (4th) and ahead of Minneapolis-St. Paul (12th), Phoenix (13th), and San Diego (14th). Orange County improved in rank in terms of 10-year average annual gross metro product growth. The county is now among the top 50 metro areas, rising from 59th between 1992 and 2002 to 46th between 1993 and 2003.²⁰ This improvement may reflect the diversification of the economy, its resiliency in the face of downturns, and growth in some higher value industries.

¹ Center for Demographic Research, California State University, Fullerton, Orange County Progress Report 2004

² U.S. Census Bureau, Population Division, State Characteristic Estimates and County Population Estimates, July 1, 2003 (<http://eire.census.gov/popest/estimates.php>)

³ California Department of Finance (www.dof.ca.gov/html/Demograp/repndat.htm) as reported by Center for Demographic Research, California State University, Fullerton, Orange County Progress Report 2004 (www.fullerton.edu/cdr)

⁴ California Department of Finance, January 2004 Cities/Counties Ranked by Total Population, Numeric Change, and Percent Change (www.dof.ca.gov/html/Demograp/repndat.htm)

⁵ U.S. Census Bureau (<http://eire.census.gov/popest/data/counties.php>)

⁶ Center for Demographic Research, California State University, Fullerton, Orange County Projections 2004

⁷ California Department of Finance, January 2004 Cities/Counties Ranked by Total Population, Numeric Change, and Percent Change (www.dof.ca.gov/html/Demograp/repndat.htm)

⁸ Center for Demographic Research, California State University, Fullerton, Orange County Projections 2004

⁹ U.S. Census Bureau (www.census.gov/prod/cen2000/phc-1-6.pdf) and Center for Demographic Research, California State University, Fullerton, Orange County Progress Report 2004

¹⁰ Center for Demographic Research, California State University, Fullerton, Orange County Progress Report 2004

¹¹ U.S. Census Bureau, 2003 American Community Survey (<http://factfinder.census.gov>)

¹² U.S. Census Bureau, 2000-2003 American Community Survey (<http://factfinder.census.gov>)

¹³ U.S. Census Bureau, 2003 American Community Survey and Center for Demographic Research, California State University, Fullerton, Orange County Progress Report 2004

¹⁴ Employment Development Department, Labor Market Information (www.calmis.cahwnet.gov/htmlfile/subject/cosnaps.htm and www.calmis.cahwnet.gov/htmlfile/subject/indtable.htm)

¹⁵ California Employment Development Department, Labor Market Information (www.calmis.cahwnet.gov/htmlfile/subject/indproj.htm)

¹⁶ Employment Development Department, California Size of Firm Report, 1999-2003 (www.calmis.cahwnet.gov/htmlfile/subject/INDSIZE.HTM)

¹⁷ DemographicsNow.com (www.demographicsnow.com) and U.S. Census Bureau, 2003 American Community Survey Summary Tables (www.census.gov/acs/www/index.html)

¹⁸ Center for Demographic Research, California State University, Fullerton, Orange County Projections 2004

¹⁹ California Legislative Analysts Office (www.lao.ca.gov/main.aspx?type=2&PubTypeID=3)

²⁰ U.S. Conference of Mayors, U.S. Metro Economies, October 2004 (<http://usmayors.org/uscm/home.asp>)



Special Features

Perceptions of Orange County Lag Behind Changing Realities

Description of Indicator

This indicator compares Orange County to California over the last 30 years, illustrating similarities and differences, and changes that have occurred in our region. It documents Orange County’s transformation from a region dominated by farmland and middle-class suburbs to the diverse urban area it is today. The data examined includes demographic and employment trends, political climate, personal wealth, and government finances and school funding.

Why is it Important?

Orange County today is significantly different than its legacy perception as an agriculture-influenced, manufacturing-driven suburban community. The perception of Orange County as a wealthy and conservative community with little ethnic or racial diversity has also been reinforced by popular television shows. In reality, the Orange County of 2004 is the nation’s 5th most-populous county and a major urban metropolis in its own right. By describing the socioeconomic transformation occurring in Orange County, driven by a diversifying population and economy, this indicator will help document a more realistic picture of Orange County. Along with this transformation comes a new reality – and the need for a new look at government services including infrastructure and utilities maintenance, education, health care, and emergency services.

How is Orange County Doing?

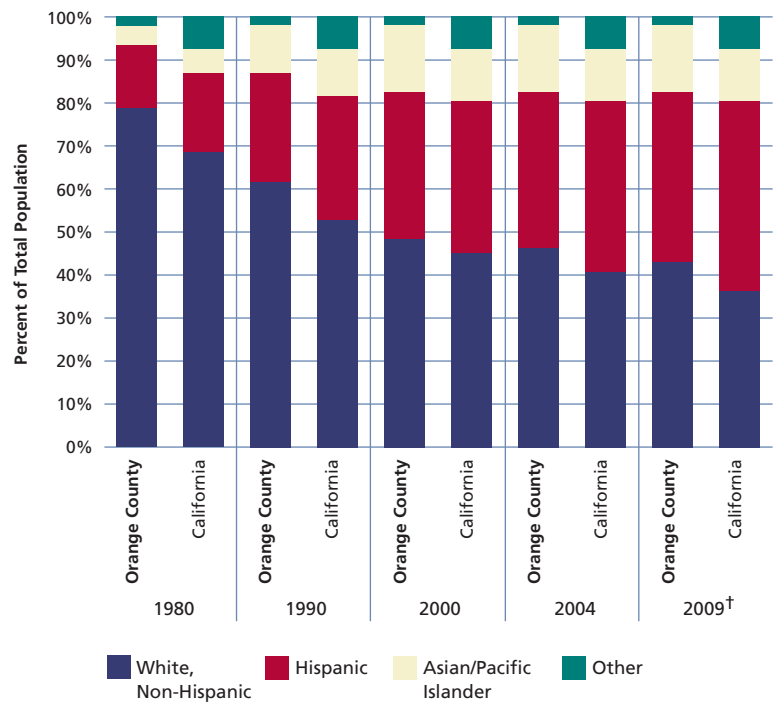
Demographic Trends

Orange County is often thought of as significantly less diverse than other counties in California. While this may have been true at one time, it is no longer the case. In 1980, Census figures found that Whites made up 79% of the total county population, whereas Hispanics constituted 15% and Asian/Pacific Islanders comprised an even smaller proportion at 4%. Compared to California in 1980 (69% White, 19% Hispanic, and 5% Asian/Pacific Islander), Orange County did indeed have a higher concentration of Whites than the state.

Today, Hispanics represent 33% of the county’s population, and Asian/Pacific Islanders are 14% of the county’s nearly three million residents. These 2004 figures are more closely aligned with California numbers, where Hispanics currently comprise 36% and Asian/Pacific Islanders make up 11% of the state’s nearly 36 million residents. More importantly, in 2003, 49% of all the live births in Orange County were to Hispanic mothers. With the county projected to continue this diversification, the perception of Orange County as homogeneously White is no longer accurate.

Also, as stated in the County Profile section of this report, Orange County has a much higher population density than would be expected in “suburbia,” more than double the 1,779 people per square mile of 1970.

Change in Racial and Ethnic Diversity
Orange County and California, 1980-2009



† Projection

Source: *DemographicsNow.com*

Employment Composition

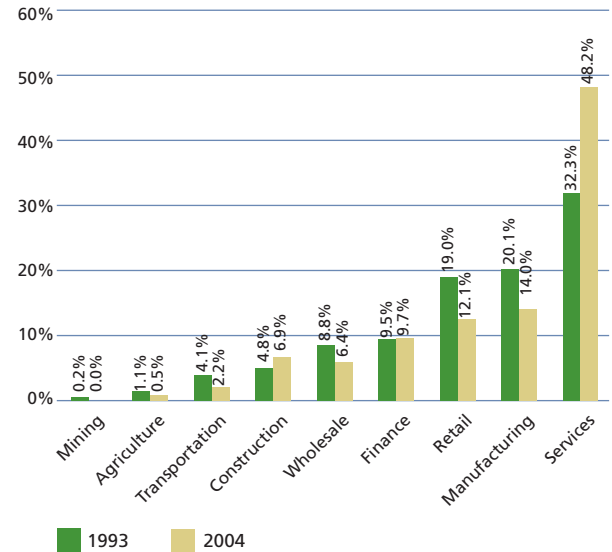
Orange County has also changed in the composition of its employment. During the high growth 1970s and 1980s, Orange County was a manufacturing hub of the defense and aerospace industries. However, with the end of the Cold War and rising land prices, manufacturing became less dominant and cost effective in Orange County. As a result, Orange County has increased our employment in services, ranging from lower paying retail and tourism services to higher paying technical and professional jobs. Even as recently as 1993, Orange County had significantly more employment in manufacturing and less in services than California as a whole. However, by 2004, services employment increased in both Orange County and California. Also, finance, insurance and real estate employment decreased in California between 1993 and 2004, but increased in Orange County. In summary, over the last several years Orange County has transformed from a manufacturing hub to a services and finance hub more closely resembling the patterns of California as a whole.

Political Climate

In the past Orange County was a stronghold of conservatism, with a reputation for political views at odds with much of California. Today, the county’s politics are beginning to mirror our changing demographics. A 1990 survey asked adult Orange County residents, “Would you consider yourself to be very liberal, somewhat liberal, middle-of-the-road, somewhat conservative, or very conservative?” The same question was asked in 2003, and the results were somewhat different. The proportion considering themselves “very” or “somewhat” liberal stayed about the same, but in 2003, 5% more called themselves “middle of the road” and the percentage of respondents calling themselves “very” or “somewhat” conservative decreased 6%.

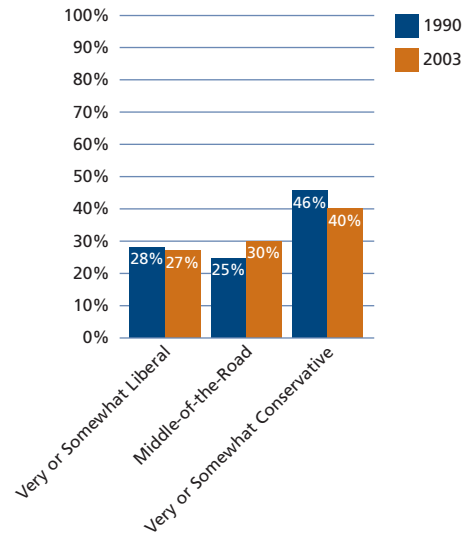
In 2004, the Public Policy Institute of California conducted a similar survey of adult residents throughout the state. Compared to Orange County residents, in 2004 slightly more Californians called themselves “very” or “somewhat” liberal (31%), about the same number classified themselves as “middle-of-the-road” (31%), and slightly less saw themselves as either “very” or “somewhat” conservative (35%). The perception of Orange County as a bastion of conservatism is becoming less accurate as the political views in the area shift closer to the rest of California.

Percent of Employment by Industry
Orange County, 1993 and 2004



Sources: County Business Patterns and California Employment Development Department

Political Orientation
Orange County, 1990 and 2003



Sources: Orange County Annual Survey 1990 and Public Policy Institute of California Statewide Special Survey of Orange County in collaboration with the University of California, Irvine 2003

Personal Wealth

Convergence with California characteristics is evident in Orange County trends in personal wealth as well. In 1980, the per capita income in the county was \$9,564 and the median household income was \$25,576. These figures were 13% and 29% higher than the per capita and median household income in California. In 2004, per capita income in Orange County was \$27,722 with the median household income reaching \$63,689. Compared to a 2004 California per capita income of \$24,152 and median household income of \$51,212, Orange County’s per capita income is still 13% higher, but median household income dropped significantly to 20% higher than the state’s median.

Even more telling are projections that Orange County’s per capita income in 2009 will be \$27,424, declining from 2004 levels. The same projections indicate a 2009 California per capita income of \$24,428. If the projections are realized, the gap between Orange County and California per capita income levels will be reduced to 11%. While Orange County is still relatively more affluent than the state as a whole, the gap is diminishing, and convergence with state averages is projected to continue.

Local Finances and School Funding

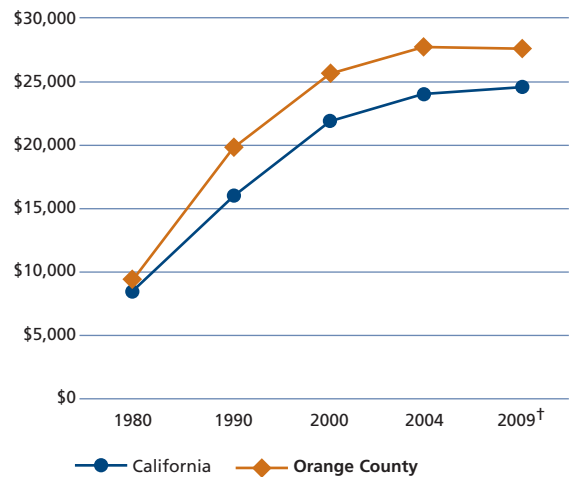
The 2004 Community Indicators report provided a Special Feature on public finance which detailed Orange County’s status as a donor county, meaning that we send more tax dollars to Sacramento than we receive in services. This inequity is based on formulas developed in 1979 that reflected the county’s more rural character. Today, although the county is more urbanized as reflected in two-fold increases in population density, we still receive the same ratio of funds as in 1979. This results in Orange County receiving only 7% of its residents’ property taxes to use for local governmental services. Comparatively, Los Angeles County receives 26% of tax dollars paid and San Francisco County receives 64% of tax dollars paid.

As a result of this donor county status, Orange County is disadvantaged in our financing for a variety of countywide needs including education. The 2004 Community Indicators report provided a Special Feature on school capacity and the challenge of meeting the needs of schools. Orange County schools remain under-funded, as payments to school districts are also governed by outdated formulas based upon a relatively sparsely populated county in 1979. In fact, during the 2002/03 school year, the average per pupil expenditure for grades K-12 in Orange County was \$6,715, whereas the average per pupil expenditure in California was \$7,244.

Summary

The Orange County of today is much different from the Orange County of 40 years ago which was more homogeneously White, affluent, and conservative. The county’s demographics, employment, income, and political leanings are now more similar to California’s and will likely continue to converge in the future. Orange County is now predominately urban and faces the array of problems that comparable urban areas face. While media images may not change, changes in the allocation of resources to address the new reality of Orange County will be essential.

Per Capita Income
Orange County and California, 1980-2009



† Projection

Source: DemographicsNow.com

New Development Trends Toward Higher Land Use Efficiency

Description of Indicator

This indicator uses average gross and net density of proposed new development compared to existing housing stock to gauge whether Orange County is developing in an efficient manner compared to the past.¹

Why is it Important?

Orange County is facing a continued housing crisis driven by the combination of a stable and expanding local economy, population growth, and a persistently insufficient supply of housing to meet demand. The county's long-term economic health as well as environmental wellbeing and quality of life depends in large part on how and when new housing is developed. Using land efficiently through increased housing density can reduce infrastructure costs, preserve land for other uses, make public transit more effective, and lower housing costs. Well planned, high-density developments can improve quality of life by increasing opportunities to walk to nearby shops, schools, or restaurants.

How is Orange County Doing?

Trends

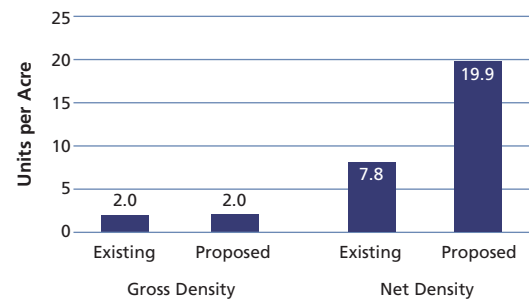
Orange County's gross housing density in the past, present or near future does not show change. Dividing the existing housing stock (the majority of which was built in the 60s and 70s) by the total number of acres of land in Orange County results in a gross housing density of 2.0 units per acre. In the recent term, between 2000 and 2002, 10,650 acres of agricultural, rural or vacant land were converted to urban uses or built-up land. When compared to the residential permits issued in this period, the gross housing density equals 2.0 units per acre.² Looking into the near future, the average gross density of proposed housing projects in Orange County as of June 2004 is also 2.0 units per acre.

In terms of net density, dividing the existing housing stock by the number of acres dedicated exclusively to residential development in Orange County results in a net density of 7.8 units per acre. This compares to the proposed net density of new projects at approximately 19.9 units per acre. Proposed single-family homes are planned to be built at an approximate density of 6.8, while multi-family units and condos are planned to be built at a density of 38.4 units per acre.

Gross Versus Net Density

Housing density can be measured in two ways and both tell a story of how efficiently a region grows and urbanizes. Gross density is the number of units per acre of land included in the project. Net density is the number of units per acre of land dedicated to housing in a given project (e.g. acres devoted to roads, parks, commercial, etc. are removed from the calculation).

Housing Density
Orange County, 2004



Sources: Meyers Group, *LandPro*, 2nd Quarter 2004; Department of Finance, *Table E-5 City/County Population and Housing Estimates, 2004, Revised 2001-2003, with 2000 DRU Benchmark* (www.dof.ca.gov/html/Demograp/E-5text2.htm); County of Orange Resources & Development Management Department; California State University, Fullerton, Center for Demographic Research, *Orange County Progress Report 2004*

¹ Includes projects of 10 units or more and only counts projects for which at least preliminary jurisdictional approval has been won. Gross density is calculated using total project area as the denominator. Net density is calculated using the typical lot size for each detached housing project and the total project area of an attached housing project. A total of 76 projects were included in the calculation of gross density but only 73 projects were included in the calculation of net density since the data for three detached housing projects did not include typical lot size.

² California Department of Conservation, *California Farmland Conversion Report* (www.consrv.ca.gov/dlrrp/fmmp/index.htm)

Analysis

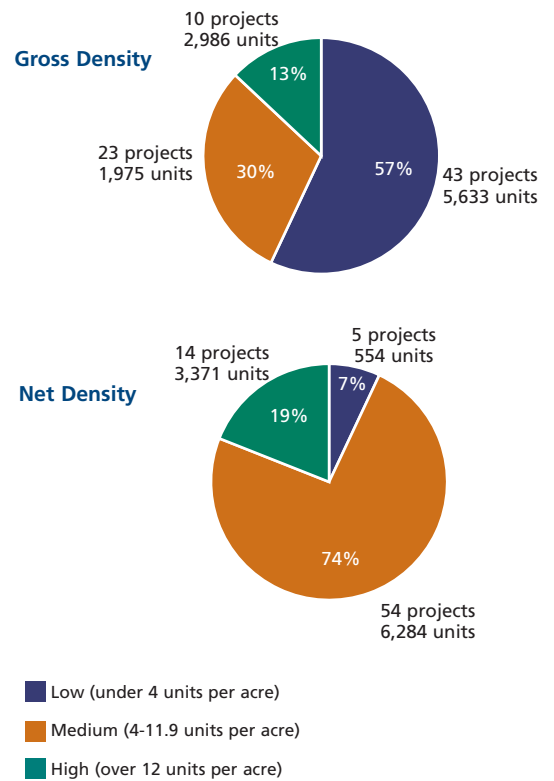
The relatively low gross density suggests that on a macro scale Orange County is continuing the low density development patterns that typified the last decades of construction. The National Association of Home Builders considers four units per acre typical suburban or low density development and most projects and units proposed in Orange County fall under four units per acre (57%). While there is considerable variation by region within the county, with largely built out areas building higher density projects, the average is low density.

However, the net density figures show that individual neighborhood density is increasing, suggesting that more land in a given project is being dedicated to non-housing uses like roads, parking, commercial development, open space, or golf courses. Additionally, as flat lots become scarcer, portions of a project area may be unable to be developed due to slope and site conditions. All these factors contribute to an overall low gross density while driving up net density.

Efficiency is gained when housing is clustered densely leaving more opportunity for open space, parks and commercial centers near neighborhoods. Transit performance and walkability are also improved. Eight units per acre are generally thought to be the minimum for supporting public transportation and, on average, new neighborhoods in Orange County exceed that density.³

Density measures do have limitations. They cannot tell us specific detail about how a project is designed or built. For example, a high density development may not realize efficiency and quality of life benefits such as increased transit use, safety, and walkability if the development is surrounded by major thoroughfares or if shops, jobs or schools are not in close proximity. Density measures also cannot tell us the cost of the housing or whether the housing is owner- or renter-occupied.

Density of New and Proposed Projects Orange County, 2004



Source: Meyers Group, LandPro, 2nd Quarter 2004

Gross Units per Acre of Proposed Projects by Region Orange County, 2004

Region	Units per Acre	Number of Units
Central	4.4	4,632
North	2.7	1,131
South Coastal	1.6	1,810
North Coastal	1.3	1,663
South Inland	1.0	1,358

Source: Meyers Group, LandPro, 2nd Quarter 2004

³ Creating Great Neighborhoods: Density in your Community (www.realtor.org/SG3.nsf/files/DensityManual.pdf/SFILE/DensityManual.pdf)

Economic and Business Climate



Tourism generated \$432 million in revenues, and county **exports rebounded**. Per capita income grew, but the strongest industry job growth was in **lower paying** service sectors. Business executives view the county as a **less attractive** place to do business. As in the past, few residents can afford to buy the median-priced home and rents are high.

Business Optimism Falls Again for Fourth Straight Year; National Rankings Mixed

Description of Indicator

This indicator measures Orange County's business climate through two sets of information: a survey of how business executives in Orange County feel about doing business here (Orange County Executive Survey) and national rankings of the best regions in the nation for business (Forbes).

Why is it Important?

A region's business climate reflects its attractiveness as a location, the availability of business support and resources, opportunities for growth, and barriers to doing business. Since businesses provide jobs, sales tax dollars, and economic entrepreneurship and growth, a strong business climate is important for maintaining Orange County's economic health and quality of life.

How is Orange County Doing?

Orange County Executive Survey

In 2004, 20% of Orange County executives surveyed stated that the county was becoming a more attractive place to do business. This is the fourth year in a row that this rating has dropped, bringing the county to the lowest rating since 1995. Nearly twice as many executives (39%) believe Orange County is becoming a less attractive place to do business. Despite the negative trends, business sentiment is still better than the early 1990s; only 6% of executives polled in 1992 thought the county was becoming more attractive for business. Although the county's desirability as place to live is the top reason for its attractiveness, this reason is down compared to 2000, when 32% of respondents listed it as the top reason. Traffic had been ranked as the primary negative factor in the 2000, 2001 and 2003 executive surveys and the cost of housing was the primary negative factor in 2002 and 2004.

Forbes

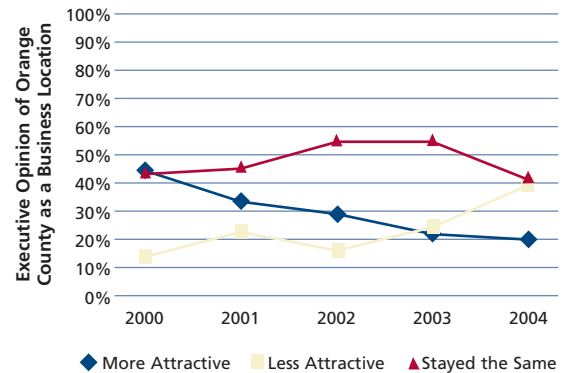
Among the best places for business according to Forbes, Orange County ranked 40th out of the 150 metro areas compared in 2004. This was better than 2003 when Orange County was 72nd, but significantly worse than 2002 when Orange County was 10th and 2001 when it was 11th. However, Orange County has consistently out-ranked all other major California locations except San Diego. The Forbes ranking compares business costs, qualifications of the work force, job and income growth, migration patterns, crime rates and culture and leisure options.

Top Markets for Retail Investments, 2004	
1	Orange County
2	Washington DC
3	San Diego
4	Fort Lauderdale
5	San Francisco
6	Riverside-San Bernardino
7	West Palm Beach
8	Los Angeles
9	New York-Manhattan
10	Oakland

Note: This survey is based on a one-time series of 12-month forward looking supply and demand indicators such as employment forecasts, household growth, retail vacancy rates, retail construction, personal income growth and rent growth.

Source: Marcus & Millicap Research Services quoted in the Wall Street Journal, May 12, 2004

Business Sentiment, 2000-2004

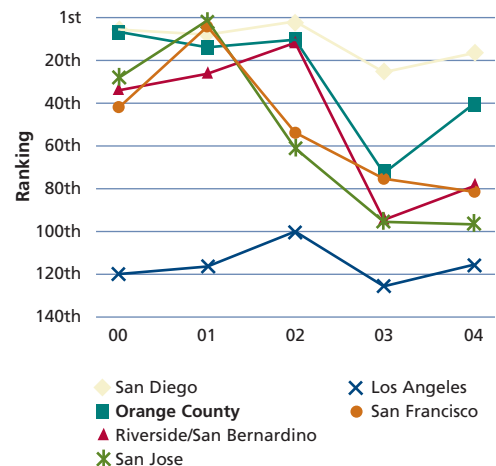


Factors Contributing to or Detracting from Orange County as a Business Location, 2004

Major Positive Factors	
Desirable place to live	20%
Centrally located relative to markets	19%
Business' customers are here	13%
Major Negative Factors	
Cost of housing	23%
Cost of doing business	17%
Traffic	15%

Source: Orange County Executive Survey, 2004

Best Places for Business Regional Comparison, 2000-2004



Source: Forbes Magazine, May 5, 2004 (www.forbes.com/2004/05/05/04bestplacesland.html)

Tourism Generates Tax Receipts of \$432 Million

Description of Indicator

This indicator measures travel industry jobs, visitor spending on accommodations, food, recreation, retail sales and travel arrangements, and tax revenue generated by visitor spending.

Why is it Important?

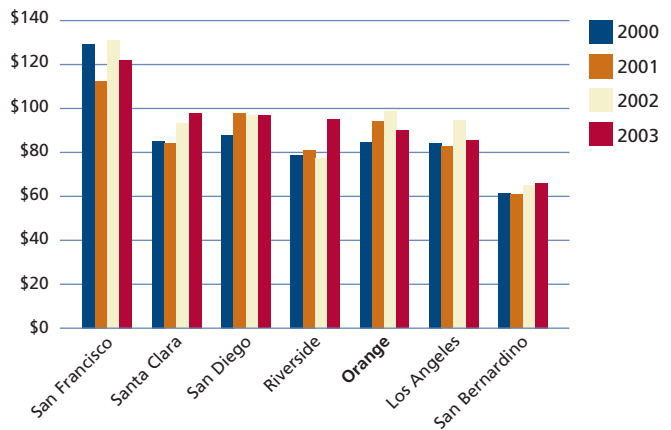
Visitors traveling to Orange County for recreation and business generate revenue and jobs for the local economy. Tourism is one of the leading industries in Orange County, accounting for 9% of the county's employment in 2003. Hotels, shops, restaurants, and entertainment venues rely on tourism for a significant percentage of their business. Orange County jurisdictions benefit from tax revenue generated by visitor spending.

How is Orange County Doing?

Average daily visitor spending fell a little over eight dollars in 2003 to \$90.20 per visitor per day. Orange County has the 5th highest daily visitor spending among the counties compared. Visitor spending in Orange County increased at an annual rate of 2.9% from 1998 to 2002, faster than Los Angeles, Santa Clara, and San Francisco Counties, but slower than Riverside and San Bernardino Counties. Tourism generated \$432 million in tax receipts for Orange County in 2002, behind Los Angeles and San Diego Counties but ahead of San Francisco, Riverside, Santa Clara and San Bernardino Counties.

The average number of tourism-related jobs in Orange County in 2002 (79,670) increased slightly since 2001. Orange County remains the 3rd largest center in the state for tourism-related employment, behind Los Angeles and San Diego Counties. Amusement parks such as Disneyland and Knott's Berry Farm, and the county's 42 miles of beaches continue to be among the most popular tourist destinations in California.

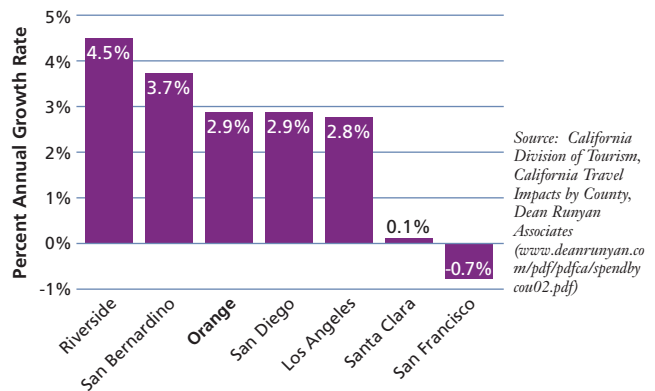
Average Expenditures per Visitor per Day
County Comparison, 2000-2003



Note: Excludes transportation expenditures.

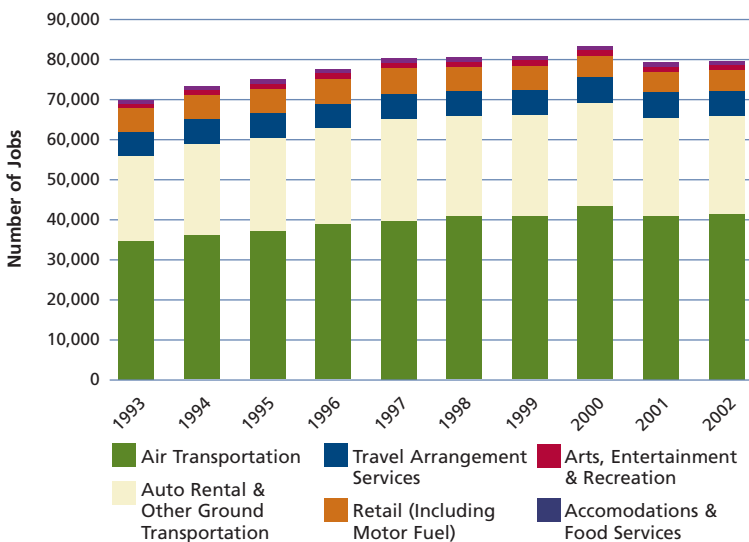
Source: D.K. Shifflet and Associates for the California Division of Tourism, California 2003 Domestic Travel Report (www.visitcalifornia.com/tourism/pdfs/TI_RS_Dom_Travel_Data_Report_2003.pdf)

Visitor Spending by County
Average Annual Growth Rate, 1998-2002



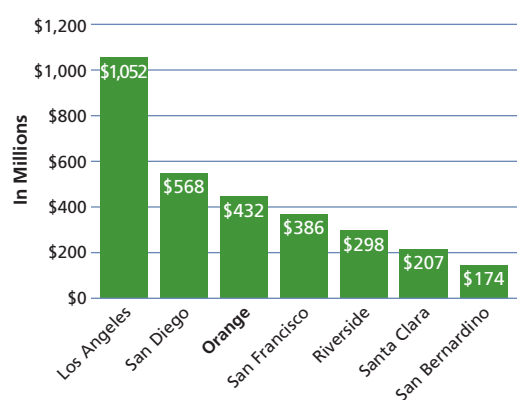
Source: California Division of Tourism, California Travel Impacts by County, Dean Runyan Associates (www.deanrunyan.com/pdf/pdfca/spendby/cou02.pdf)

Tourism-Related Employment by Industry
Orange County, 1993-2002



Source: California Division of Tourism, California Travel Impacts by County, Dean Runyan Associates (<http://dra.uia.net/index.phtml?state=CA>)

Tourism-Related Total Tax Receipts, 2002



Source: California Division of Tourism, California Travel Impacts by County, Dean Runyan Associates (www.deanrunyan.com/pdf/pdfca/impbycou02.pdf)

Exports Rebound in 2003

Description of Indicator

This indicator measures the trend in total and manufacturing exports for Orange County companies and identifies the county's top export markets.

Why is it Important?

As trade agreements continue to increase free trade opportunities and competition, Orange County companies must be able to access foreign markets. Due to the county's strong Latino community and proximity to Mexico, Orange County is well positioned to take advantage of growing markets in Latin America, as well as more traditional export markets in Europe and Asia.

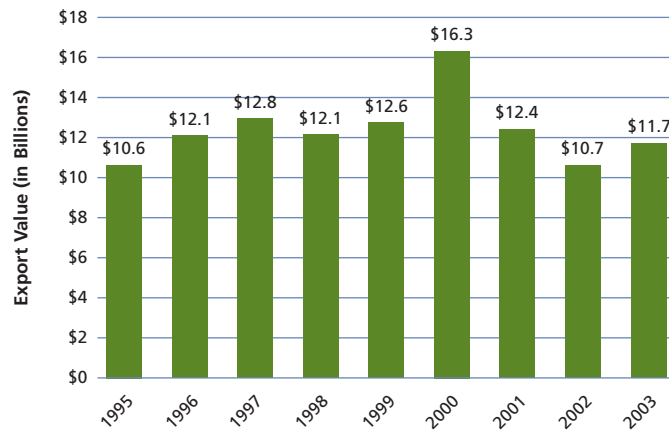
How is Orange County Doing?

Total exports (comprised of manufacturing and service exports) in 2003 increased to \$11.7 billion from \$10.7 billion in 2002. Manufacturing, the largest component of total exports, increased to \$8.95 billion. The top export goods from Orange County were computers and electronics with \$4.7 billion worth of trade.

In 2003, Mexico was the top destination for all Orange County exports (manufacturing and services), with Taiwan and Japan the next most important markets. This reflects the impressive growth of the North American Free Trade Agreement (NAFTA) countries as markets for Orange County firms. NAFTA countries accounted for 23.5% of Orange County manufacturing exports a decade ago; by 2003, 30% of the county's manufacturing exports were destined for NAFTA countries. For Orange County companies in leading high-tech sectors, the top markets in 2004 include a majority of European and English-speaking countries. China and Japan also have a strong showing in the high-tech sectors.

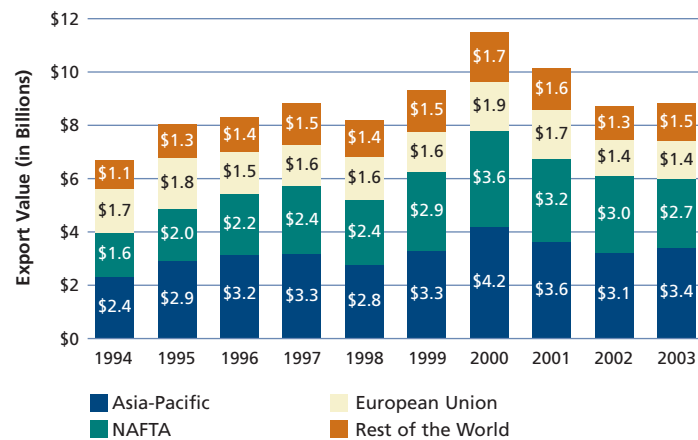
The top items outsourced to other countries by Orange County companies are software development (60%), assembly (20%), and electronic component manufacturing (10%). The countries that Orange County companies are outsourcing to are Singapore, China, India, Taiwan, Hong Kong, Malaysia, the Philippines and Japan.

Total Orange County Exports Worldwide, 1995-2003

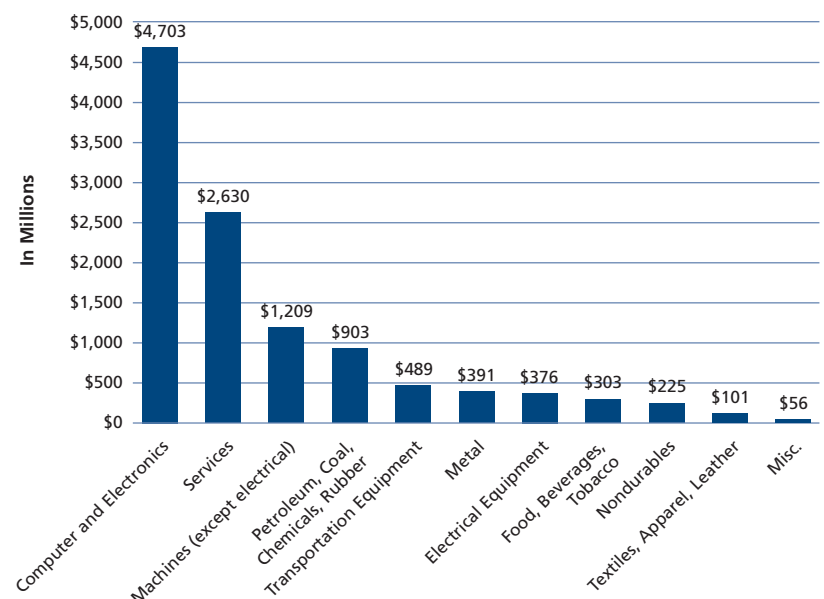


Source: California State University, Fullerton, Center for Economic and Environmental Studies

Orange County Manufacturing Export Value by Destination 1994-2003



Exports From Orange County by Sector, 2003



Source: California State University, Fullerton, Center for Emerging Markets

Consumer Confidence Down Slightly in 2004

Description of Indicator

This indicator uses the Consumer Confidence Index (CCI), a five-question survey conducted nationally by the University of Michigan and locally by the Public Policy Institute of California and the University of California, Irvine, to measure the confidence that consumers have in their present and future personal income situations.

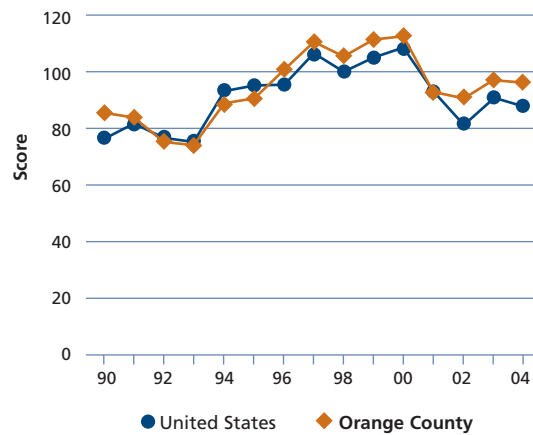
Why is it Important?

A high CCI indicates that consumers feel optimistic about the state of the economy and their economic wellbeing. It measures the willingness of Orange County consumers to make major purchases such as a new home or a new automobile, invest in business endeavors, or take a risk with their career such as starting a new business or pursuing additional education.

How is Orange County Doing?

In 2004, the CCI score in Orange County was 96, down from 97 in 2003, but up from 90 in 2002. However, it is still below the record high score of 112 in 2000. According to the University of Michigan, the nationwide CCI score in 2004 was 88, down from 90 in 2003 but up from 81 in 2002. For the national index, a score of 100 is considered very good, and a score of 85 is the average for the 50-year history of the national survey.

Consumer Confidence, 1990-2004



Sources: University of Michigan; Orange County Annual Survey (prior to 2001); and Public Policy Institute of California Statewide Survey, Special Survey of Orange County, in collaboration with University of California, Irvine (2001-2004)

Income Growth Rebounds

Description of Indicator

This indicator measures per capita income levels and income growth. Total personal income includes wages and salaries, proprietor income, property income and transfer payments, such as pensions and unemployment insurance. Figures are not adjusted for inflation.

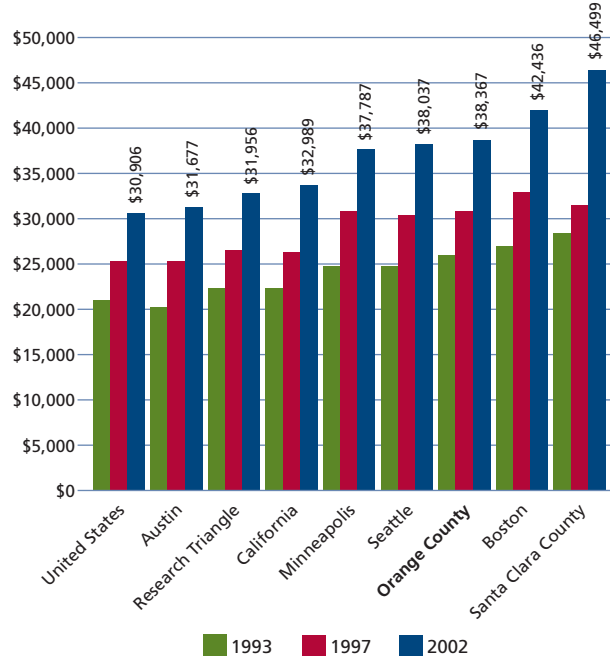
Why is it Important?

Higher disposable incomes result in additional purchases of goods and services which contribute to overall economic strength and a sense of material satisfaction as residents have what they need to survive and prosper.

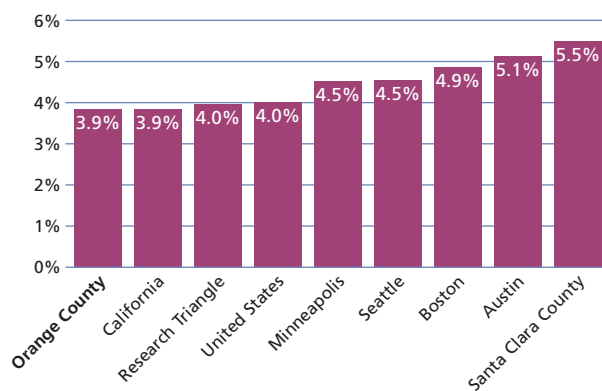
How is Orange County Doing?

In 2002, Orange County's per capita income of \$38,367 was higher than the California and United States averages. When compared to economic peers it was higher than all except for Boston and Santa Clara County. Between 2001 and 2002, Orange County witnessed the fastest income growth rate among peers (1.7%) while many regions experienced losses in that period. Orange County's rebounding growth rate helped close some of the gap between regions, but it was not significant enough to allow it to rise above the bottom rank among peers for average annual percent change for the past 10 years.

Per Capita Income, 1993, 1997, and 2002



Per Capita Income Average Annual Percent Change, 1993-2002



Source: U.S. Bureau of Economic Analysis (www.bea.doc.gov)

Job Growth Primarily in Service Clusters and Construction

Description of Indicator

This indicator shows employment and salaries in 10 major Orange County industry clusters. The clusters were chosen to reflect the diversity of Orange County employment, major economic drivers within the county, and important industry sectors for workforce development.¹

Why is it Important?

Employment change within specific clusters illuminates how Orange County's economy is evolving. Approximately 40% of all Orange County jobs are in the 10 clusters described in this indicator. Tracking salary levels in these clusters shows whether they can provide a wage high enough for workers to afford living in Orange County.

How is Orange County Doing?

The three largest clusters – Business and Professional Services, Tourism, and Health Services – reflect the importance of the service sector in the Orange County economy. These three large clusters posted solid employment growth during the 1990s with an average annual growth rate of 1.8%, 3.2%, and 1.1%, respectively. The large reductions in Defense and Aerospace employment seen during the 1990s were more than counterbalanced by strong growth in Computer Software (186%) and Communications (84%).

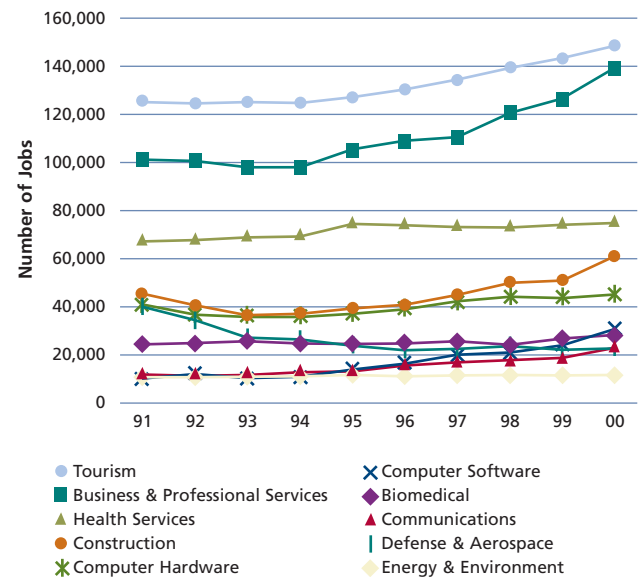
The technology downturn since 2001 has hit technology sectors hard. Between 2002 and 2003, these sectors observed job losses: Biomedical (-3.2%), Computer Hardware (-23.2%), Communications (-10.9%), Computer Software (-1.6%), Energy and Environment (-16.4%), and Defense and Aerospace (-43.1%). These losses have been offset somewhat by job growth in some of the largest clusters: Business and Professional Services (+1.6%), Health Services (+4.9%) and Construction (+5.8%). These were the only clusters to show job growth in the last year, concentrating job growth in some of the lower paying of the 10 industry clusters. Salaries grew from 2002 to 2003 in all clusters except Defense and Aerospace.

Average Annual Salaries in Orange County Clusters, 2003

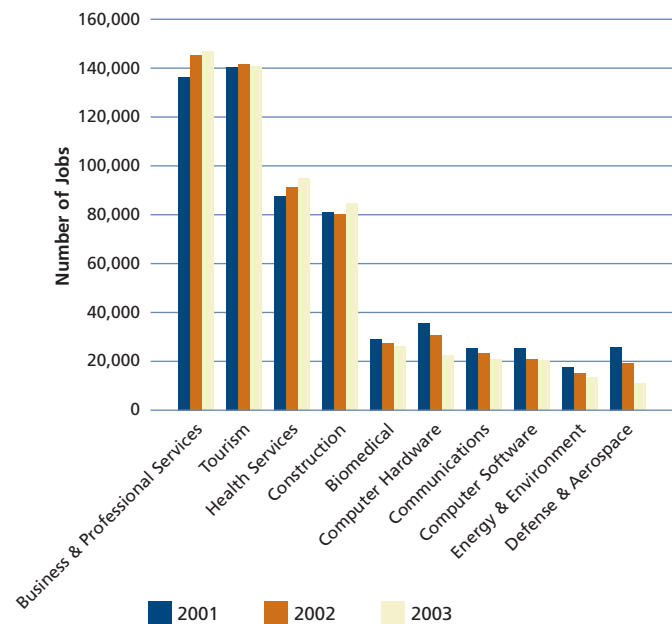
	2003	Change 2002-03
Computer Software	\$78,339	2.6%
Computer Hardware	\$59,530	4.9%
Biomedical	\$59,463	5.0%
Defense & Aerospace	\$59,259	-5.5%
Communications	\$58,590	3.3%
Energy & Environment	\$47,148	6.4%
Construction	\$47,038	4.3%
Business & Professional Services	\$45,071	2.8%
Health Services	\$42,511	1.9%
Tourism	\$17,651	1.0%

Source: Orange County Business Council analysis of data from the California Employment Development Department

Employment in Selected Clusters
Orange County, 1991-2000



Employment in Selected Clusters
Orange County, 2001-2003



Source: Orange County Business Council analysis of data from the California Employment Development Department

¹ Through 2000, the California Employment Development Department (EDD) utilized the Standard Industrial Classification system (SIC). For 2001 and later years, the EDD uses the North American Industrial Classification System (NAICS). Because the NAICS includes many changes in industry classification that are intended to improve upon the SIC system, the 1991-2000 and 2001-2003 data series cannot be directly compared and are shown separately.

Job Growth Outpaces Housing Construction

Description of Indicator

This indicator shows the ratio of new housing permits divided by new jobs for Orange County, comparison metropolitan areas, California, and the United States.

Why is it Important?

When an economy is growing, new housing must be created for the additional workers employed. The inability to meet housing demand has the potential to make housing unaffordable to workers by driving up housing prices and apartment rents, making it more difficult for employers to attract and retain workers, and forcing more employees to make longer commutes. When an economy contracts, the need for new housing is less pronounced but does not vanish, as existing residents will desire move up homes. Also, housing permit growth during economic contraction can help a region reduce excess demand that could have been created during periods when housing construction did not keep pace with economic growth.

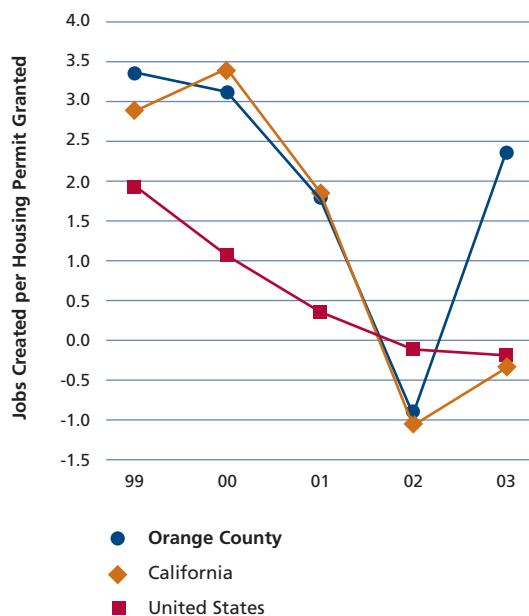
How is Orange County Doing?

In 2003, Orange County had 9,248 new housing permits and 21,800 new jobs creating a relatively high 2.36 new jobs for every new housing permit. This ratio of housing permits to new jobs is the highest of the peer metro areas analyzed and higher than both California and the United States.

During the late 1990s, Orange County created as many as 4.4 jobs for every housing permit granted, implying that in those years the county's housing construction was not keeping pace with demand. By 2002, employment shrank by 10,700 jobs while housing permits remained positive at 11,370, yielding a negative 0.94 ratio of new jobs to permits. The 2003 numbers show an employment rebound and fewer housing permits.

While the job growth is not huge, the low number of housing permits for the county creates an imbalanced employment to housing ratio that suggests longer travel times for commuters taking these new jobs in the county. The decrease of housing permits in 2003 also contributes to the county's rapid increase in house prices (see the Housing Affordability indicator).

New Jobs Created per Housing Permit Granted, 1999-2003



Sources: Meyers Group and United States Bureau of Labor Statistics

Housing Demand Measures, 2003

	Housing Permits	Employment Change (Jobs)	Ratio Employment Change to Permits
Orange County	9,248	21,800	2.36
San Diego	18,031	11,200	0.62
Inland Empire	42,252	24,000	0.57
Phoenix	54,860	20,600	0.38
Minneapolis	27,623	1,100	0.04
Research Triangle	17,517	-2,000	-0.11
Atlanta	64,800	-9,900	-0.15
United States	1,889,214	-439,900	-0.23
California	104,092	-37,400	-0.36
Austin	15,330	-6,100	-0.40
Seattle	24,948	-13,400	-0.54
Los Angeles	20,903	-36,700	-1.76
Boston	20,542	-49,300	-2.40
San Francisco Bay Area	28,401	-98,000	-3.45

Only 11% of Residents Can Afford to Buy Median Priced Home

Description of Indicator

This indicator measures the value and change in value of the median priced single-family detached home, calculates the income needed to afford the median priced single- or multi-family home compared to typical salaries, and examines the Housing Affordability Index which measures the percentage of Orange County households that can afford the median priced single- or multi-family home in the county.

Why is it Important?

A lack of affordable housing can be a barrier to a strong, reliable economy. High relative housing prices may influence location decisions of corporations. A shortage of affordable housing (particularly for first-time buyers) may discourage young families from moving to Orange County or staying here after graduating from local colleges and universities, and can push Orange County workers to settle outside the county, resulting in longer commutes, increased traffic congestion and pollution, decreased productivity, and diminished quality of life. Finally, home ownership can be a significant means of personal wealth creation.

How is Orange County Doing?

Single-family Home Sale Price

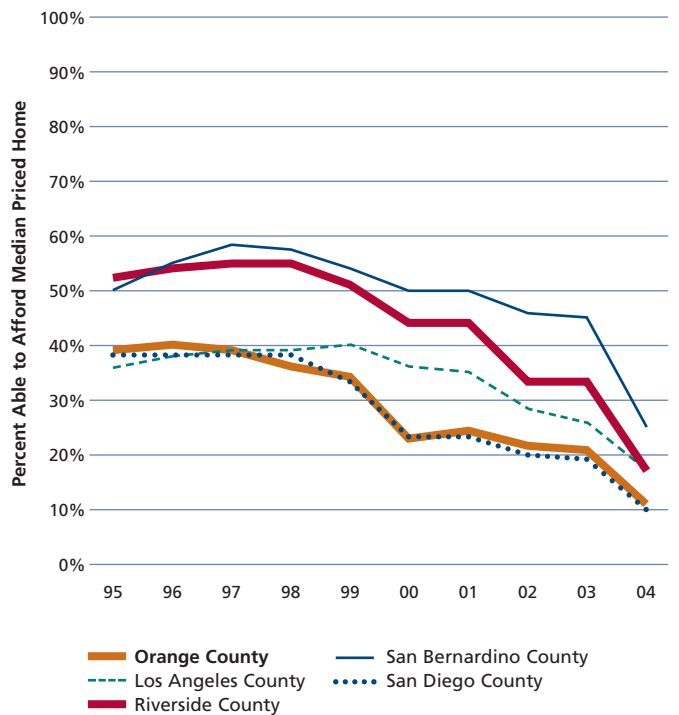
According to the California Association of Realtors, in July 2004, the median sale price of a single-family detached home in Orange County was \$648,590 (an increase of 30.7% from July 2003) and \$463,540 in California (a 21.4% increase). For most of the past several years, high housing prices have been maintained through historically low interest rates and high housing demand relative to available supply. During the summer of 2004, price increases began to level off, perhaps due to interest rate increases. After multiple years of double digit increases in prices, this leveling may be a sign that the market is cooling off.

Housing Affordability

In July 2004, only 11% of households in Orange County could afford the median-priced home. This compares to 21% of Orange County households who could afford the median priced home in 2003 and 39% in 1995. According to the Housing Affordability Index, Orange County is less affordable than all our neighbors except San Diego County.

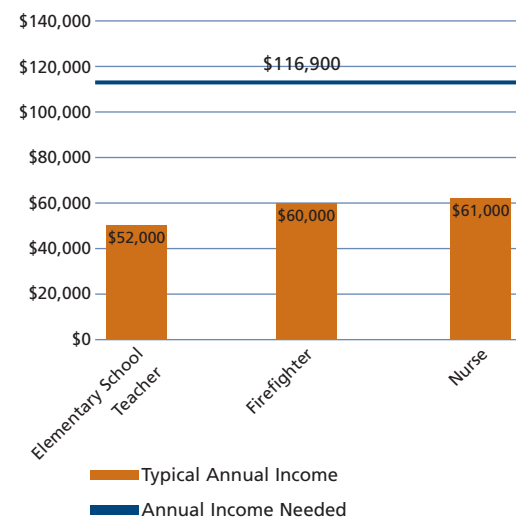
The minimum household income needed to purchase a median-priced single- or multi-family home at \$463,540 in California in July was \$109,590, based on an average effective mortgage interest rate of 5.93% and assuming a 20% down payment. A median-priced Orange County home for approximately \$33,000 more would demand an income of approximately \$116,900. The approximate annual income in Orange County for a nurse is \$61,000, a firefighter is \$60,000, and an elementary school teacher is \$52,000.

Housing Affordability Index, 1995-2004



Source: California Association of Realtors

Income Needed to Afford Median Priced Home (\$496,540) Compared to Typical Salaries Orange County, 2004



Sources: Orange County Business Council analysis of California Association of Realtors data, and California Employment Development Department

County is One of the Least Affordable Locations for Renters

Description of Indicator

The rental affordability indicator measures the Housing Wage – the hourly wage a resident would need to afford Fair Market Rent. For Orange County, Fair Market Rent is the 50th percentile (or median) rent in the market.

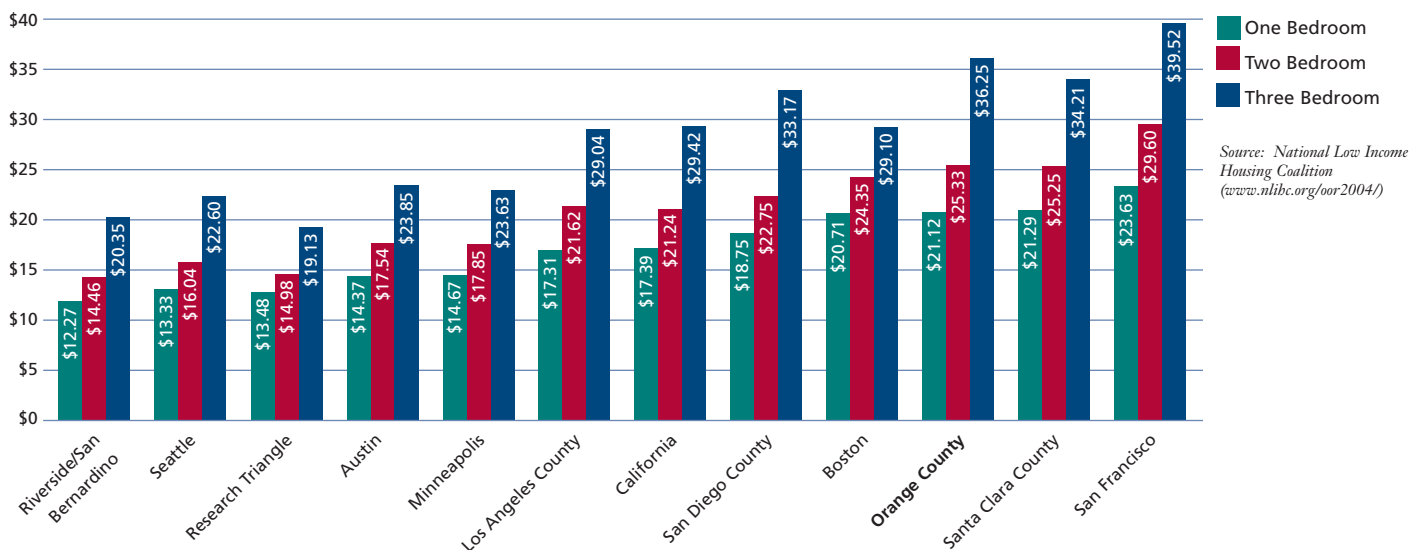
Why is it Important?

Lack of affordable rental housing can lead to crowding and household stress. Less affordable rental housing also restricts the ability of renters to save for a down payment on a home, limiting their ability to eventually become homeowners and build personal wealth through housing appreciation. Ultimately, a shortage of affordable housing for renters can instigate a cycle of poverty.

How is Orange County Doing?

Orange County's Housing Wage rates increased in 2004. The hourly wage needed to rent a one-bedroom apartment (\$21.12) is equivalent to an annual income of \$43,930. According to employment projections, most of the occupations likely to have the large gains in the county's three high-growth industries have hourly wages far below the Housing Wage. Even among the higher wage growth occupations, wages are not enough to afford a median priced home in the county (see Housing Affordability, page 20). According to the California Employment Development Department and National Low Income Housing Coalition, the typical hourly wage in Orange County in 2004 for a janitor was \$8.64; for a retail sales person was \$9.18; and for a factory worker was \$10.87. Among state and national peer metropolitan areas, only Santa Clara County and San Francisco have higher Housing Wages (less affordable rental housing) than Orange County for one-bedroom housing and only San Francisco is higher for two- and three-bedroom housing.

Hourly Wage Needed to Afford Fair Market Rent, 2004

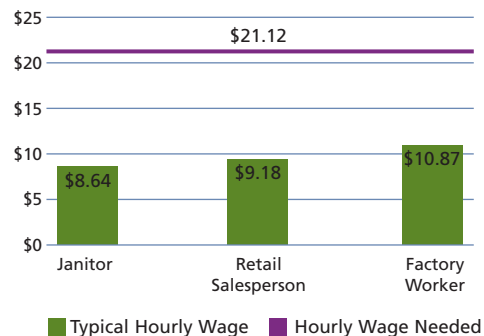


Renting in Orange County

Fair Market Rent (Monthly)	2004	2005
One Bedroom	\$ 987	\$1,098
Two Bedroom	\$1,220	\$1,317
Three Bedroom	\$1,698	\$1,885
	2003	2004
Estimated Orange County Median Family Income (Annual)	\$70,000	\$74,200
Amount a Household Earning Minimum Wage Can Afford to Pay in Rent (Monthly)	\$351	\$351
Amount a Household Earning 30% of Median Family Income Can Afford to Pay in Rent (Monthly)	\$525	\$557
Number of Hours per Week a Minimum Wage Earner Must Work to Afford a One-Bedroom Apartment	112	125

Source: National Low Income Housing Coalition (www.nlihc.org/oor2004/)

Hourly Wage Needed to Afford a One-Bedroom Unit Compared to Typical Hourly Wages Orange County, 2004



Sources: California Employment Development Department (www.calmis.ca.gov/FILE/OCCUPS/oeswages/OranSoes.htm) and National Low Income Housing Coalition (www.nlihc.org/oor2004/)

Average Commute Time Holds Steady; Commuter Rail Continues Growth Trend

Description of Indicator

This indicator includes several transportation-related measures including freeway congestion, average commute times, bus and rail use, transit system expenditures, mode of travel, and local transportation funding.

Why is it Important?

The ability of residents, workers, and goods to move within the county is integral to Orange County's quality of life and economic prosperity. Long commutes affect personal lives and worker productivity due to the time lost in transit. Traffic congestion affects the efficient movement of goods. An effective public transit system offers an important alternative for individuals who do not own or do not wish to drive a car. Measuring the use of existing facilities and investment in transportation infrastructure will help the community determine how to address future mobility needs.

How is Orange County Doing?

Travel Growth

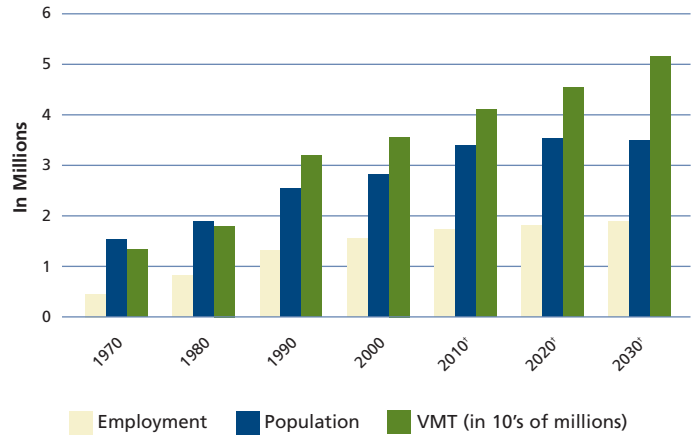
The total number of vehicle miles traveled (VMT) in Orange County has been steadily increasing along with our population and employment growth. While population and employment growth are projected to slow and begin to flatten, VMT is projected to continue its steady increase - a trend that is likely to lead to increased traffic congestion.

Use of Orange County's Freeways

The California Department of Transportation (Caltrans) tracks congestion levels on Orange County freeways in the morning and evening peak rush hours. Congestion is worse in the evening than the morning rush hours. In fall 2001, there were more than three hours of congestion during the evening commute on a majority of Orange County's freeways including segments of the Interstate (I) 605, I-405, I-5, State Route (SR) 55, SR-22, SR-57 and SR-91.

Caltrans also tracks the available miles of state highways and the total number of vehicle miles traveled (VMT) per year by county. A comparison of VMT per lane mile of state highways indicates the utilization of the highway. A greater number of VMT per highway mile suggests greater congestion on the system, as well as more wear and tear on the roadways and therefore, higher maintenance and preservation costs. Compared to peers, in 2002 Orange County had the greatest level of state highway utilization of all areas compared including Los Angeles, Santa Clara and San Diego Counties. This is due in part to the configuration of the Orange County freeway system on a diagonal rather than grid system, resulting in a lack of parallel frontage roads or alternate routes.

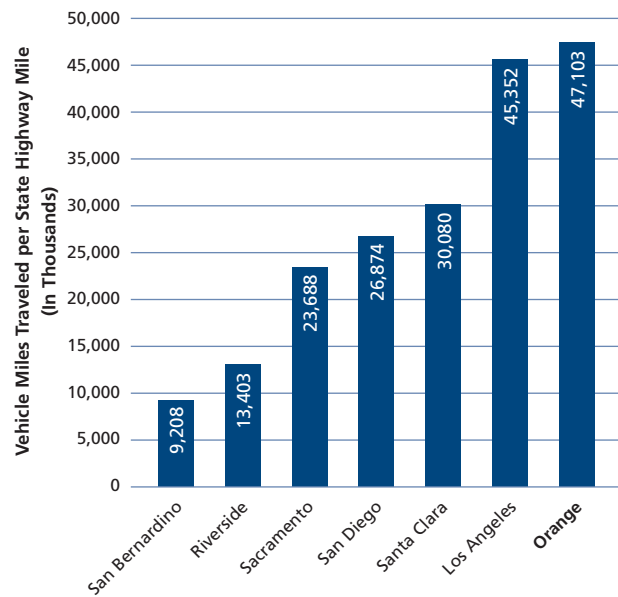
Population, Employment, and Vehicle Miles Traveled
Orange County, 1970-2030



† Projection

Sources: Center for Demographic Research, California State University, Fullerton, Orange County Progress Report 2004, Assembly of Statistical Report, California Public Road Data 2000 and Orange County Transportation Authority

State Highway Utilization
County Comparison, 2002

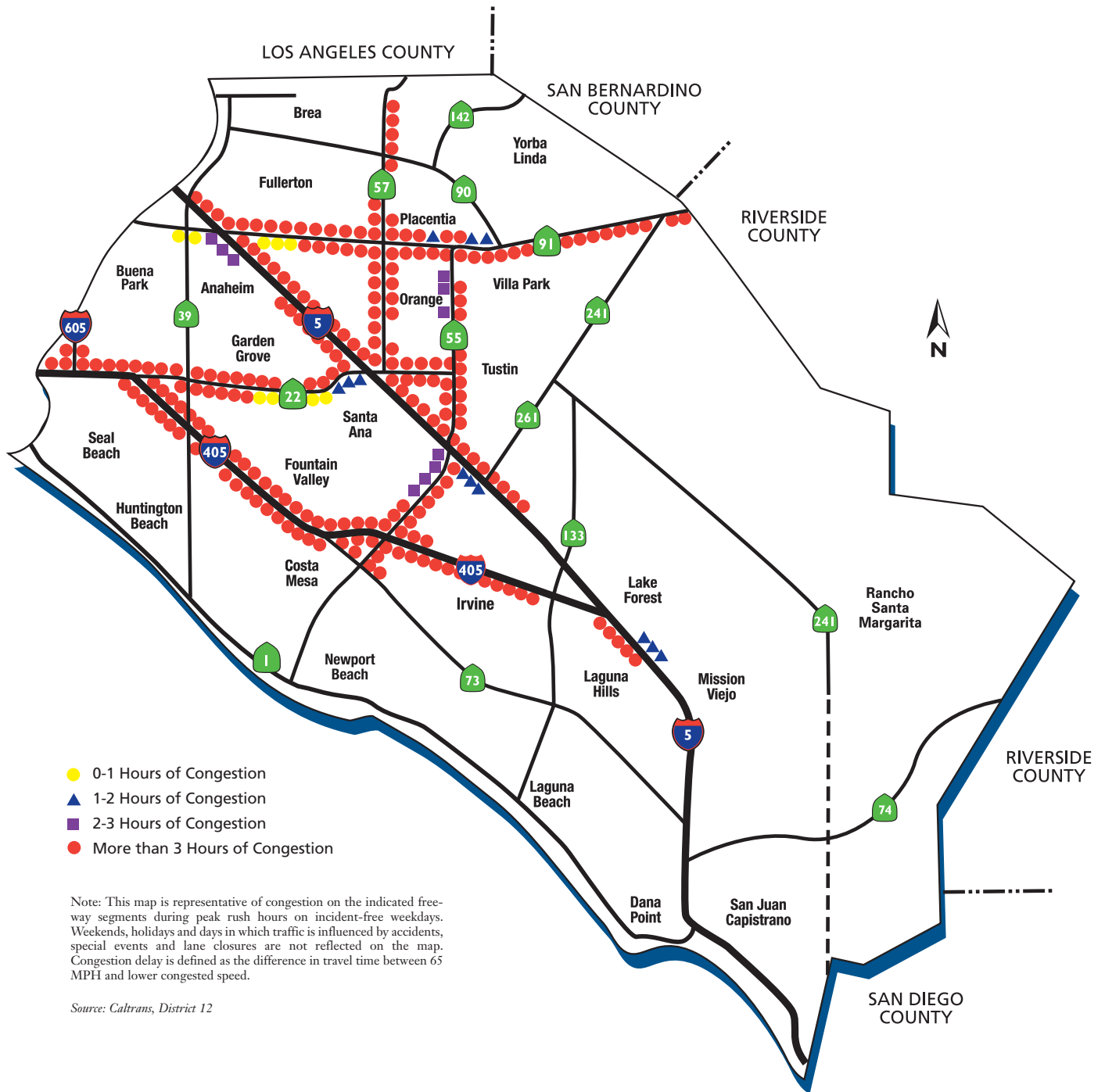


Source: Caltrans, 2002 Collision Data on California State Highways

Vehicle Miles Traveled and Lane Miles Defined

Vehicle miles traveled (VMT) measures the total number of miles traveled by automobiles on Orange County roads. A "lane mile" is one mile of a single lane of roadway (if two lanes are added to a mile stretch of road it would be considered two lane miles).

Congestion on Orange County Freeways
PM Peak Hours, Fall 2001



Average Commute Times

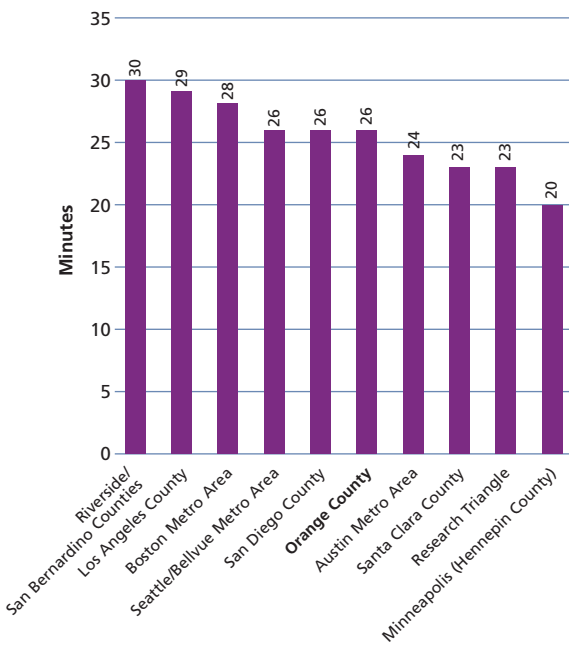
In 2003, the average commute time to work in Orange County was 26 minutes (unchanged from 2001 and 2002), the same as San Diego and Seattle. This places Orange County in the middle of the comparison regions, with Riverside and San Bernardino County commuters spending the longest time commuting to work (30 minutes) and Minneapolis commuters spending the least (20 minutes).

Transit Performance

Orange County Transportation Authority (OCTA) bus passenger boardings in 2003/04 totaled 67,551,874. After a jump in 2001/02 to 22 boardings per capita, and remaining level in 2002/03, the rate increased to 23 boardings per capita in 2003/04. Comparing Orange County to peer metropolitan areas, Orange County's system operating costs per boarding and system expenditures per capita are among the lower range of costs for peer metropolitan areas, indicating that Orange County has a low-cost and efficient bus system. Despite the increase in recent years, Orange County's bus ridership is lower per capita than all peer areas except Riverside County and San Bernardino County.

Ridership on the three commuter rail lines that serve Orange County continues to increase with over 3,000,000 riders on all lines in 2003/04. The Orange County line which runs between Oceanside and downtown Los Angeles grew to approximately 1.71 million riders in 2003/04 and the Inland Empire Line, running between San Bernardino and San Juan Capistrano, grew to 913, 528 riders.¹ In May of 2002, Metrolink began service on a new 91 line, which links downtown Riverside, Fullerton, and downtown Los Angeles. This line, which parallels the congested State Route 91, increased nine-fold in its first year of operation from 41,940 (May and June of 2002) to 391,078 in 2002/03. The upward trend in ridership on the 91 line continues with 428,572 passengers in 2003/04.

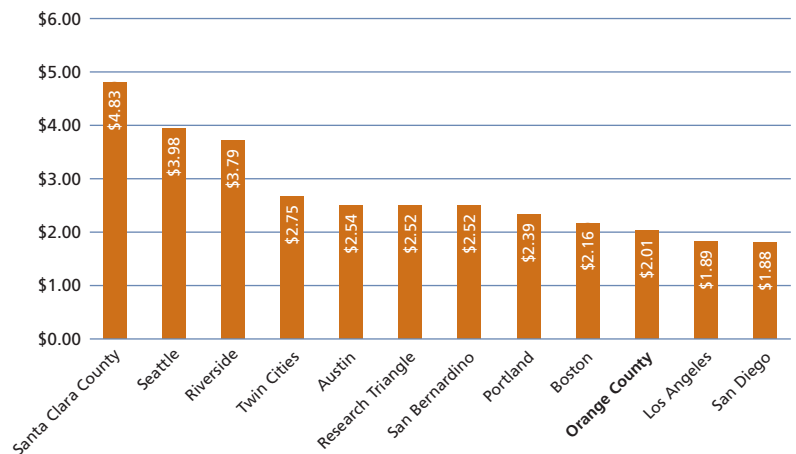
Average Commute Times to Work in Minutes
Regional Comparison, 2003



Source: U.S. Census Bureau, 2003 American Community Survey (www.census.gov/acs/www/index.html)

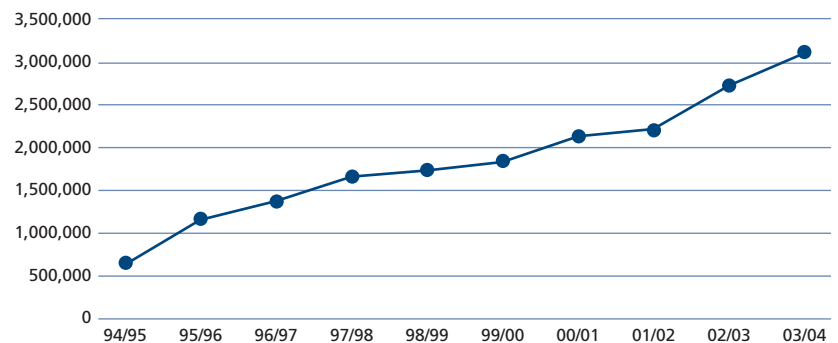
¹ In 2002/03 OCTA began "Rail to Rail," a program that allows Metrolink monthly pass holders to ride Amtrak for free. Amtrak provides similar service to the Orange County line, and the count of 1.71 million riders includes Metrolink riders on Amtrak's trains.

Bus System Operating Costs per Boarding, 2002



Source: Federal Transit Administration, National Transit Database, 2002 (www.ntdprogram.com)

Number of Commuter Rail Riders
Orange County Line, Inland Empire/Orange County Line and 91 Line, 1995-2004

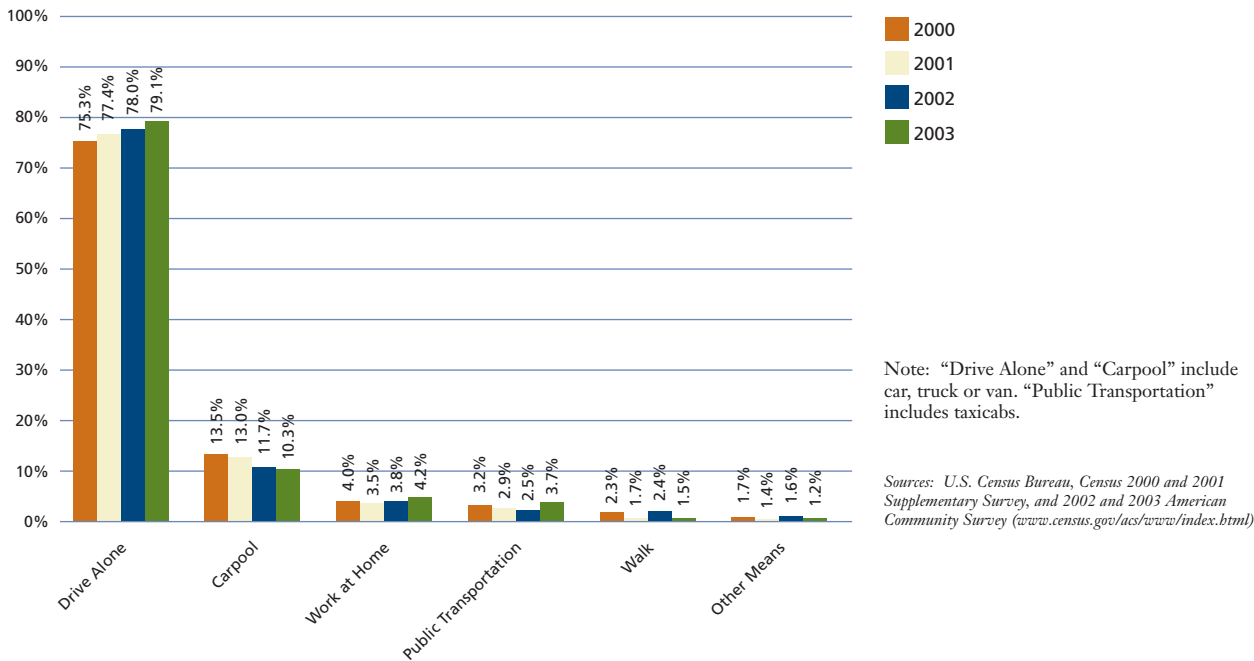


Source: Orange County Transportation Authority

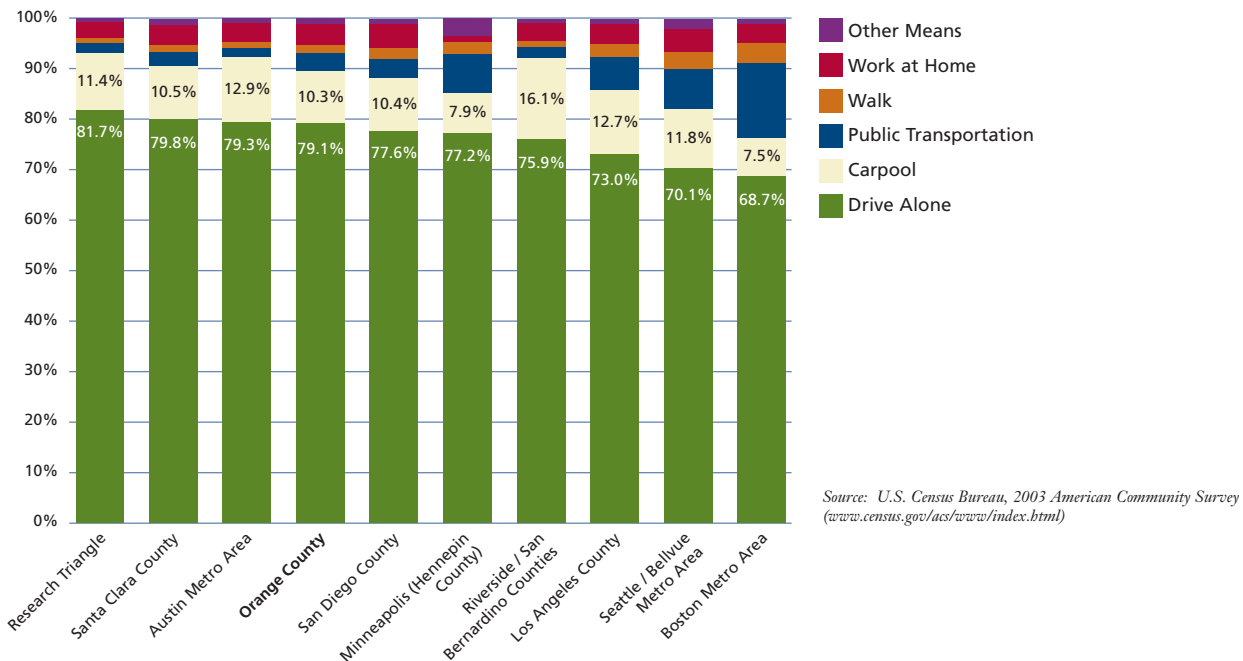
Alternative Modes of Travel

The percentage of Orange County residents driving alone has been inching up since 2000, while the percentage of commuters using carpools or riding transit has been decreasing. Public transit increased in 2003. However, the changes from 2001 to 2003 for all modes were in the statistical error range thus do not show significant trends. In 2003, 79% of Orange County commuters drove alone, lower than commuters in Research Triangle, Santa Clara County and Austin, but higher than commuters in San Diego County, Minneapolis, Riverside-San Bernardino Counties, Los Angeles County, Seattle, and Boston. Among the comparison regions, in 2003 Orange County had the 5th lowest proportion of commuters using public transportation, but had the 3rd highest proportion of commuters working from home.

Primary Mode of Travel to Work Orange County, 2000-2003



Primary Mode of Commuting to Work Regional Comparison, 2003

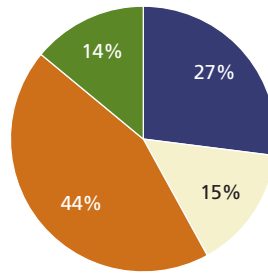


Transportation Funds

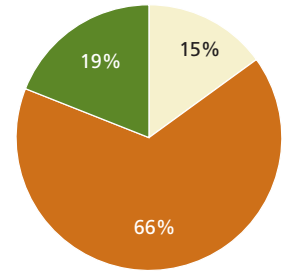
Orange County receives funds for transportation improvements from a variety of sources including flexible regional funds, dedicated regional funds, local sources, and Measure M.² Dedicated regional funds and local sources are generally earmarked for specific uses, while flexible regional funds can be directed to projects based on need and Measure M funds are to be used on specific projects identified when the Measure M program was passed.

The passage of Measure M provided additional dollars for transportation totaling \$3.1 billion (1988 dollars) which are “over and above” what could be funded with traditional transportation revenue sources. Measure M sunsets in 2011, which will result in a significant loss of locally prioritized revenues for Orange County transportation improvements. In addition to the loss of overall transportation dollars, the available funds become more constrained with respect to use. In 2006, dedicated regional and local source funds will comprise about 59% of total Orange County transportation funding, compared with 81% projected for 2012 and beyond. Given this situation, consideration is growing to place a new measure on the ballot to renew Measure M funding. In December 2004, the Orange County Transportation Authority Board of Directors directed staff to prepare a work plan for a new long-range transportation spending plan for Orange County that includes the potential extension of the Measure M one-half cent sales tax. Before such a measure could be placed on the ballot, a new expenditure plan and tax ordinance must be developed, and the Board of Supervisors must call for an election. Passage of a new or extended sales tax for transportation purposes requires a two-thirds majority vote.

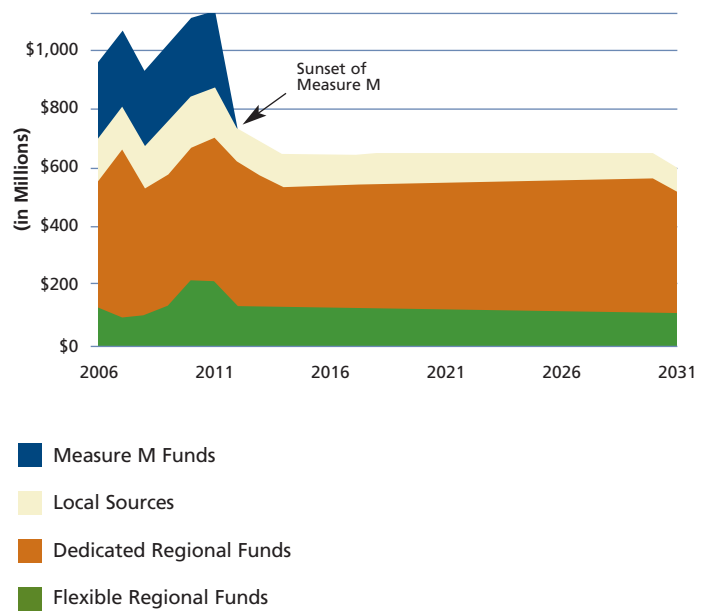
Transportation Revenues Orange County 2006†



2012†



Total Transportation Revenues Projected for Orange County 2006-2031

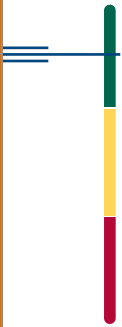


† Projected

Source: Orange County Transportation Authority

² Flexible regional funds include state Transportation Improvement Program funds, federal Regional Surface Transportation Program funds and federal Congestion Mitigation and Air Quality funds. Dedicated regional funds are comprised of multiple sources such as transit fares, federal bus transit funds and revenues from the State Route 91 toll road. The primary source of local funds is the state gas tax. Measure M is a one-half cent sales tax for transportation improvements, which was approved by Orange County voters in 1991.

Technology and Innovation



Orange County has the **most diversified** high-tech economy in Southern California. With an increase in number of patents granted, an increase in computer and Internet access in K-12 schools, and an increase in undergraduate technical degrees, most technology **indicators** are **positive**. Orange County's access to venture capital continues to lag behind our peers.

Orange County has the Most Diversified High-Tech Economy in Southern California

Description of Indicator

This indicator measures how diversified our high-tech economy is relative to other metropolitan areas in the country. The indicator uses the concept of location quotient. A location quotient measures whether a region's employment in an industry is more or less concentrated than national employment in the same industry. The indicator counts the number of technology sectors for which employment is more concentrated at the local level than at a national level. A diversified technology sector will include concentrations in many high-tech employment clusters, so larger numbers for the indicator show a more diversified technology employment base.¹

Why is it Important?

High-technology industries provide strong economic growth potential, better than average salaries, and opportunities for significant profit. Gaining a broad representation of high-tech industries in Orange County will ensure future economic prosperity for the region as these industries attract talent, finances and firms. Diversity in the local high-tech base is important because it helps insulate Orange County's economy from unanticipated downturns in any particular industry segment. Too much reliance on any particular industry segment may exacerbate economic recessions.

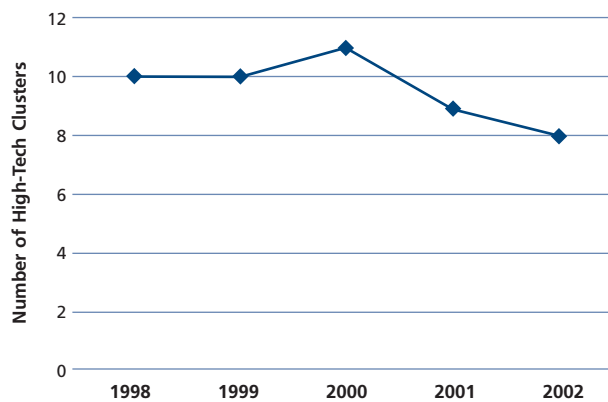
How is Orange County Doing?

In 2003, Orange County had 15 industries with a greater concentration of employment than the national average, compared with Boulder, Colorado which is the national leader at 18 concentrated industries.

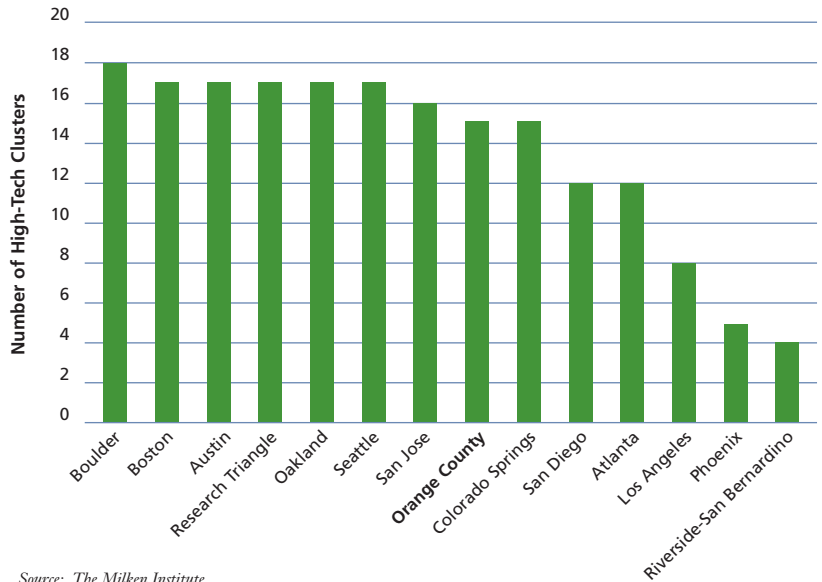
Since 1998 (when tracking for this indicator began), Orange County has consistently been one of the most diverse high-tech economies in the United States. In 2003, Orange County was the most diversified economy in Southern California even though it trailed outside regions such as Boulder, Boston, Austin, Research Triangle, Oakland, Seattle, and San Jose. In Southern California, San Diego has 12 concentrated high-tech industries, Los Angeles has eight and Riverside-San Bernardino has four.

The diversity of the county's high-tech economy has shielded the county from the more serious impacts of the recent slowdown in technology. The county's diverse technology base also provides a strong foundation on which to build future high-tech business growth.

High-Tech Cluster Diversification
Orange County, 1998-2002



High-Tech Cluster Diversification
Metro Area Comparison, 2003



Source: The Milken Institute

¹ In 2003, the number of high-tech industries measured was changed from 14 to 25. This was due to a change in the method of defining industries from the SIC (Standard Industrial Code) to the NAICS (North American Industrial Code System). As a result, 2003 data is shown separately from 1998-2002 data.

County Remains a Leader in Internet Access but is Declining

Description of Indicator

This indicator measures the percentage of adults who have access to the Internet either at home or work.

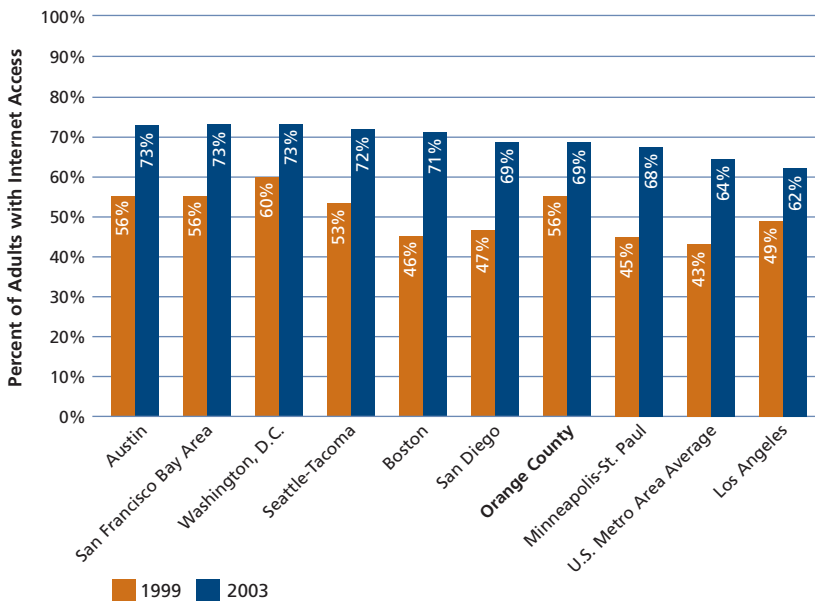
Why is it Important?

The Internet is rapidly becoming a mainstream media with far-reaching impacts on every aspect of our lives. On a community level, the Internet encourages the interaction of a variety of demographic, cultural, retail, social, business, and media groups. On an economic level, the explosive growth of the Internet is affecting not only high-tech firms, but changing the way a broad range of firms conduct business and commerce in general. The level of Internet access among Orange County residents measures how the county's population compares to other urban areas in accessing and using this technology.

How is Orange County Doing?

Orange County's Internet access rate for adults is among the national leaders, but declined slightly in 2003 to 69%. Internet usage among adults in Orange County rose substantially from 1999 to 2002, from 56% of the county's adults having access in 1999 to 70% in 2002. Among peer metropolitan areas, Orange County's Internet penetration rate is on par with other national leaders and approximately 5% higher than the national average of 64% (across 75 large metropolitan areas).

Internet Access Among Adults, 1999 and 2003



Source: Scarborough Research

Patents Increase; Venture Capital Continues to Lag Peers

Description of Indicator

This indicator measures access to venture capital - financing for early stage companies - by looking at metropolitan area investments and the number of patent grants awarded to inventors.

Why is it Important?

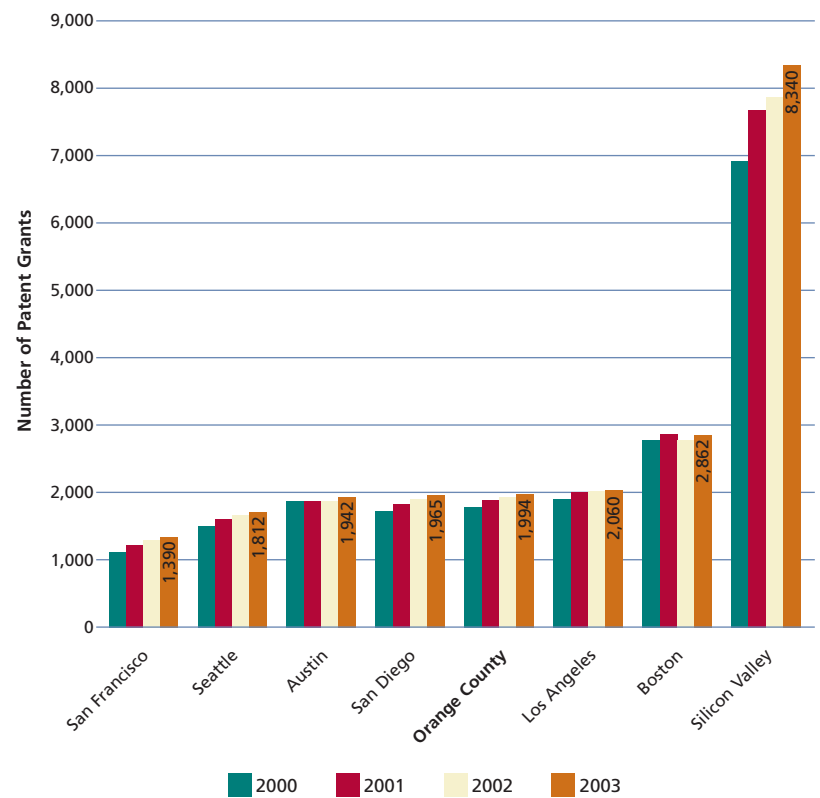
The development of technological potential, human resources and innovative capacity is critical for a regional economy's long-term viability. Venture capital facilitates the growth of new entrepreneurial companies and the adoption of new technologies. Patent grants demonstrate the ability of residents to invent new technologies.

How is Orange County Doing?

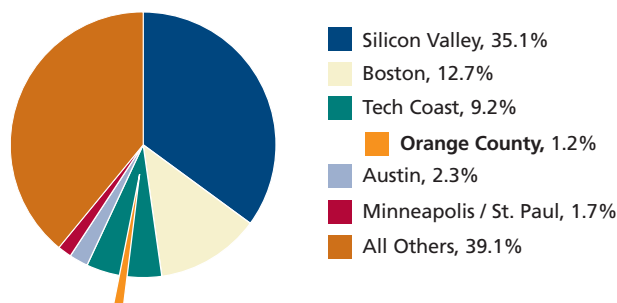
Orange County trails our peer regions significantly in venture capital. Nationally, venture capital investments in 2004 were smaller than in any year since 1997. Venture capital in Orange County rose to \$1.5 billion in 2000 and then fell to \$138.6 million for the first half of 2004, behind all peers compared including San Diego (\$526 million), Los Angeles (\$311 million), Austin (\$243 million), and Minneapolis/St. Paul (\$177 million). While the county's share of national venture capital is only about 1.2%, the larger Tech Coast region (Orange, Los Angeles, and San Diego Counties) received 9.2% of all national venture capital dollars in the first half of 2004, placing the broader region slightly behind Boston for the third leading source of venture capital funding. This suggests that venture capital opportunities exist in Southern California, but Orange County's share of those opportunities lags behind similarly-sized San Diego.

Patent grants to Orange County inventors between 2000 and 2003 grew by 18.8% to 1,994 patent grants in 2003. While less than national leader Silicon Valley in number of patent grants, Orange County is comparable to peer metropolitan areas and had a greater percentage increase in patents over the previous three years than Austin, Boston and Los Angeles.

Comparison of Patent Grants by Region, 2000-2003

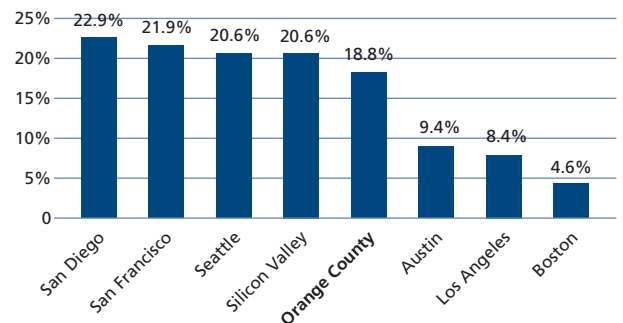


Metropolitan Region Share of National Venture Capital Investments, 2004 (January through June)



Note: Tech Coast is Los Angeles, Orange, and San Diego Counties.
 Source: PricewaterhouseCoopers/Tbomson Venture Economics/NVCA Moneytree Venture Capital Profiles (www.ventureeconomics.com/vec/stats/2004q2/0MAINMENU.html)

Patent Grants Awarded
 Percent Change, 2000-2003



Source: United States Patent Office (www.uspto.gov)

Computer and Internet Access in Schools Improves

Description of Indicator

This indicator measures the technological know-how of the future workforce by tracking: the number of K-12 students per computer and the number of students per classroom with Internet access, and the percent of 11th and 12th grade enrollment taking upper level math in Orange County public school districts.

Why is it Important?

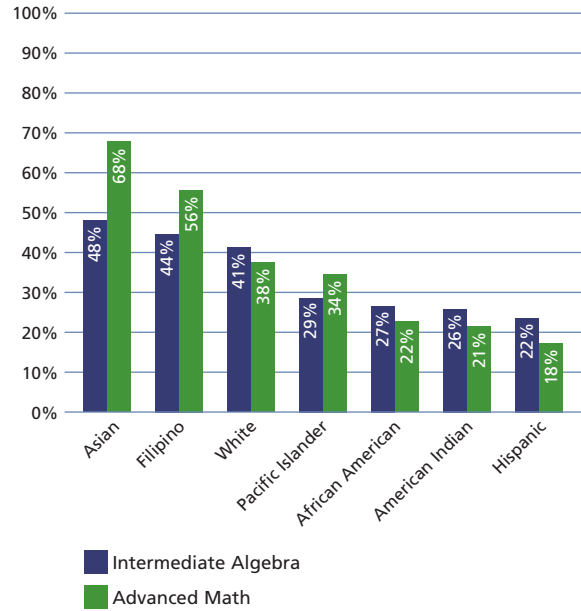
Computer and math skills are some of the most important technical skills that a student can possess in the new knowledge-driven economy. Lower numbers of students per computer implies better access to computer resources. Many experts agree that a ratio of four to five students per computer represents a reasonable level for the effective use of computers in schools. The Internet is a major research tool for students and an instructional device for teachers. Intermediate algebra is required for UC/CSU entry and provides the background needed for advanced math courses and many technology-related jobs.

How is Orange County Doing?

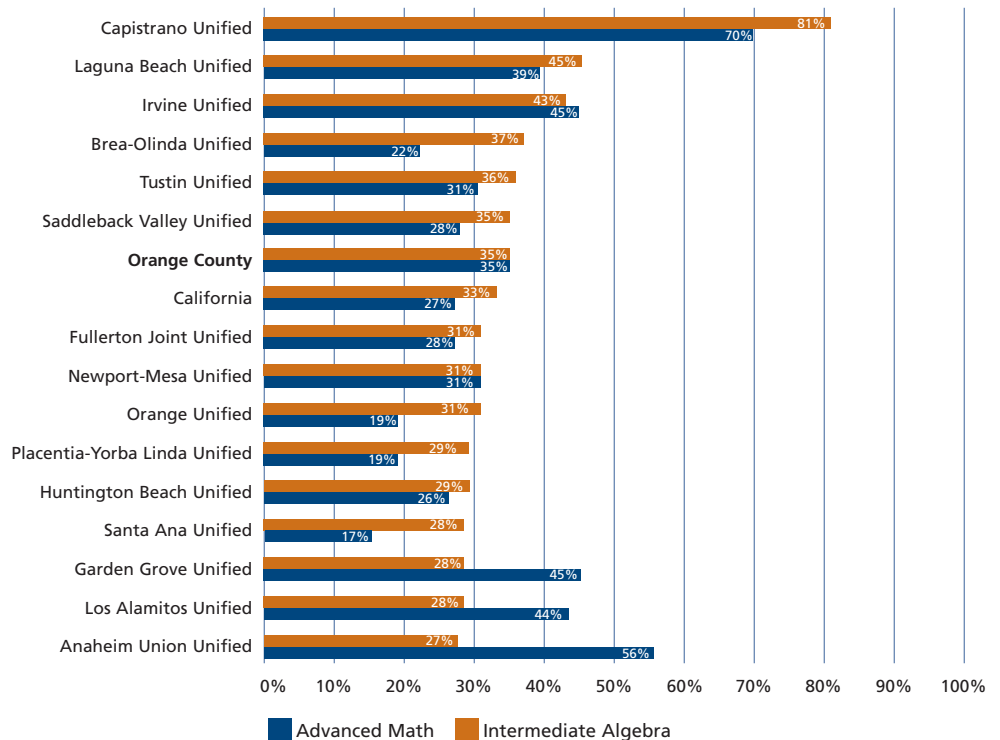
Computer access in Orange County schools has improved substantially in the past five years. The average number of K-12 students per computer in the county dropped from 8.6 in 1999/00 to 5.4 in 2003/04. Orange County still lags behind the California average of 5.0 students per computer. Looking at Internet access, Orange County had an average of 23.9 students per classroom with Internet access in 2004 compared to the California average of 21.4. While California has a better ratio than Orange County, the county's ratio improves every year.

Over the past five years upper level math-taking by Orange County 11th and 12th graders has been on the rise. There has been a 19% increase in students taking intermediate algebra and a 44% increase in those taking advanced math since 1999/00. With 35% of Orange County 11th and 12th graders taking intermediate algebra and 35% taking advanced math, the county as a whole surpasses the state averages for intermediate algebra (33%) and advanced math (27%). However, enrollment varies by ethnicity and school district.

Enrollment in Upper Level Math by Ethnicity
Orange County, 2003/04



District Enrollment in Upper Level Math Courses
Orange County, 2003/04



Source: California Department of Education (<http://data1.cde.ca.gov/dataquest>)

Undergraduate Tech Degrees Continue To Increase; Graduate Degrees Remain Stable

Description of Indicator

This indicator measures the number of technology-related degrees conferred by local universities.

Why is it Important?

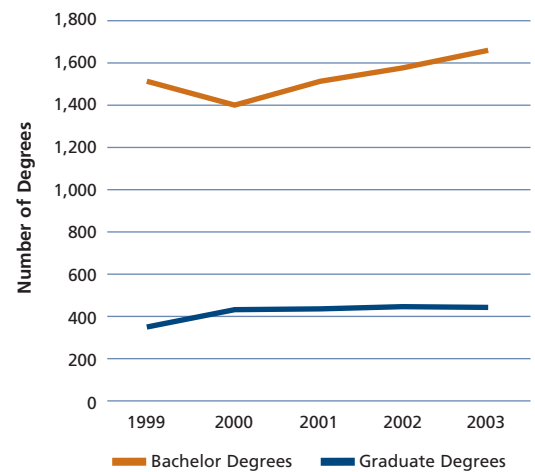
Effective workforce development and training is vital to Orange County's continued economic wellbeing. This is particularly true in recent years, as growth in Orange County's high-tech sector spurs the local demand for graduates with technical skills. High-tech jobs also provide good wages for employees.

How is Orange County Doing?

The number of undergraduate degrees earned in the county in fields related to technology increased by 6% in 2003 following an upward trend since 2000.

The number of technology-related graduate degrees awarded in Orange County has been stable, at approximately 400, since 1994. Given the importance of technology in the county's economy, and the growth of Orange County's population, one would expect to see increases in the total number of technology-related graduate degrees. While the shift in types of graduate degrees from the physical sciences to engineering and information and computer sciences appears to reflect changes in the county's economy, the total number of technology-related graduate degrees may not be keeping pace with the county's needs.

Tech-Related Degrees Granted, 1999-2003



Number of Tech-Related Bachelor Degrees Conferred at Orange County Universities

	1999	2000	2001	2002	2003
Biological Sciences	593	477	505	516	524
Biology	122	133	121	113	122
Engineering	226	239	330	313	359
Information and Computer Sciences	189	213	198	230	331
Computer Sciences	95	78	119	138	124
Physical Sciences	239	244	222	224	181
Other Sciences	52	18	13	37	31
Total	1,516	1,402	1,508	1,571	1,672

Note: Other Sciences includes environmental science, kinesiology, movement and exercise science.

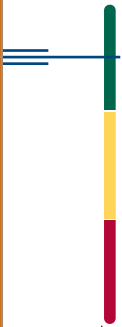
Number of Tech-Related Graduate Degrees Conferred at Orange County Universities

	1999	2000	2001	2002	2003
Biological Sciences	47	43	33	42	42
Biology	13	17	13	12	18
Engineering	141	152	148	154	177
Information and Computer Sciences	17	49	55	67	70
Computer Sciences	25	21	28	41	41
Physical Sciences	75	115	111	93	62
Other Sciences	42	37	42	36	38
Total	360	434	430	445	448

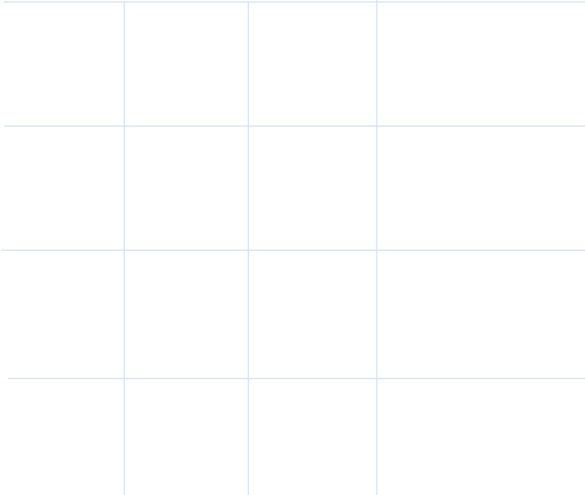
Note: Other Sciences includes physical therapy, food science and nutrition.

Sources: California State University, Fullerton, Chapman University, and University of California, Irvine

Education



SAT scores are **strong**, English fluency increases, and ROP and community college students are **readily placed**. Orange County's overall high school dropout rate is half of California's. But Latinos, our largest ethnic population, had the **highest** rate of **dropouts**.



Career Education Students Readily Placed

Description of Indicator

This indicator assesses the status of career training and workforce development in Orange County. Regional Occupational Programs (ROP) provide on-the-job, school-based, or training center-based career technical education courses and certificate programs for high school students and adults. Many of their courses correspond with community colleges for credit or advanced placement. Community colleges provide general education and career technical education courses, degrees and certificates for high school graduates and adults, and serve as a conduit for transfers to four-year universities.

Why is it Important?

Career technical education is a critical component of the county's education and workforce development system. It provides supplemental skills for college-bound high school students and graduates, offers opportunities for adults re-entering the workforce or changing careers, and supplies the local economy with a diverse and well-trained labor force.

How is Orange County Doing?

Enrollment

Each year, approximately 30,000 high school students and 25,000 adults are enrolled in Orange County ROP courses at their high school, worksite, or local training center. About 200,000 students are enrolled in any given fall or spring semester at Orange County's nine community colleges.

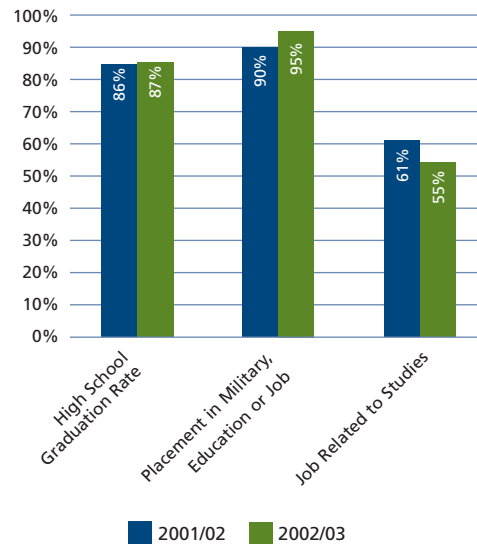
Graduation Rates and Degrees Granted

ROPs encourage high school students enrolled in their programs to get their high school diplomas and 87% of 12th graders did so in 2002/03, up slightly from 86% in 2001/02 and 2000/01. Orange County community colleges granted a total of 7,148 Associate degrees and 2,423 certificates in 2002/03. Over the past five years, Associate degrees have trended upward while certificates have remained steady.

Placement

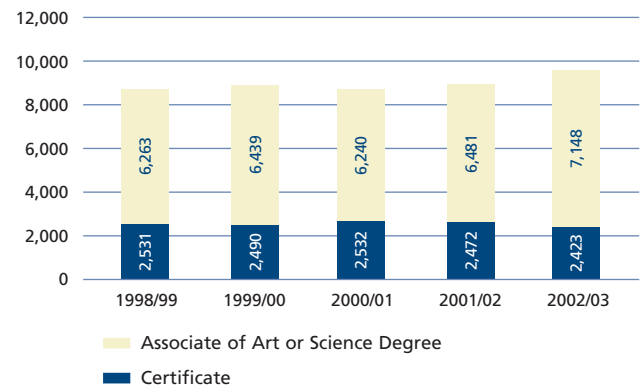
The most recent data available reveals 95% of ROP students and 85% of community college students were placed after completing their course of study. Showing a modest match between the skills taught and the demands of the local economy, 55% of ROP students employed after completing the program in June of 2002/03 were employed in a field related to their course of study six months later. This compares to 61% in the previous year. Among community college students in career education, those getting degrees or certificates in Health had the highest placement rate (94%), followed by Public Affairs and Business & Management (both 88%). Fine & Applied Arts and Agriculture & Horticulture had the lowest placement rates, yet both were still relatively high (72% and 59%, respectively). On average, Orange County community college students exceeded the state performance goals for skill attainment, completion, placement, and retention.

Regional Occupational Programs Performance Orange County, 2002 and 2003



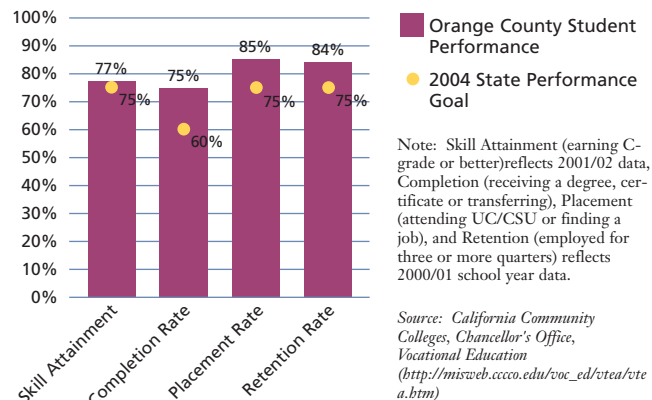
Sources: Capistrano-Laguna, Coastline, Central County, and North County Regional Occupational Programs

Degrees and Certificates Granted at Orange County Community Colleges, 1999-2003



Source: California Community Colleges, Chancellor's Office, Data Mart (www.cccco.edu/divisions/tris/mis/reports.htm)

Community College Career Technical Curriculum Performance Orange County, 2001



Dropout Rate and Percent Completing High School or College Maintain Positive Trends

Description of Indicator

This indicator measures the educational attainment of Orange County residents over 25 years of age, compared to neighbor and peer regions. It also measures by ethnicity the percentage of Orange County public high school students who drop out in a given year.

Why is it Important?

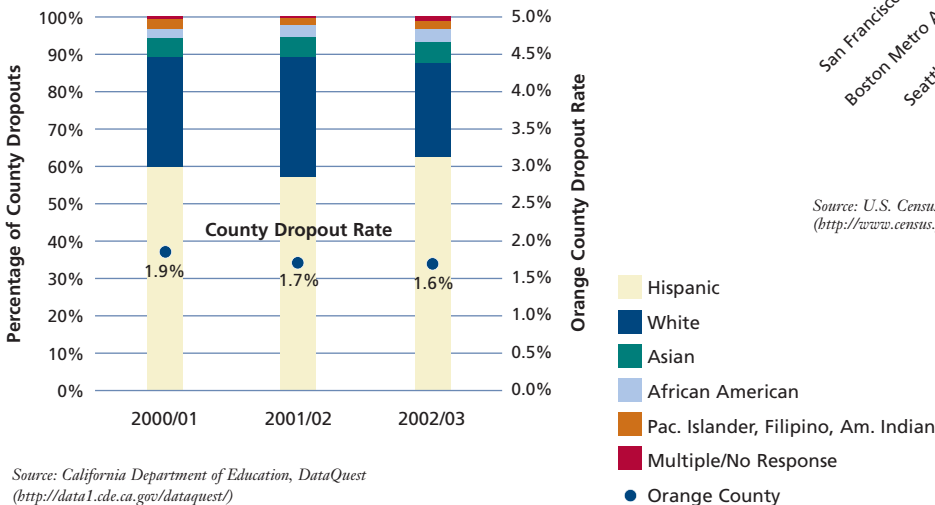
Educational attainment is important not only for personal success, but for sustaining the local economy with a skilled workforce. A high school diploma or college degree opens many career opportunities that are closed to those without these achievements. Additionally, the education level of residents is evidence of the quality and diversity of our labor pool – an important factor for businesses looking to locate or expand in the region.

How is Orange County Doing?

In 2003, 2,490 Orange County high school students dropped out of high school, or 1.6% of total enrollment. This is half the California rate of 3.2%. Orange County's annual dropout rate continued to decline in 2003, but this varies by ethnicity. The Hispanic student population was the largest proportion of dropouts (63% of all dropouts) followed by White students (24%) and Asian students (6%). However, the dropout rate among Hispanic students, while still above the county average, has improved over the past three years from 3.2% to 2.7%. The dropout rate among White students has also improved while the rate among Asian students has remained steady.

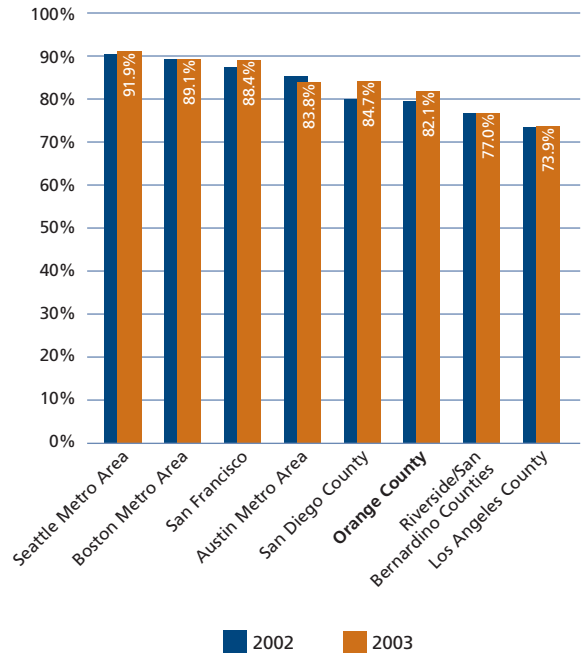
In 2003, the percentage of residents over 25 with a high school diploma increased slightly for Orange County, Seattle, San Diego, and San Francisco. Orange County remains the Southern California county with the highest percentage of bachelor degree earners (33.5%) over 25. Still, when compared to Northern California and out of state peers, Orange County has fewer residents over 25 with a bachelor degree.

Dropouts by Race/Ethnicity Orange County, 2001-2003

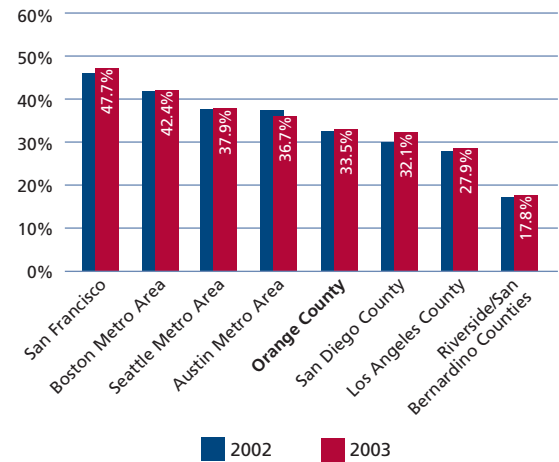


Source: California Department of Education, DataQuest (<http://data1.cde.ca.gov/dataquest/>)

Percent Over 25 Who Completed High School 2002 and 2003



Percent Over 25 with a Bachelor Degree 2002 and 2003



Source: U.S. Census Bureau, American Community Survey, Data Tables (<http://www.census.gov/acs/www/Products/index.htm>)

SAT Scores are Strong; UC/CSU Eligibility Declines

Description of Indicator

This indicator measures the number of public high school graduates who have fulfilled minimum course requirements to be eligible for admission to University of California (UC) or California State University (CSU) campuses, percentage of high school graduates taking the Scholastic Aptitude Test (SAT), and SAT scores.

Why is it Important?

A college education or related skilled certification is important for many jobs in Orange County. To gain entry to most four-year universities, high school students must complete the necessary course work and perform well on standardized tests.

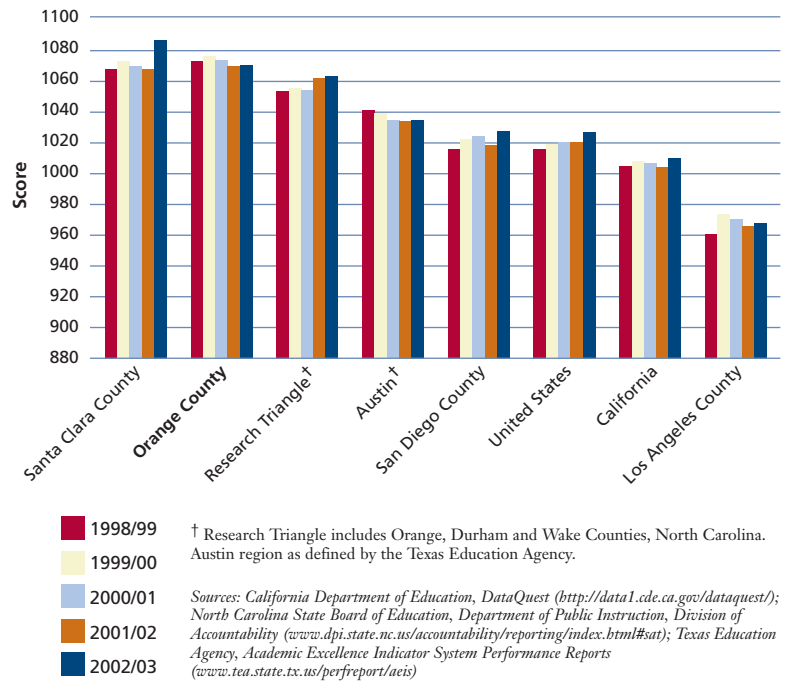
How is Orange County Doing?

Since 2000/01, the percentage of Orange County students taking the coursework necessary to be eligible for a UC or CSU campus has declined by 2.4%. The California rate of decline is comparable at 2.1%. Latinos make up a majority of K-12 enrollment yet have the lowest rate of students taking the classes needed to get into college. The county's average SAT score has remained relatively steady keeping Orange County close to the top compared to the nation, state and peer regions.

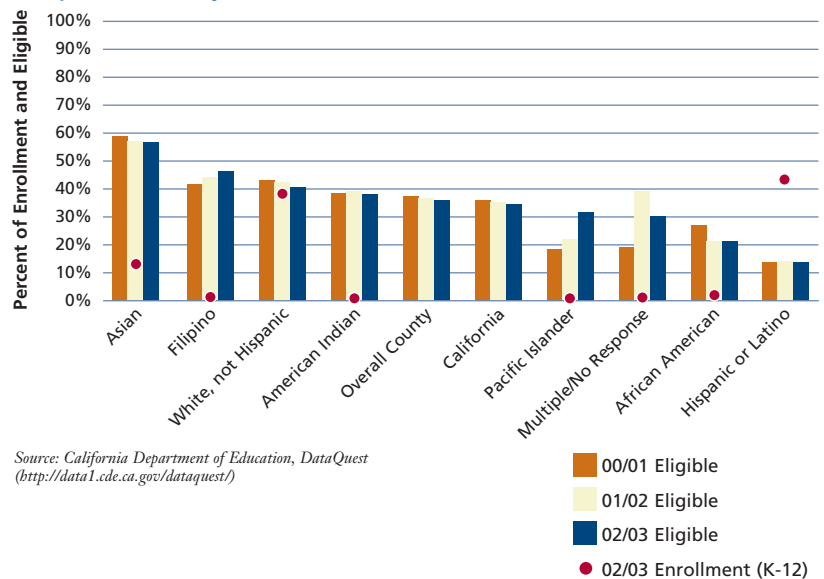
Percent of Students Taking the SAT

School District	2002/03	Three-Year Trend
Laguna Beach Unified	69%	↑
Irvine Unified	65%	↑
Brea-Olinda Unified	60%	↓
Los Alamitos Unified	56%	↔
Saddleback Valley Unified	51%	↑
Tustin Unified	50%	↑
Placentia-Yorba Linda Unified	49%	↔
United States Average	48%	N/A
Newport-Mesa Unified	48%	↔
Capistrano Unified	48%	↑
Orange County Average	42%	↑
Orange Unified	40%	↓
Fullerton Joint Union High	39%	↑
Anaheim Union High	38%	↑
Huntington Beach Union High	37%	↔
California Average	37%	↑
Garden Grove Unified	33%	↔
Santa Ana Unified	30%	↑

SAT Scores: Metro/State Comparison, 1998/99-2002/03



Percent of Graduates Who Completed UC/CSU Coursework Compared to County Enrollment, 2000/01-2002/03



College Entrance and Admission Rates

Percent of Recent Public High School Graduates entering California Colleges and Universities

Orange County, California, Three-year Average, 1999-2002

	Orange County	California
Community Colleges	40%	32%
CSU	10%	10%
UC	9%	8%

Source: California Postsecondary Education Commission, Educational and Demographic Profiles, Orange County (www.cpec.ca.gov/CompleteReports/2004Profiles/County30.pdf)

Percent of Orange County Applicants Accepted as Freshman to a UC or CSU Compared to California Average, Fall 2002

	Orange County	California
UC	77%	78%
CSU	60%	55%

Source: University of California, Office of the President (www.ucop.edu/news/studstaff.html) and California State University, Analytic Studies, Statistical Abstract (www.calstate.edu/as/abstract.shtml)

Most Schools Meet State-Set Growth Target

Description of Indicator

This indicator summarizes the average Academic Performance Index (API) score for each school district.¹ The API ranges from a low of 200 to a high of 1000 with a statewide target of 800 or better. It is calculated for each school based on the performance of individual pupils on various standardized tests that are part of California's Standardized Testing and Reporting (STAR) program and the California High School Exit Examination (CAHSEE). The tests included are the following:

- The California English-Language Arts (ELA) Standards Test for grades two through 11
- The California Mathematics Standards Test for grades two through 11
- The California History/Social Science Standards Test for grades 10 and 11
- The CAHSEE for high schools
- The California Achievement Test, Sixth Edition Survey (CAT/6)
- The California Science Standards Test for grades nine through 11

Individual school scores are available from the California Department of Education at: www.data1.cde.ca.gov/dataquest/.

Why is it Important?

The Academic Performance Index enables school administrators and the public to evaluate how well Orange County schools are performing academically.

How is Orange County Doing?

In 2004, Orange County saw an improvement in its average API score. As in 2003, approximately 75% of schools in Orange County met their state-set growth targets for 2004. Eight districts had scores over the statewide goal of 800.

Average API Scores for Orange County School Districts 2003 and 2004

	2003 API	2004 API
Irvine Unified	862	872
Los Alamitos Unified	831	848
Fountain Valley Elementary	841	844
Cypress Elementary	828	838
Huntington Beach City Elementary	815	826
Brea-Olinda Unified	826	823
Saddleback Valley Unified	820	822
Laguna Beach Unified	831	820
Capistrano Unified	791	798
Ocean View Elementary	790	794
Placentia-Yorba Linda Unified	774	783
Tustin Unified	754	771
Orange County Average	754	761
Centralia Elementary	758	759
Savanna Elementary	753	747
Fullerton Elementary	742	746
Orange Unified	731	746
Huntington Beach Union High	720	741
Westminster Elementary	725	737
Newport-Mesa Unified	737	734
Fullerton Joint Union High	703	730
Garden Grove Unified	719	726
Buena Park Elementary	708	719
La Habra City Elementary	695	701
Magnolia Elementary	701	698
Anaheim Union High	651	658
Anaheim Elementary	644	642
Santa Ana Unified	613	624

Source: California Department of Education, DataQuest
(www.data1.cde.ca.gov/dataquest/)

¹ The API scores presented are the Growth scores as printed in the California Department of Education's yearly API Growth Report.

Percent of English Learners Drops for First Time in Ten Years; English Fluency Increases

Description of Indicator

This indicator measures the percentage of enrolled students who are English language learners in Orange County public schools. Also shown is the percent of English Learners redesignated to Fluent English Proficient (FEP) as well as English Learner enrollment compared to neighboring and peer California counties. Children for whom English is a second language are given a test upon enrollment in school, and yearly thereafter, to assess their English fluency. Students are identified as either English Learner (students who are not fluent in English), initially Fluent English Proficient (students for whom English is a second language, but are initially identified as fluent in English), or redesignated Fluent English Proficient (students initially identified as English Learner, but are now considered fluent in English).

Why is it Important?

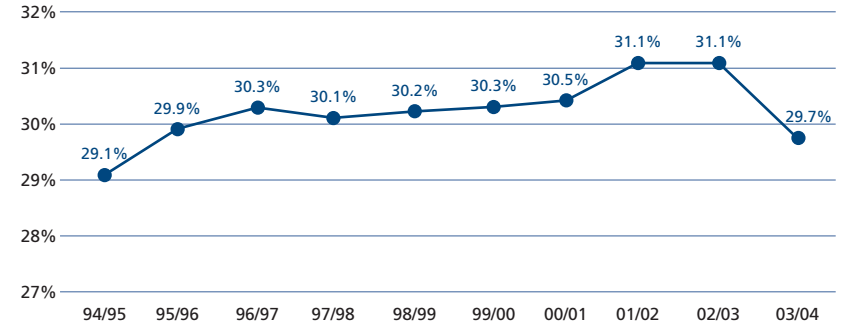
Students who have limited English speaking skills often face academic, employment and financial challenges. An educated workforce with good communication skills is important for a strong economy.

How is Orange County Doing?

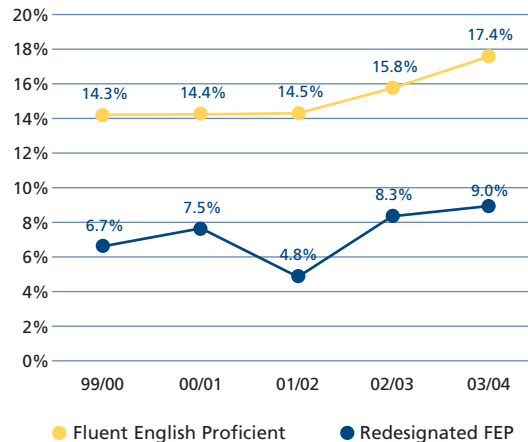
In 2003/04 the percent of total public school enrollment in Orange County made up of English Learners dropped noticeably for the first time since tracking for this indicator began in 1987/88. In the past year, the percentage of English Learners dropped from 31.1% to 29.7%. Preserving Orange County's upward trend in English fluency, both the percentage of Fluent English Proficient students and students redesignated Fluent English Proficient increased this past year. The proportion of FEP students increased 1.6 percentage points; the proportion of those students redesignated FEP grew by 0.7 points.

Compared to neighbor and peer counties, Orange County again in 2003/04 had the second largest enrollment of English Learners (29.7%). Since 2001/02, Los Angeles and Orange Counties have had the first and second largest enrollment of English Learners of the compared counties, while San Bernardino has maintained the lowest enrollment.

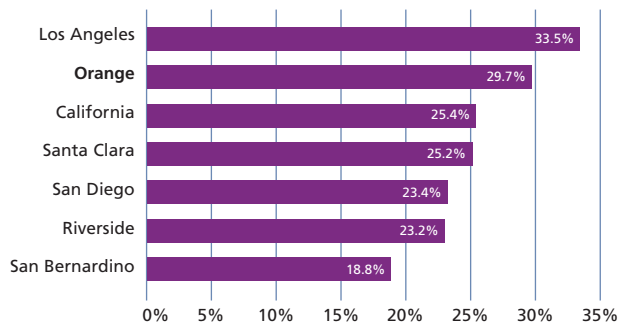
English Learners as Percent of Total Enrollment
Orange County, 1995-2004



Percent of Enrollment Comprised of Fluent English Proficient (FEP) Students & Students Redesignated Fluent English Proficient
Orange County, 2000-2004




English Learners as a Percent of Total Enrollment
County Comparison, 2003/04

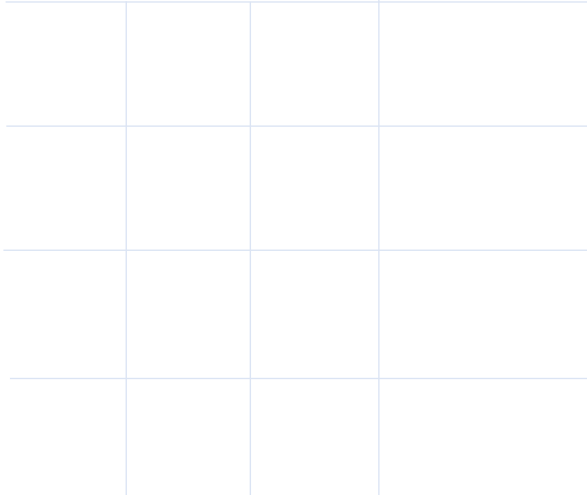


Source: Department of Education, DataQuest (<http://data1.cde.ca.gov/dataquest/>)

Community Health and Prosperity



Many indicators are positive: **more** mothers received prenatal care and more children were **immunized**. Most older adults are safe, healthy and financially stable. On the down side, more youth are **overweight**. We have a growing homeless population and **increasing** child **poverty**.



Early Prenatal Care Rate Keeps Improving

Description of Indicator

This indicator measures the percentage of live births to Orange County women who began prenatal care during the first three months of pregnancy, with racial and ethnic detail. Rates of early prenatal care in Orange County are also compared to peer counties and California overall.

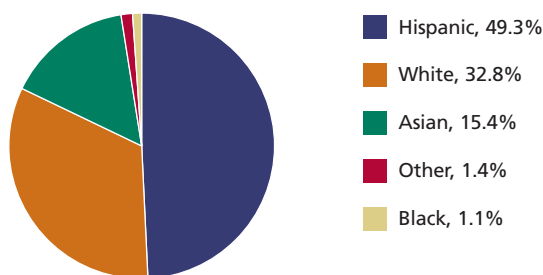
Why is it Important?

Early prenatal care provides an effective and cost-efficient way to prevent, detect and treat maternal and fetal medical problems. It provides an excellent opportunity for health care providers to offer counseling on healthy habits and lifestyles to lead to an optimal birth outcome. Higher levels of low birth weight and infant mortality are associated with late or no prenatal care.

How is Orange County Doing?

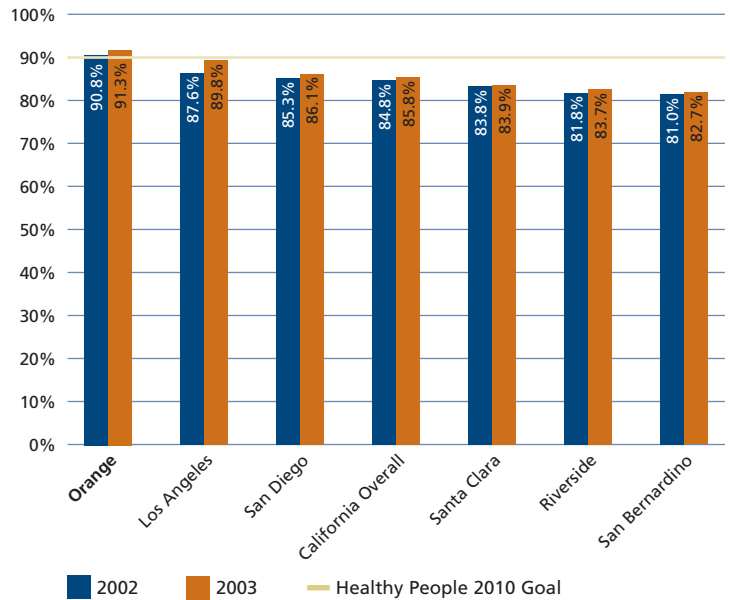
For the second year in a row, Orange County achieved the Healthy People 2010 early prenatal care goal of 90% with 91.3% of mothers receiving early prenatal care in 2003. Asian and Hispanic mothers led the countywide half-point increase in early prenatal care between 2002 and 2003, improving 1.8% and 0.9%, respectively. Black mothers showed the largest drop in the past year but the 2003 rate of 85.5% is still above the five-year average for Black mothers. Due to the small number of births to Black mothers in Orange County, variations in prenatal care rates from year to year are more pronounced. Among peer counties, each witnessed an increase in early prenatal care levels between 2002 and 2003, but only Orange County met the Healthy People 2010 goal. Over the past five years, Riverside, San Bernardino, and San Diego Counties have had the fastest rate of improvement, about a 2% increase annually compared to Orange County's average annual improvement of 1.4%. Most births in Orange County are to Hispanic mothers, followed by White and Asian mothers.

Live Births in Orange County by Race and Ethnicity, 2003



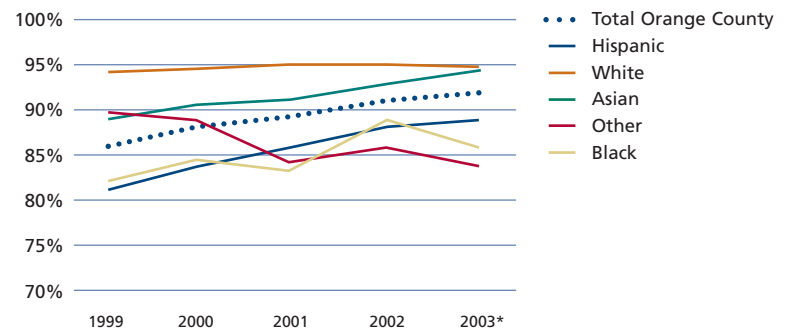
Sources: County of Orange Health Care Agency, Epidemiology and Assessment and California Department of Health Services, Birth Records

Percent of Mothers Receiving Early Prenatal Care County Comparison, 2002 and 2003



Source: State of California, Department of Health Services, Birth Records (www.dhs.ca.gov/hisp/cbs/OHIR/ssdata/tables.htm)

Percent of Mothers Receiving Early Prenatal Care by Race and Ethnicity, 1999-2003



* 2003 data is considered preliminary.

Note: The ethnic category Hispanic includes any race; the racial categories White, Asian, and Black are all non-Hispanic.

Sources: County of Orange Health Care Agency, Epidemiology and Assessment and California Department of Health Services, Birth Records

What is Healthy People 2010?

Healthy People 2010 is a national health promotion and disease prevention initiative which establishes national health objectives to improve the health of all Americans, eliminate disparities in health, and improve years and quality of healthy life.

Reversing Gains of Last Two Years, Accidents Figure Prominently Again

Description of Indicator

This indicator measures the five leading causes of death for infants (under one year) and children ages one through four years in Orange County (shown as raw number of deaths) and deaths for children ages birth through four years due to all causes compared to peer California counties (shown as number of deaths per 100,000 children ages birth through four years).

Why is it Important?

Awareness of the leading causes of death for children can lead to intervention strategies that can help prevent mortality. Many of these deaths are preventable through improved prenatal care and education.

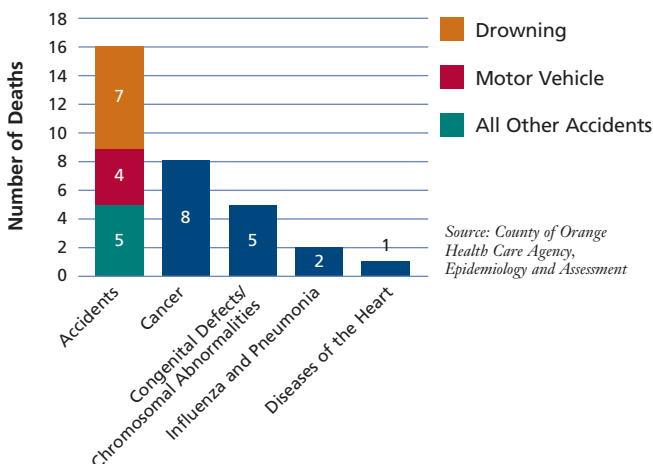
How is Orange County Doing?

An increase in infant deaths combined with a decrease in deaths among children ages one through four led to a slight rise in Orange County's total rate of death for children under five years of age in 2002 (105.3 per 100,000 children). Orange County now has the third lowest rate among peers, compared to the second lowest rate the previous year.

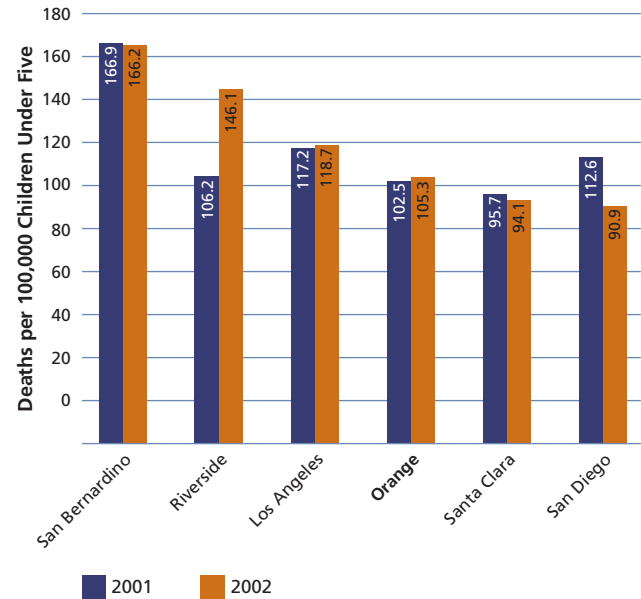
Congenital defects or chromosomal abnormalities (such as spina bifida or Down's syndrome) continue to top the list of leading causes of death for infants. The second leading cause of infant death, prematurity or low birth weight, reversed the three-year downward trend in 2002, rising 66% in one year. Accidents return to the top five causes, accounting for 10 infant deaths. In 2002 there was one death for every 216 infants.

Accidents figure prominently for children ages one through four as well, returning to the leading cause of death for this age group. Other leading causes of death showed improvement, resulting in an overall lower death rate for this age group. In 2002 there was one death for every 5,222 children ages one through four.

Leading Causes of Death for Children Ages One Through Four Orange County, 2002

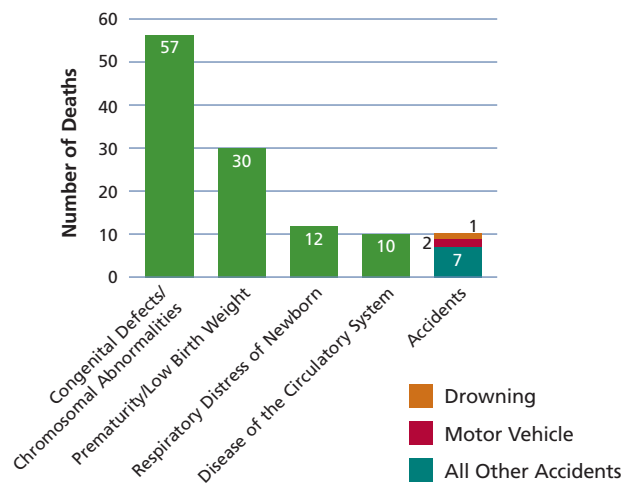


Death Rate Due to All Causes for Children Under Five County Comparison, 2001 and 2002



Sources: County of Orange Health Care Agency, Epidemiology and Assessment, and California Department of Health Services, Death Records

Leading Causes of Death for Infants (Under One) Orange County, 2002



Source: County of Orange Health Care Agency, Epidemiology and Assessment

Hepatitis A and B Reappear; Immunizations Increase

Description of Indicator

This indicator measures immunization rates in Orange County and California for children at two years of age and reported cases among children under six years of age (0-5) of vaccine-preventable diseases.

Why is it Important?

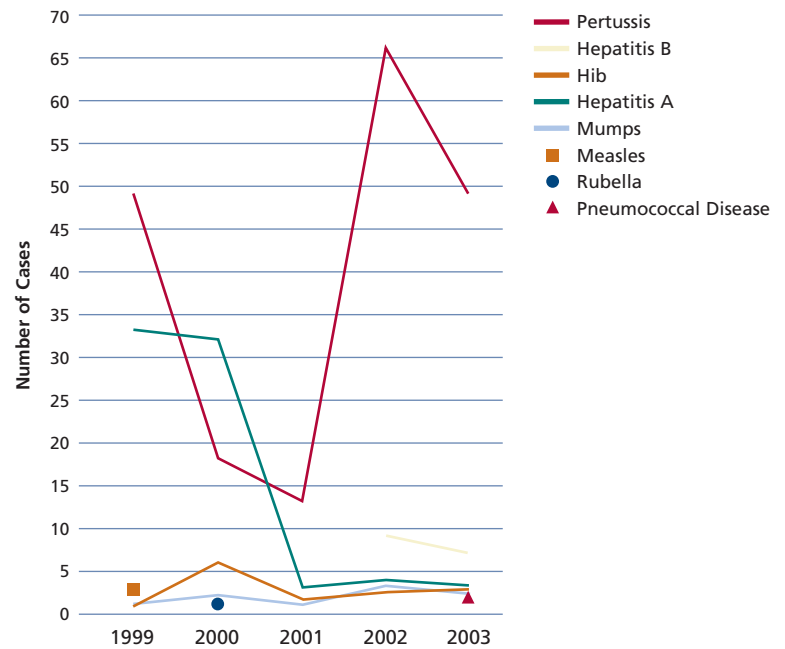
Immunization is considered to be one of the most important interventions available for preventing serious diseases among infants and children. The Healthy People 2010 immunization objective is for 90% of young children (age 1½ to 2¾) to be protected by universally recommended vaccines.

How is Orange County Doing?

Orange County's Hemophilus influenza type B (Hib) cases accounted for three out of the four cases reported statewide in 2003. There were two cases of pneumococcal disease and two cases of hepatitis A in 2003. Hepatitis B cases were reported again in 2003 after many years of little or no incidence. Pertussis (whooping cough) cases remained high in 2003 with 49 cases. Since the majority of the pertussis cases occurred in children under one year of age and the fourth dose of the vaccine is usually given between 15 and 18 months, the large number of children with pertussis suggests new transmission to children not yet fully immunized for age (i.e. under 18 months of age) or un-/under-immunized. There were no other incidences of vaccine-preventable diseases in 2003.

The percentage of children adequately immunized at age two continues to increase in Orange County. In the past 10 years, there has been a 13 point increase in Orange County and a 14 point increase statewide. Immunization levels by age two for other recommended vaccines vary: hepatitis B (90%), Hib (83%), and varicella (66%). These levels match or exceed the statewide averages.

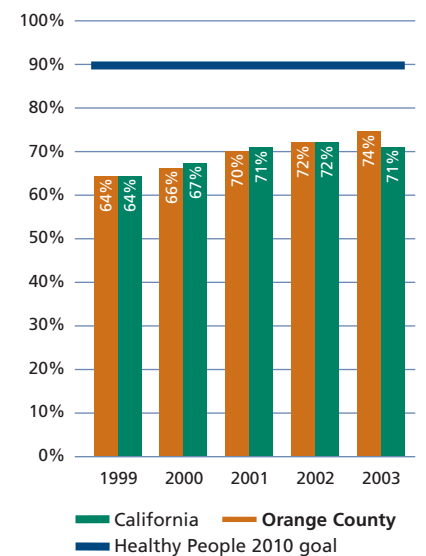
Vaccine-Preventable Diseases Among Children Under Six Years of Age Orange County, 1999-2003



Note: There were no reported cases of diphtheria, tetanus, or polio during this period among children under six years of age.

Source: County of Orange Health Care Agency, Epidemiology and Assessment

Percent of Children Immunized at Two Years of Age Orange County and California, 1999-2003



Sources: State Department of Health Services, Immunization Branch, Kindergarten Retrospective Survey (www.dhs.ca.gov/ps/dcdi/isgroup/index.htm); 10th Annual Report on the Conditions of Children in Orange County 2004; and County of Orange Health Care Agency

	Cases Required to be Reported	Doses to be Adequately Immunized by Age Two	Doses Also Recommended by Age Two	Doses Required to Enter Kindergarten
Diphtheria/Tetanus/Pertussis (DTaP)	✓	4		5
Hemophilus influenza type B (Hib) ^a	✓		1	
Hepatitis A	✓		2	
Hepatitis B	✓		3	3
Influenza ^b				
Measles/Mumps/Rubella (MMR)	✓	1		2
Pneumococcal disease ^a	✓		4	
Polio	✓	3		4
Varicella (Chicken Pox) ^c			1	1

^a Pneumococcal disease and Hib are the most common causes of serious bacterial infections such as meningitis (infection of the lining of the brain and spinal cord) and pneumonia (infection of the lungs). Hib vaccination is required for entry to child care. Pneumococcal disease cases became reportable in 2003.

^b Vaccination is recommended annually for children ages 6 to 23 months.

^c Only hospitalizations or deaths are required to be reported.

Sources: State Department of Health Services, Immunization Checklist and School Law Guide for Parents (www.dhs.ca.gov/ps/dcdi/isgroup/index.htm).

One in Seven Orange County Youth Have Asthma

Description of Indicator

This indicator compares asthma diagnoses among Orange County children ages one to 18 to peer counties and the state. Asthma is characterized by recurrent episodes of breathlessness, wheezing, coughing, and chest tightness triggered by respiratory infections, house dust mites, cockroaches, animal dander, mold, pollen, cold air, exercise, stress, tobacco smoke and indoor and outdoor air pollutants.

Why is it Important?

Asthma prevalence has more than doubled in the past two decades, with children under five experiencing the highest degree of increase. Nationwide, in 2001, as many as 87 out of 1,000 children (6.3 million) had asthma and 57 out of 1,000 children (4.2 million) had an asthma attack in the previous year (up from 53 out of 1,000 or 3.8 million in 1998). In 2000, 728,000 children visited emergency departments at a rate of 104 per 10,000 and 223 died. Children ages 0-4 years had the highest rate of emergency department visits (180 per 10,000). Experts are not certain why the prevalence is rising or why certain children develop asthma, but the personal and societal costs are mounting.¹

How is Orange County Doing?

As of 2003, approximately one out of seven children in Orange County has been diagnosed with asthma at some point, up from one in 10 in 2001. Among counties compared, Orange County witnessed the greatest increase in pediatric asthma diagnoses, from 10.7% of the child population in 2001 to 14.3% in 2003. Still, fewer Orange County children have been diagnosed with asthma than the state average. Of the Orange County children diagnosed with asthma, 93.6% had symptoms in the previous 12 months. This is slightly higher than the California average of 92.3%. Most Orange County children experience symptoms infrequently, less than every month, but 22% experience symptoms every month, 9.4% experience symptoms every week, and 2.5% experience symptoms every day.

¹ Centers for Disease Control and Prevention, National Center for Health Statistics, Asthma Prevalence, Health Care Use and Mortality, 2000-2001 (<http://www.cdc.gov/nchs/>) and Department of Health and Human Services, Action Against Asthma: A Strategic Plan for the Department of Health and Human Services, May 2000 (www.aspe.hhs.gov/sp/asthma/overview.htm#epidemic)

Why is Asthma Prevalence Growing?

Although the causes of the rise in asthma over the past two decades are not known, the most likely reason is an interaction between environmental and genetic factors. Genetically inherited susceptibility to become allergic is the most important predictor of a person developing asthma, but this alone cannot be responsible for the dramatic and rapid increase in asthma prevalence since the genetic make-up of the population changes slowly.

The possible environmental factors are numerous. Many studies have demonstrated that exposure to indoor allergens and tobacco smoke are risk factors for more severe asthma. Some studies suggest that indoor allergen exposure is a risk factor for the initial onset of asthma. People now spend more time indoors, thus increasing exposure to indoor allergens and pollutants. Research has revealed that exposure to house dust mite allergen can cause the development of asthma in susceptible children. Exposure to tobacco smoke is associated with the development of asthma in younger children, however, maternal smoking during pregnancy is thought to have a stronger adverse affect than exposure after birth. Limited but suggestive evidence was found for associations between cockroach allergen exposure or respiratory syncytial virus (RSV) infection and the development of asthma in infants. Outdoor air pollution is also a potential factor. A UCLA researcher found that diesel exhaust particles (DEP) caused the immune system to make "allergic" antibodies to substances that normally would not trigger such a reaction, suggesting that DEPs may be involved in the early stages of allergic sensitization that lead to asthma.

There are other possible, but less well-studied and more controversial, factors that may affect the development of asthma. One hypothesis is that certain infections in early life may block the allergic immune response and thereby protect against asthma. Other factors postulated to cause asthma include the diet during the prenatal period and early infancy and obesity in adolescents and adults.

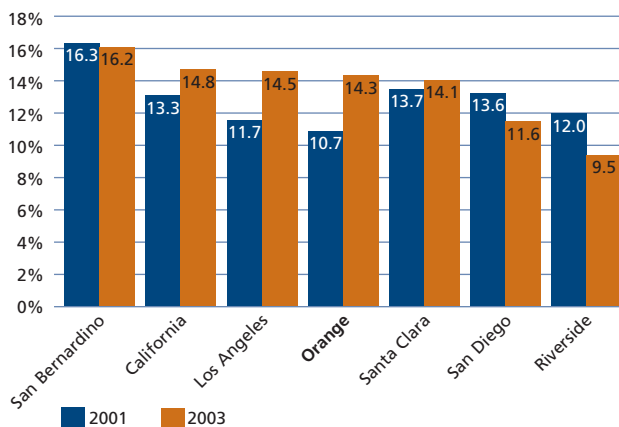
Sources: Department of Health and Human Services, Action Against Asthma, May 2000 and MedlinePlus (www.nlm.nih.gov/medlineplus/asthma.html)

Minorities and Poor Hardest Hit by Asthma

Although asthma affects Americans of all ages, races, and ethnic groups, low-income and minority populations experience substantially higher rates of fatalities, hospital admissions and emergency room visits due to asthma. Socioeconomic factors such as poverty, substandard housing that results in increased exposure to certain indoor allergens, lack of education about asthma, inadequate access to health care, and the failure to take appropriate medications may all contribute to the risk of having a severe asthma attack or, more tragically, of dying from asthma.

Source: Department of Health and Human Services, Action Against Asthma, May 2000

Children Ever Diagnosed with Asthma
County Comparison, 2001 and 2003



Source: University of California, Los Angeles, Center for Health Policy Research, California Health Interview Survey (www.chis.ucla.edu)

Proportion of Overweight Youth Keeps Rising

Description of Indicator

This indicator measures physical fitness of children by performance in six areas: aerobic capacity, body composition (percent of body fat), abdominal strength, trunk extension strength, upper body strength, and flexibility. Also measured is the percentage of children from low-income families who are considered overweight (body mass index equal or greater than the 95th percentile).

Why is it Important?

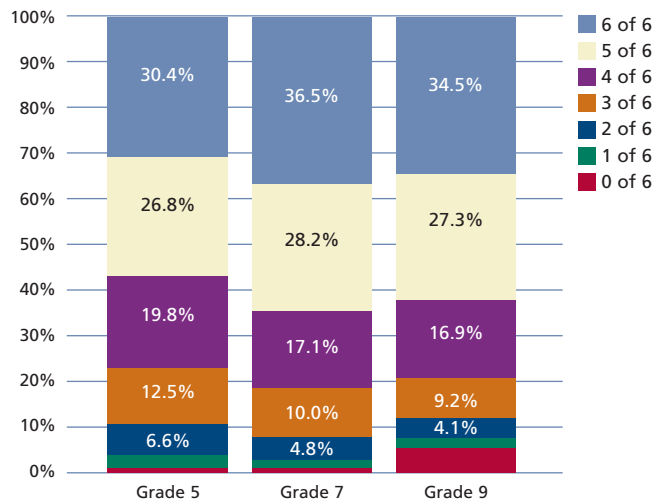
A sedentary lifestyle and being overweight are among the primary risk factors for many health problems. Cases of type II diabetes, highly correlated with overweight, has tripled in the under 18 population since 1997. Building a commitment to fitness and having a healthy body weight can have a positive impact on children's health now and in adulthood.

How is Orange County Doing?

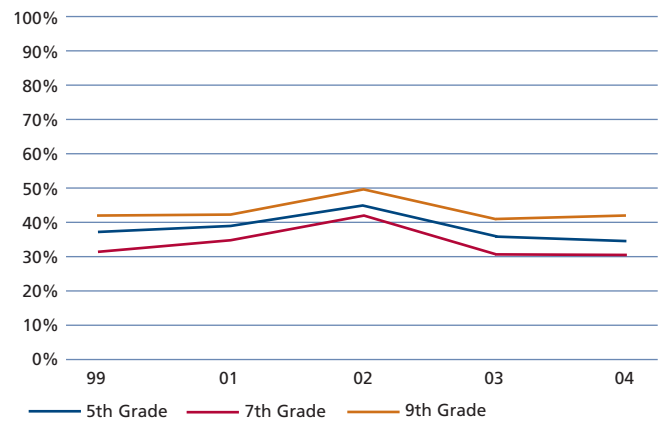
The number of Orange County students considered fit has steadily increased over the past three years and Orange County students performed between 6% and 8% better than the California average in 2004. However, about two-thirds of 5th, 7th, and 9th graders could not meet the six minimum fitness standards to be considered fit. The percentage of 9th graders unable to meet any of the six fitness standards rose from 3.5% to 6.2% in one year. Youth in 9th grade also consistently have poorer aerobic capacity than 5th and 7th grade youth. Nearly half (48.7%) of Hispanic 9th graders have poor aerobic capacity compared to 37.2% of White students and 35.9% of Asian students.

Among youth from low-income Orange County families, the proportion of overweight continues to grow. As a whole, 19.8% of youth were overweight in 2003 (compared to 19.5% in 2002). When broken down by age, 17.4% of two- to five-year olds (compared to 17.0% in 2002) and 21.5% of five- to 20-year olds (compared to 21.1% in 2002) were overweight.

Percent of Orange County Children Achieving Six Fitness Standards, 2004

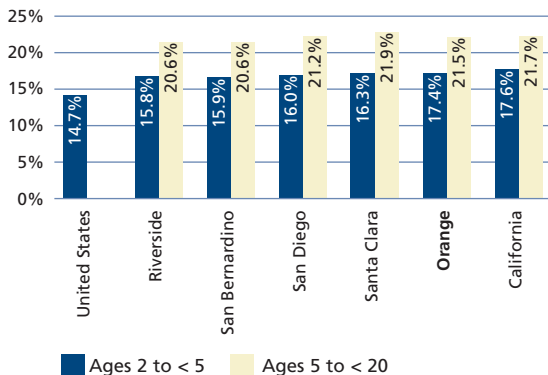


Percent of Orange County Youth Unable to Achieve Aerobic Capacity Standards, 1999-2004



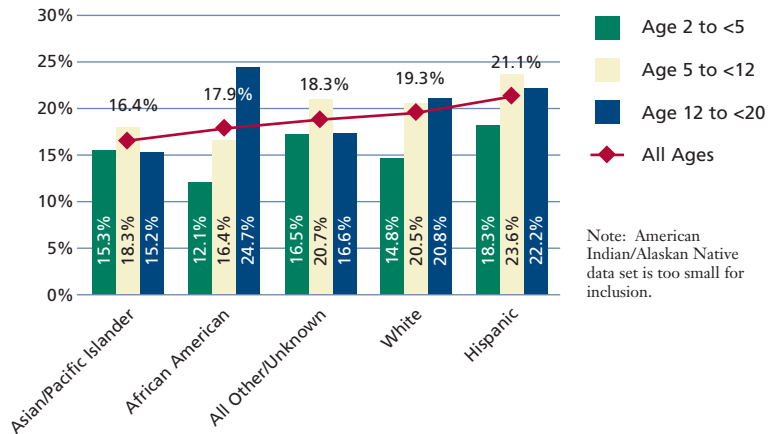
Note: The fitness test was not administered in 2000.
Source: California Department of Education (<http://data1.cde.ca.gov/dataquest>)

Percent of Low-Income Youth Who Are Overweight County Comparison, 2003



Note: U.S. data for ages five to 20 is not available. Data for Los Angeles County is divided into five areas and thus not included.

Percent of Low-Income Orange County Youth Who Are Overweight, by Race/Ethnicity, 2003



Note: American Indian/Alaskan Native data set is too small for inclusion.

Sources: Centers for Disease Control and Prevention, 2003 Pediatric Nutrition Surveillance System (www.dhs.ca.gov/pjfb/cms/onlinearchive/pdf/cbdp/informationnotices/2004/cbdpin04c/contents.htm)

Insurance Costs Contribute to High Child Care Costs

Description of Indicator

This indicator measures child care quality and affordability using the following metrics: change in family income and average annual child care worker pay compared to change in the average annual cost of child care; a comparison of the average yearly costs of infant (up to 24 months), preschool (age two through five), and school-age (six and up) center- and home-based care; the supply and demand for child care slots, and the number of licensed center-based child care programs accredited by the National Association for the Education of Young Children (NAEYC) and licensed home-based programs accredited by the National Association for Family Child Care (NAFCC). Accreditation is voluntary and requires early care and education providers to meet additional quality standards.

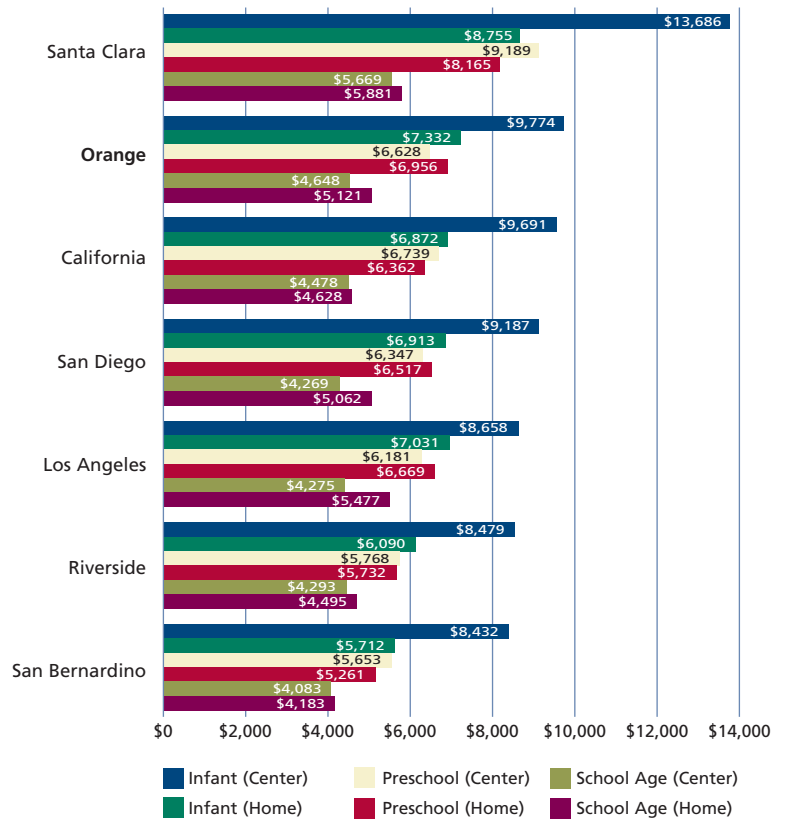
Why is it Important?

Research on children’s brain development and school readiness demonstrates the importance of high quality early education and care programs for young children. Affordable child care is essential for working families to maintain economic self-sufficiency. High child care costs and the gap between supply and demand of licensed slots places a significant burden on working parents.

How is Orange County Doing?

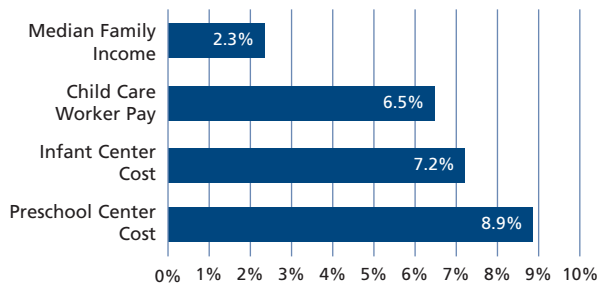
Orange County child care costs are above average, ranking second highest among the counties compared. Between 2000 and 2002 center-based child care costs rose more than three times as fast as the median family income but only somewhat faster than average annual child care worker pay. The rise in cost is partially a function of the gap in child care demand and supply. The rapidly rising cost of Workers’ Compensation insurance for center-based programs is another factor (rising as much as 180% per employee in the past two years). Across California, approximately 29% of child care centers report that they are considering closing their programs due to these increased costs. In Orange County, applying that same figure, 17,231 children could be potentially “at-risk” of losing their child care. As of 2004, there were an estimated 304,108 children potentially needing child care and 59,417 licensed child care slots. This leaves an estimated shortfall of approximately 244,691 child care spaces, a proportion that ranks Orange County among the lowest of California’s 58 counties in its supply of licensed child care slots per estimated need. As of December 2004, a total of 65 Orange County child care centers were accredited by the NAEYC. Out of 2,048 home-based programs, 13 homes were accredited by the NAFCC.

Average Child Care Costs
County Comparison, 2002



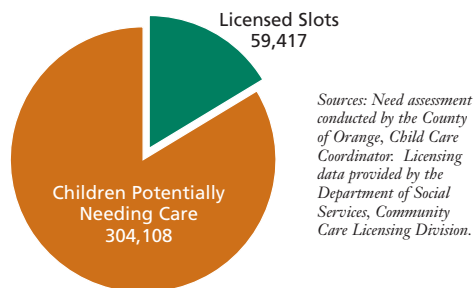
Source: California Child Care Resource and Referral Network

2000-2002 Percent Increase in:



Sources: California Child Care Resource and Referral Network; U.S. Bureau of Labor Statistics, State and County Employment and Wages from Covered Employment and Wages, 2000-2002 (www.bls.gov/data/home.htm); California State University, Fullerton, Center for Demographic Research, Orange County Progress Report 2003.

Child Care Slot Supply and Demand
Orange County, 2004



Sources: Need assessment conducted by the County of Orange, Child Care Coordinator. Licensing data provided by the Department of Social Services, Community Care Licensing Division.

Economic and Housing Challenges Persist for Low Income Families

Description of Indicator

This indicator measures Orange County families' progress toward self-sufficiency and economic stability by tracking the caseloads of core public assistance programs including CalWORKs (provides cash assistance and employment services), Food Stamps (provides resources to buy food), and Medi-Cal and Healthy Families (provide health care coverage).¹ This is compared to measures of economic status including children living in poverty and household income as approximated by the number of children eligible for free or reduced price school lunches. This indicator also measures homelessness and the problem of residential overcrowding.

Why is it Important?

Most families in Orange County do well, despite the county's high cost of living. The families struggling to get by are the focus of this indicator. They are susceptible to stress, unstable family relationships, and homelessness. Achieving self-sufficiency and economic stability can have lasting and measurable benefits for both parents and children.

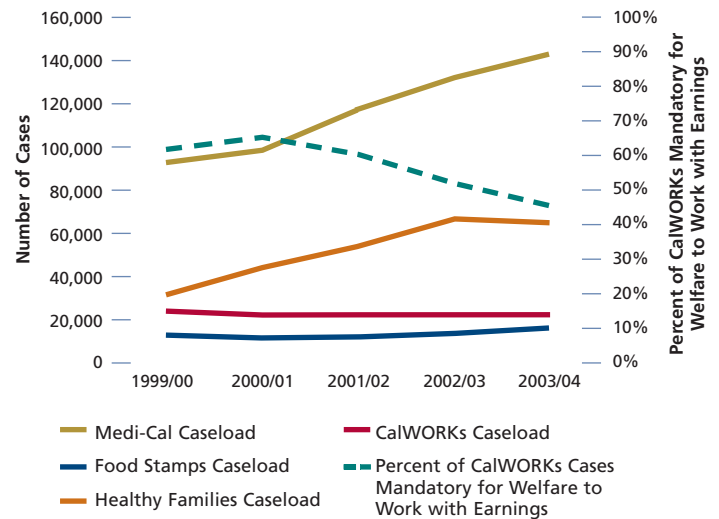
How is Orange County Doing?

Since 2000/01, trends signal prolonged and deepening challenges for those near or below poverty. Nearly static wage levels combined with rising rental housing and child care costs continue to present challenges (see pages 17, 21, and 45).

Public Assistance

In the years immediately following the enactment of the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 which established time limits on receiving benefits, Orange County's CalWORKs caseload dropped steeply (as much as 19% in one year). In recent years the caseload decreases leveled to about 1% annually, but in the most recent year there was a 4% decrease in caseload. With the strong economy of the late 1990s, the percentage of mandatory CalWORKs cases (cases with recipients mandated to participate in Welfare To Work) with earnings rose to a high of 65% in 2000/01 but has fallen steadily since then to 46% in 2003/04. Meanwhile, most of the caseloads for other public assistance programs which do not have time limits, such as Medi-Cal and Food Stamps, are rising. Healthy Families, which provides low cost health insurance to children and teens who do not qualify for free Medi-Cal, witnessed the first decrease in caseload since it was started in 1998/99. The factors contributing to these trends are complex but at least part of the decrease in CalWORKs caseload suggests the effects of time limits, while the percentage of CalWORKs recipients with jobs and the increased enrollment in other welfare programs suggest both increasing difficulty finding a job and/or having a job that pays enough to survive without public assistance. The rise in Medi-Cal and Food Stamp caseloads are also the result of program changes mandated by federal, state, and court decisions that expand eligibility and outreach efforts by program operators to inform income-eligible individuals of programs available to them.

Major Public Assistance Program Caseloads
Orange County, 2000-2004



Note: Improved data analysis allows for a new presentation of CalWORKs cases with earnings. The past five years of data have been updated and supercede data presented in previous Community Indicators reports.

Sources: County of Orange Social Services Agency and State of California, Managed Risk Medical Insurance Board, Healthy Families

¹ Since CalWORKs recipients generally also receive Food Stamps and Medi-Cal, the separate counts of Food Stamps and Medi-Cal presented in this report represent the additional "non-assisted" caseloads (families in which some or all members do not receive CalWORKs).

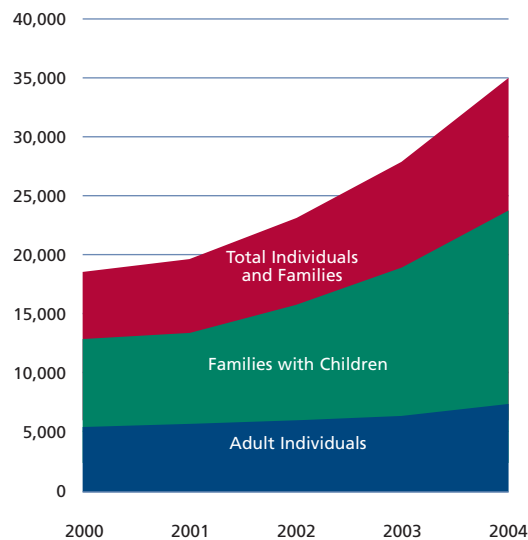
Homelessness

The number of homeless individuals and families in Orange County continues to grow, from 27,947 in 2003 to 34,999 in 2004, a 25% increase. A person is considered homeless if they have no fixed or regular nighttime residence (including motels), have received an eviction notice and have no resources for housing, or are staying in a temporary shelter or place that is not designed for housing, such as a car or garage. Families with children represent 70% of the total homeless population. Approximately 5,390 of the estimated 16,333 homeless children are ages five and under. A growing number of families live in motels because they cannot afford the high upfront costs to rent an apartment (first and last month's rent and/or a security deposit). Financial hardship also often results in bad credit which can lock families out of the county's tight rental housing market.

Rental Assistance Shortfall

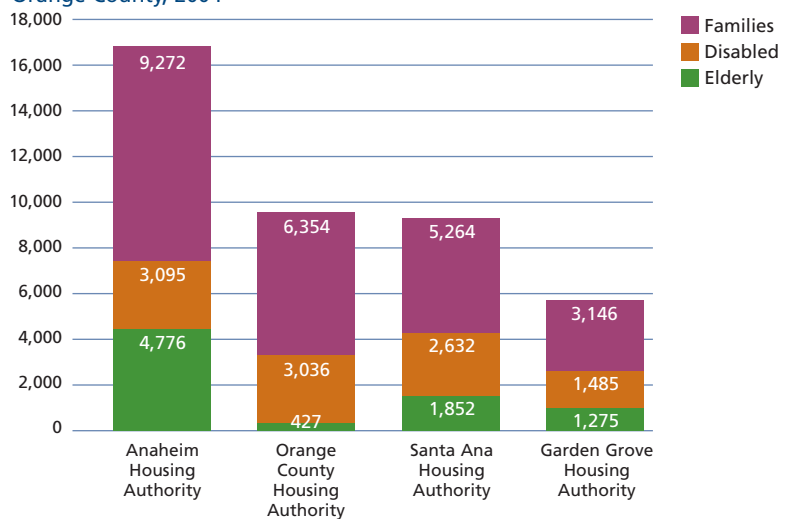
Section 8, which provides monthly rental assistance for families and individuals, is another way of providing permanent, affordable housing in Orange County. This program assists more than 20,000 households in the county, but does not have enough funds to meet the demand. The lengthy waiting list for Section 8 assistance provides a measure of the gap in affordable housing available in the county. In 2004, more than 42,000 applicants (families or individuals) were on waiting lists at the four Housing Authorities in Orange County, however several agencies have not accepted applications since 2001 and only one is accepting applications at this time. Moreover, the U.S. Department of Housing and Urban Development's new budget limitations may severely restrict or prohibit the issuance of rental assistance vouchers in 2005. For example, congressionally mandated funding cuts may require the Orange County Housing Authority to reduce the 9,600 currently assisted households to 9,000 by the end of the year, if rents and costs continue to increase. This will result in a further decline in the number of affordable housing units available in Orange County.

Estimated Number of Homeless in Orange County 2000-2004



Source: County of Orange, Housing and Community Development Department

Waiting Lists for Section 8 Housing Voucher Rental Assistance Orange County, 2004



Note: Anaheim Housing Authority continues to accept applications for its open waiting list. Santa Ana Housing Authority closed its waiting list in July 2004, and Garden Grove and Orange County Housing Authorities have not accepted applications since 2001.

Poverty

According to the Census, the percentage of Orange County children in poverty rose about 4% annually over the last four years, to 14.3% in 2003. Approximately 109,000 children in Orange County live in poverty. However, California and the United States have higher rates of child poverty, 19.0% and 17.7% respectively.

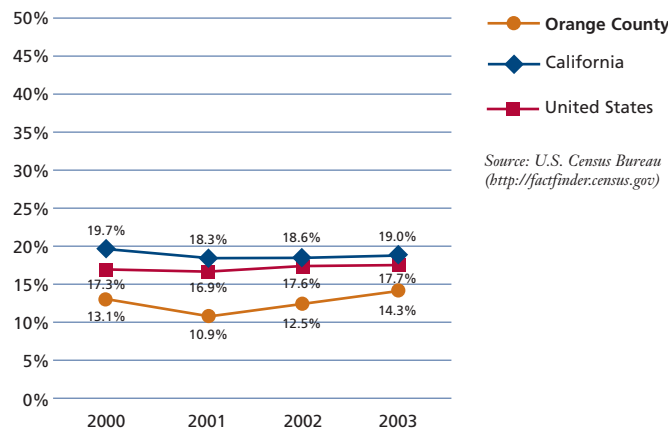
An alternative measure of family poverty is the number of children living in families with incomes low enough to be eligible for free or reduced price school lunches. A child is eligible for subsidized school meals if his or her parents' income is below 185% of the Federal Poverty Guidelines. In the past year, Orange County saw a one point decrease in the number of children eligible to participate in this program (38%). Wide disparities within the county are evident, ranging from 81% eligible in Anaheim Elementary School District to 7% in Irvine Unified School District. The variation in poverty levels among school districts correlates closely with school district variation in test scores (see Academic Performance, page 37).

Federal Poverty Guidelines (FPG) and 185% of FPG, 2004

Family Size	FPG	185%
1	\$9,310	\$17,224
2	\$12,490	\$23,107
3	\$15,670	\$28,990
4	\$18,850	\$34,873
5	\$22,030	\$40,756
6	\$25,210	\$46,639
7	\$28,390	\$52,522
8	\$31,570	\$58,405

Source: U.S. Department of Health & Human Services

Percent of Children Under 18 Living in Poverty Orange County, 2000-2003



Source: U.S. Census Bureau (<http://factfinder.census.gov>)

Percent and Number of Children Eligible for Free or Reduced Price School Meals Orange County, 2003/04†

School District	Percent	Change From Prior Year (%)
Anaheim Elementary	81%	↓
Santa Ana Unified	77%	↑
Magnolia Elementary	73%	↔
La Habra City Elementary	68%	↔
Westminster Elementary	63%	↑
Buena Park Elementary	61%	↓
Garden Grove Unified	60%	↔
Savanna Elementary	56%	↑
California	49%	↔
Centralia Elementary	46%	↑
Newport-Mesa Unified	39%	↑
Orange County Average	38%	↓
Fullerton Elementary	38%	↑
Tustin Unified	34%	↔
Orange Unified	33%	↔
Ocean View Elementary	32%	↓
Brea-Olinda Unified	18%	↔
Capistrano Unified	15%	↓
Saddleback Valley Unified	14%	↑
Huntington Beach City Elementary	13%	↓
Fountain Valley Unified	13%	↑
Cypress Elementary	12%	↑
Laguna Beach Unified	10%	↑
Placentia-Yorba Linda Unified	8%	↑
Los Alamitos Unified	8%	↓
Irvine Unified	7%	↔

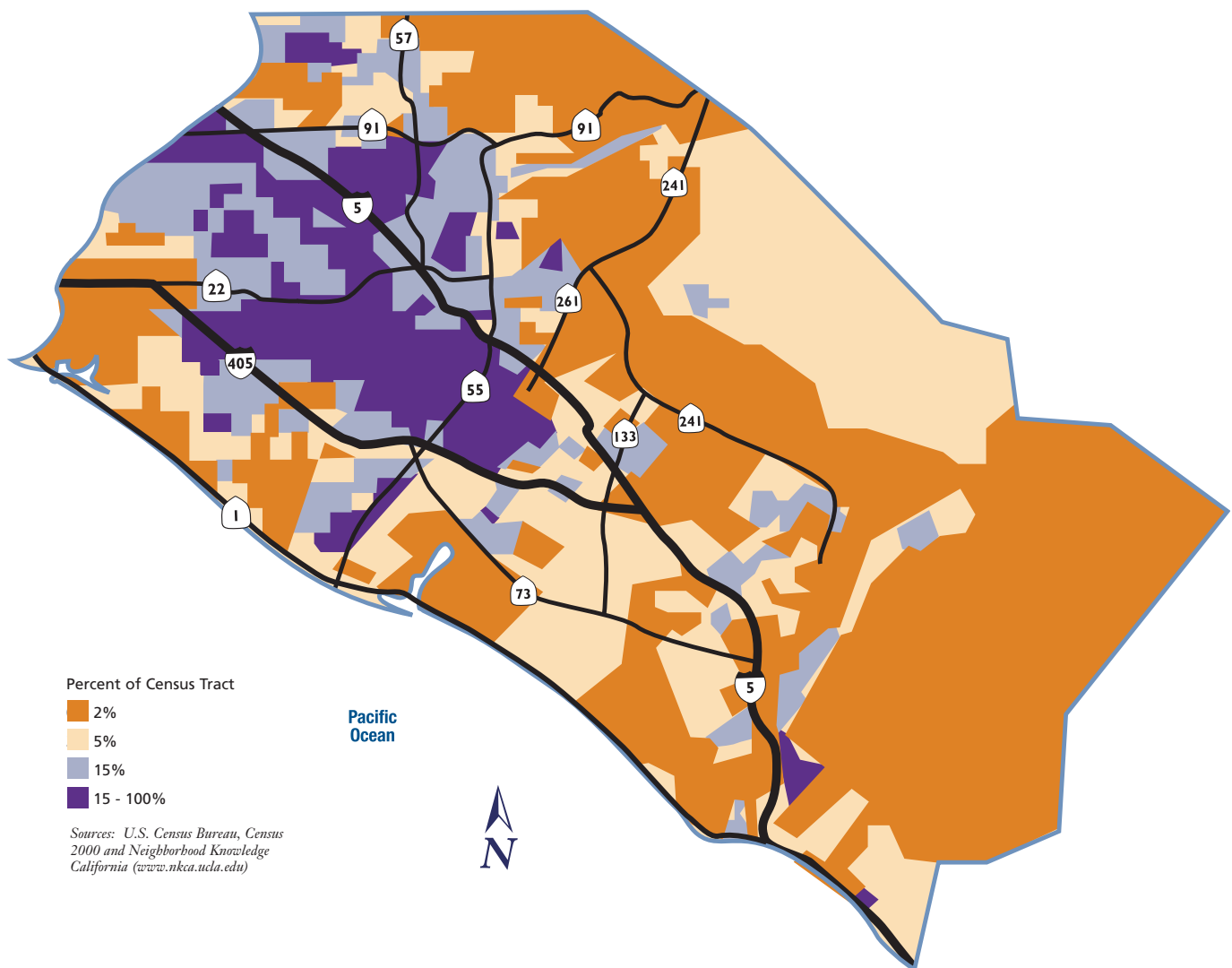
† Elementary and unified school districts only.

Source: California Department of Education, DataQuest (<http://data1.cde.ca.gov/dataquest/>)

Overcrowding

In high cost of living regions like Orange County, CalWORKs grants barely cover half of the cost to rent an appropriately-sized apartment. For example, as of July 2004 the monthly CalWORKs grant for a family of three without other income is \$723 and the median monthly rent for a two-bedroom apartment (proposed 2005 Fair Market Rent as determined by the U.S. Department of Housing and Urban Development) is \$1,403, resulting in a shortfall of \$680 per month just for rent. Even a family with a full-time minimum wage earner would spend as much as 98% of income on rent considering wages of \$1,080 a month and a CalWORKs grant of \$296 (reduced due to earned income). This scenario would leave a mere \$27 for other expenses. To survive under these constraints, families often share housing arrangements that result in overcrowded conditions which place strain on personal relationships, housing stock, and city and county services. The areas with the most overcrowding tend to be in central and northern Orange County.

**Overcrowded Housing in Orange County
More Than One and a Half Occupants per Room, 2000**



One in Seven Adults Report Needing Mental Health Help; Less than Half Receive it

Description of Indicator

This indicator measures the percentage of California, Orange County and peer county adults (18+) who indicated a need for help with an emotional or mental health problem in the past 12 months and the percentage of adults who visited a specialist for an emotional or mental health problem in the past 12 months. Also presented is time spent feeling down in the past four weeks and whether psychological counseling was received in the past 12 months for teens (12-17) in Orange County compared to California. Updated data will be available later in 2005 at www.chis.ucla.edu.

Why is it Important?

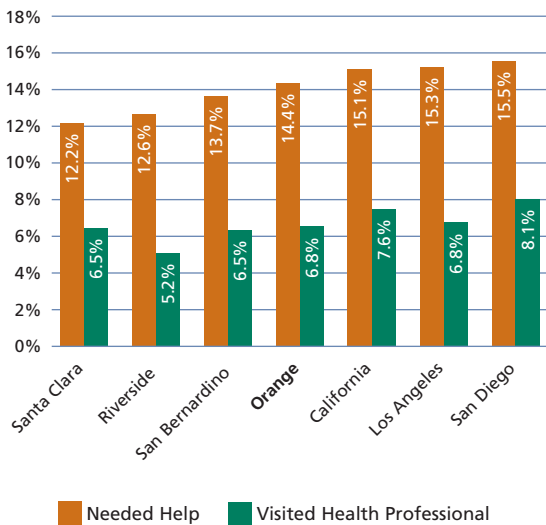
Mental health disorders often go unreported and untreated. Untreated, mental health disorders can worsen, leading to difficulties in the home and workplace, and in severe cases, suicide.

How is Orange County Doing?

Orange County adults are in the mid-range among areas compared in terms of needing help for emotional or mental problems (14.4%). Only 6.8% visited a specialist indicating a gap of 7.6% who did not seek help for their problem. Of those needing or receiving emotional or mental health care, 7% reported difficulties or delays in getting help. In 2001, of Orange County adults with health insurance coverage, 16% reported that mental health is not covered in their plan.

Most (62%) Orange County teens do not report symptoms of depression; however, 23% report being depressed a little of the time and 14% report being depressed some of the time. About 11% of Orange County youth have received psychological or emotional counseling in the past 12 months, very similar to the California rate.

Percent of Adults (18+) Needing and Receiving Help for an Emotional or Mental Problem in the Past 12 Months County Comparison, 2001



The Mental Health/Drug Abuse Connection

Nationwide, approximately 48% of the U.S. population aged 15-54 has had an alcohol, drug abuse, and/or mental disorder in their lifetime. Depressed individuals are more inclined to drink, smoke or use drugs, and more than half of individuals reporting a substance abuse problem in their lifetimes have also had mental disorders.

Source: Substance Abuse and Mental Health Services Administration (www.samhsa.gov)

Orange County Teens' (Ages 12-17) Response to:

	Most of the time*	Some of the time	A little of the time	Not at all
How much of the time during the past four weeks have you felt so down in the dumps that nothing could cheer you up?	1%	14%	23%	62%
In the past 12 months, have you received any psychological or emotional counseling?	11%	89%		

* Statistically unstable

Source: UCLA Center for Health Policy Research, 2001 California Health Interview Survey (www.chis.ucla.edu/index.html)

Alcohol and Drug Abuse Trend in Different Directions

Description of Indicator

Direct measures of substance abuse are elusive, but a variety of proxy indicators can be used to help gauge the extent of alcohol and other drug (AOD) abuse. This indicator shows trends and peer comparisons in commonly used health, criminal justice, treatment, and motor vehicle accident indicators.

Why is it Important?

A broad spectrum of public health and safety problems are directly linked with substance abuse including addiction, traffic accidents, domestic violence and other crime, unintended pregnancy, and serious diseases such as cancer, HIV/AIDS, and birth defects.

How is Orange County Doing?

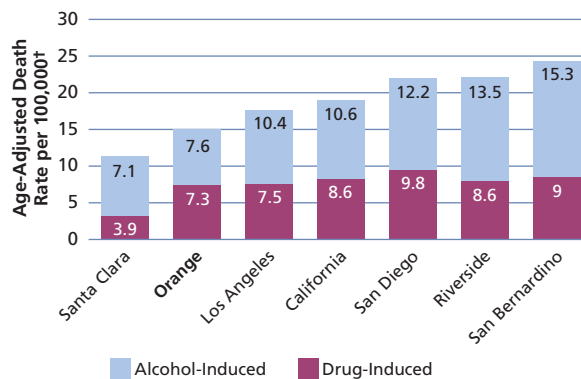
Indicators of alcohol abuse generally show encouraging movement with alcohol-induced death rates low compared to peers and treatment admissions and car accidents trending in a positive direction. Drug-induced death rates are comparable to peers but drug-related arrests and treatment admissions are trending in a negative direction.

AOD-related arrests were trending downward in Orange County and statewide until 2003, with alcohol-related arrests on the decline and drug-related arrests remaining steady. In 2003, alcohol- and drug-related arrests increased for both Orange County and California. Orange County's AOD arrest rate, typically about 200 arrests per 100,000 less than the California average, was only 50 arrests per 100,000 less than the California average in 2003.

Over the past three years, Orange County admissions for AOD recovery or treatment services at publicly funded or state licensed programs have increased significantly for drug-abuse and decreased somewhat for alcohol-abuse.

California Highway Patrol data shows that over the past five years in Orange County, alcohol-involved car accidents have been on a downward trend, owing to a slight decline in injury accidents. Fatal alcohol-involved accidents have increased somewhat but not enough to stop the overall downward trend.

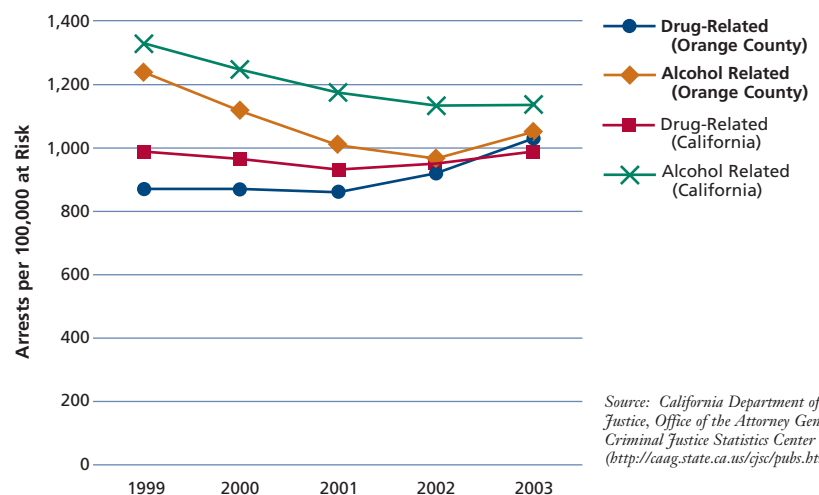
Alcohol and Drug-Induced Deaths
County Comparison, 2000-2002 Average



† Counties with varying age compositions can have widely disparate death rates since the risk of dying is mostly a function of age. To enable county comparisons, age-adjusted death rates, which control for this variability, are used rather than crude death rates.

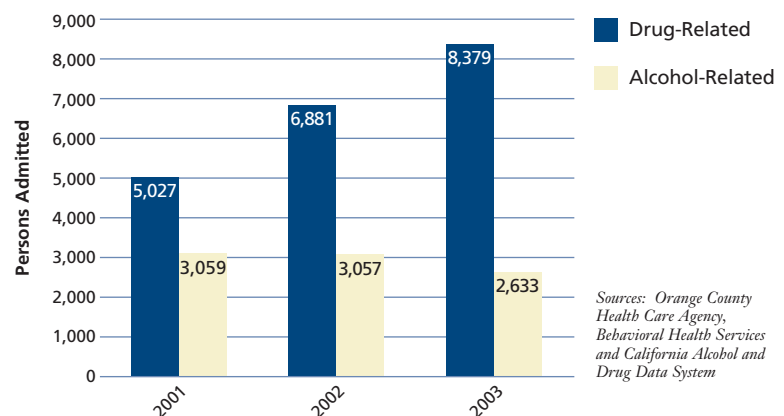
Source: California Department of Health Services, Center for Health Statistics (www.dhs.ca.gov/bisp/chs/OHIR/vsdata/Tables.htm)

Alcohol and Drug-Related Arrests
California and Orange County, 1999-2003



Source: California Department of Justice, Office of the Attorney General, Criminal Justice Statistics Center (<http://caag.state.ca.us/cjcs/pubs.htm>)

Alcohol- and Drug-Related Admissions to Publicly Funded or State Licensed Recovery and Treatment Services
Orange County, 2001-2003



Sources: Orange County Health Care Agency, Behavioral Health Services and California Alcohol and Drug Data System

Lung Cancer Meets Health Goal; Over 8,000 AIDS/HIV Cases

Description of Indicator

This indicator measures the health status of the Orange County population compared to the state using mortality rates (age-adjusted deaths per 100,000 people) and morbidity rates (cases per 100,000 people) and shows the county's progress toward achieving Healthy People 2010 National Objectives.¹ Also shown is whether Orange County's rates improved or worsened from the previous year and how Orange County ranks among all 58 California counties (a rank of one is best).

Why is it Important?

Viewing Orange County in relation to statewide averages and national health objectives helps identify public health problems that are comparatively more (or less) pronounced in Orange County and can inspire new public health initiatives to address problems.

How is Orange County Doing?

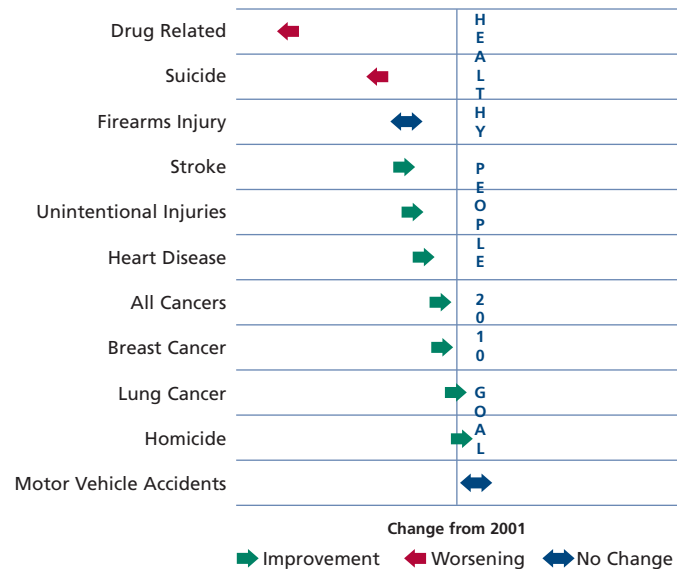
Orange County continues to achieve the Healthy People 2010 goal for deaths due to homicide and motor vehicle accidents and reached the goal for lung cancer for the first time. For the remaining commonly measured health status indicators the county did not achieve the national objectives. Deaths due to breast cancer (23.6 per 100,000) are the closest to reaching the Healthy People 2010 goal of 22.3 per 100,000, while drug-related deaths (7.3 per 100,000) are furthest away from the goal of one per 100,000. Most of the causes of death showed improvement in the last year. Heart disease continues to improve sizably each year, but it remains the leading cause of death for Orange County residents and among all 58 California counties, Orange County ranks close to the bottom in deaths due to heart disease (52nd). For four years in a row, more Orange County residents died of cancer, stroke, and heart disease than the average Californian.

Orange County Age-Adjusted Death Rates Compared to the California Average, 2002[†]

Rank	Cause of Death	County's Rate is Better than California Average
6	Unintentional Injuries	✓
8	Motor Vehicle Accidents	✓
9	Firearms Injury	✓
14	Suicide	✓
15	Lung Cancer	✓
16	Drug-Related	✓
20	Homicide	✓
29	Breast Cancer	✓
31	All Cancers	
31	Diabetes	✓
45	Stroke	
52	Heart Disease	

[†] Ordered by Orange County's rank among California counties (one is best, 58 is worst).

Age-Adjusted Death Rates: Progress Towards Healthy People 2010 Goals Orange County, 2002



Source: California Department of Health Services, County Health Status Profiles (www.dhs.ca.gov/bisp/cbs/OHIR/)

AIDS/HIV in Orange County, 2003

	Number of Cases	Percent Not Receiving Medical Care	
Known AIDS Cases as of December 31, 2003	3,104	43%	HIV infection case data is newly available from the County of Orange Health Care Agency. It is provided in combination with the cumulative AIDS case rate and other detailed measures to more accurately show the HIV/AIDS burden in Orange County. Comparison with California Department of Health Services data is not provided since the state tracks AIDS but not HIV cases.
Known HIV Cases as of December 31, 2003	3,725	75%	
Estimated Number of People Living with HIV but Don't Know it	1,230	100%	
Total	8,059	66%	
Growth in Latino AIDS Cases between 1997 and 2003	16%		
Growth in Female AIDS Cases between 1997 and 2003	30%		
Number of Newly Diagnosed AIDS Cases in 2003	162		
Case Rate Among Ages 13 and Over	7 per 100,000		
Healthy People 2010 Case Rate Goal	1 per 100,000		

Source: County of Orange Health Care Agency, HIV/AIDS Surveillance & Monitoring Program

¹ Counties with varying age compositions (e.g. a county with a large population of elderly vs. a county with a large population of children) can have widely disparate death rates since the risk of dying is mostly a function of age. To enable county comparisons, age-adjusted death rates, which control for this variability, are used rather than crude death rates. The data is comprised of three-year averages (2000-2002).

Most Older Adults Safe, Healthy and Financially Stable

Description of Indicator

This indicator measures the status of Orange County older adults (65 years of age and over) through economic, crime, and health measures. An updated self-assessment of health status will be released in early 2005 at www.chis.ucla.edu/main/default.asp.

Why is it Important?

Due to increasing longevity and the retirement of the Baby Boom generation, the number of older adults in Orange County is expected to rise significantly. Older adults' economic and physical wellbeing not only impacts themselves, but also their families and demand for services.

How is Orange County Doing?

Economic

In 2003, the U.S. Census Bureau estimates median household income for older adults was \$37,066, less than the county median household income of \$60,118. Approximately 5.4% of Orange County older adults had incomes below the poverty thresholds for older adults in 2003, although assets like real estate are not figured in this estimate. Fully 80% of Orange County older adults own their own home, compared to 57% of the general population.

Crime

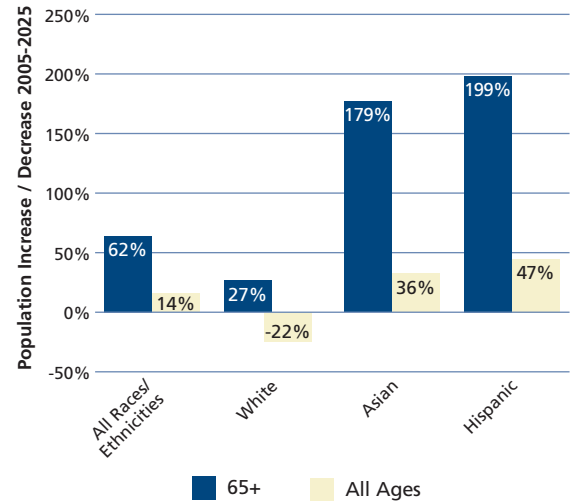
Orange County's rate of violent crime against older adults is the second lowest among peers. However, the county has the second highest five-year average growth in crime compared to peers. Aggravated assault and robbery were the most common crimes. Elder abuse reported to the County of Orange Social Services Agency (SSA) decreased slightly in the past two years, but on average, there has been a 3% increase annually over the last five years (1999/00 to 2003/04).¹ Adult abuse includes self-neglect (the most common form of abuse) and abuse by others (most likely a family member or friend) such as neglect or financial, physical, or emotional abuse.

Health

Slightly more Orange County older adults consider themselves in excellent health than the California average. Most Orange County older adults rate their health as very good or good (57.0%). Orange County older adults also were less likely to rate themselves in poor health (8.8%) than the California average (11.0%). Those in poor health often need assistance with daily living. The number of older adults receiving In-Home Supportive Services through SSA increased 6% from June 2003 to June 2004 (from 6,589 to 6,974).

Six percent of Orange County older adults reported needing help with mental or emotional problems in the past 12 months, compared to 14% of the Orange County adult population.² However, older adults often underreport depression or emotional problems. An alternative method of assessing emotional wellbeing is to survey for the occurrence of stressful life events like losing a spouse (severe life stressor) or stopping driving (modest life stressor). The 2002 Orange County Health Needs Assessment found that 27% of older adults reported seven or more stressful life events in the previous year, increasing their chances of depression or serious illness.

Projected Change in Older Adult Population Compared to All Ages, by Race/Ethnicity
Orange County, 2005-2025



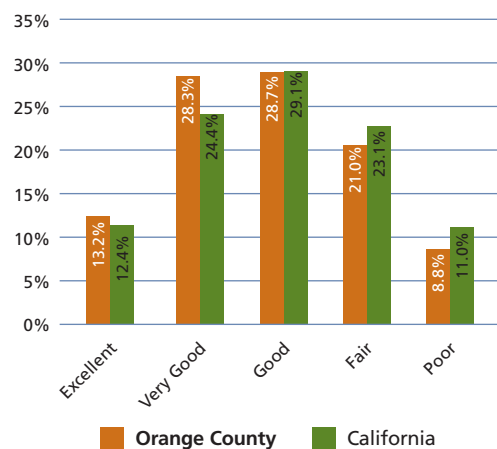
Source: California State University, Fullerton, Center for Demographic Research, Orange County Projections 2004

Violent Crime Against Older Adults
County Comparison

County	Rate per 100,000 Persons Over 65 (2003)	County	Five-Year Average Annual Percent Change (1999-2003)
Los Angeles	456	Riverside	11%
California	222	Orange	10%
Riverside	177	Los Angeles	7%
San Bernardino	156	California	5%
San Diego	132	San Bernardino	5%
Orange	79	Santa Clara	-1%
Santa Clara	74	San Diego	-4%

Sources: California Department of Justice, Criminal Justice Statistics Center and U.S. Census Bureau, 2003 American Community Survey

Self Assessment of Health Status by Orange County and California Adults Ages 65+, 2003



Source: University of California, Los Angeles, Center for Health Policy Research, California Health Interview Survey

¹ Adult abuse data presented in previous Community Indicators reports included reports of abuse to dependent adults as well as older adults. This year only abused older adults are reported.

² University of California, Los Angeles, 2001 California Health Interview Survey

County Has More Uninsured than State Average

Description of Indicator

This indicator measures health insurance coverage in the past year in Orange County, peer counties, and California. Orange County detail is provided by racial and ethnic breakdown, age, and the most frequently cited reasons for being uninsured.

Why is it Important?

Access to quality health care is heavily influenced by health insurance coverage. Because health care is expensive, individuals who have health insurance are more likely to seek routine medical care and to take advantage of preventive health screening services than those without such coverage – resulting in a healthier population and more cost-effective health care.

How is Orange County Doing?

In 2003, 77.4% of Orange County residents indicated they were insured the entire past year and 14.2% indicated they were not insured any time in the past year. Orange County falls in the middle of the counties compared for the rate of insured, but falls just behind Los Angeles for the highest percentage of uninsured residents.

Young children have the highest rate of health insurance coverage but still 10.9% were either uninsured in the past 12 months or have insecure coverage (only covered part of the year). Young adults have the lowest rate of coverage, although it has improved since 2001. Coverage rates vary significantly by race and ethnicity. Almost one-third of Orange County Latinos are uninsured (30.1%) compared to 11.3% of Asians and 6.1% of Whites.

As adult residents age they appear to have greater opportunities, financial means, or motivation for obtaining health insurance coverage. In Orange County, 64.3% of 18-24 year olds are insured versus 74.6% of 25-64 year olds. According to 2001 data, the primary reason cited by those who do not have coverage was that it was too expensive and they could not afford it (42.1%). The second and third most common reasons for lack of coverage were due to changing or losing jobs (12.2%) and feeling healthy and therefore having no need for it (8.9%).

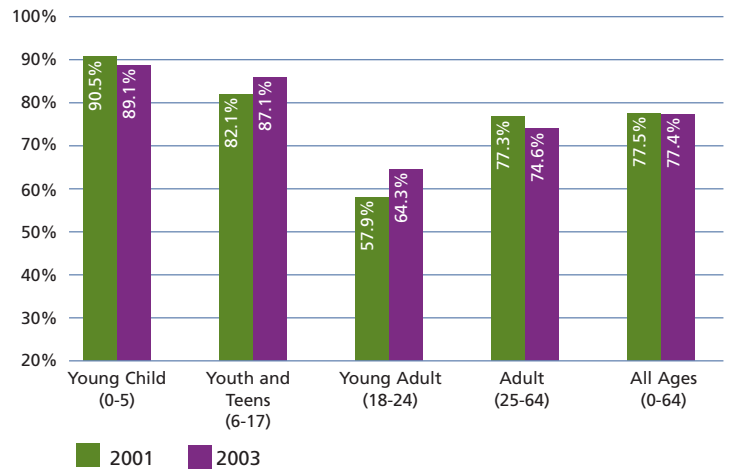
Not Insured Any Time in Past Year by Ethnicity Orange County, 2001 and 2003

	2001	2003
Latino	24.5%	30.1%
Asian	14.3%	11.3%
White	4.6%	6.1%

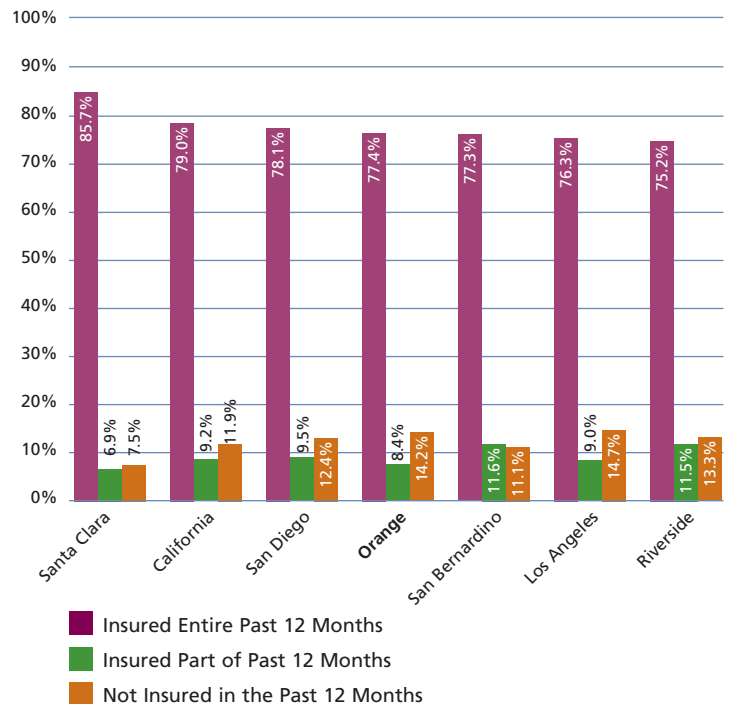
Note: Due to small samples, the data for Pacific Islanders, African Americans, Native Americans/Alaskan Natives and other or mixed races is unstable and thus not provided.

Source: University of California, Los Angeles, Center for Health Policy Research, California Health Interview Survey, 2001 (www.chis.ucla.edu/index.html)

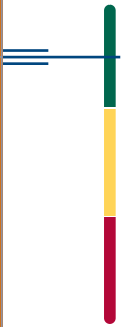
Insured Entire Past Year by Age
Orange County, 2001 and 2003



Health Insurance Coverage
County Comparison, 2003



Public Safety



Orange County is a **safe** place to live, with comparatively **low crime** rates, low domestic violence and decreasing gang activity.



Foster Care Unchanged; Domestic Violence Calls Rise Slightly

Description of Indicator

This indicator measures family violence by tracking child abuse and neglect and domestic violence.

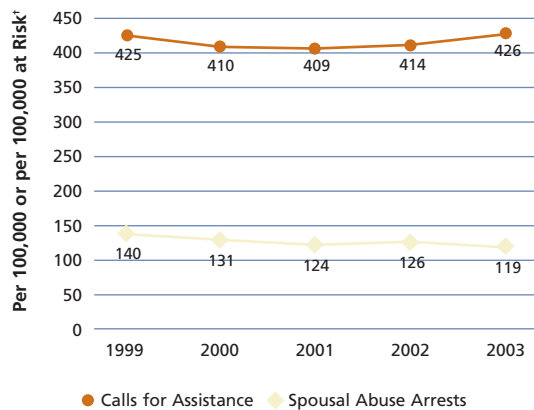
Why is it Important?

Foster care placement is often the final act to protect children from dangerous circumstances after repeated attempts to stabilize their families. Tracking reentries into foster care shows whether children are being prematurely returned to abusive family situations. The gap between domestic violence-related calls for assistance and actual spousal abuse arrests shows the challenge law enforcement faces prosecuting these crimes, as victims recant or evidence is lacking.

How is Orange County Doing?

In the past five years, the number of Orange County children entering foster care for the first time has fluctuated around the five-year average of 2.1 per 1,000 children. Among peers, Orange County has a comparable rate of substantiated referrals, but the lowest rate of children removed from their homes. This may be attributable to the fact that, whenever possible, the County provides services to families that allow children to safely remain at home with their families. About 6% of Orange County children re-enter foster care within a year of returning home, the lowest level among peers, suggesting that Orange County is more successful at preventing re-abuse among these families. Domestic violence calls for assistance are trending upward while spousal abuse arrests are trending downward. The increase in calls may reflect more victims willing to come forward as a result of public education and growing opportunities for protection. Among peers, Orange County has the second-lowest level of calls for assistance and the lowest level of spousal abuse arrests.

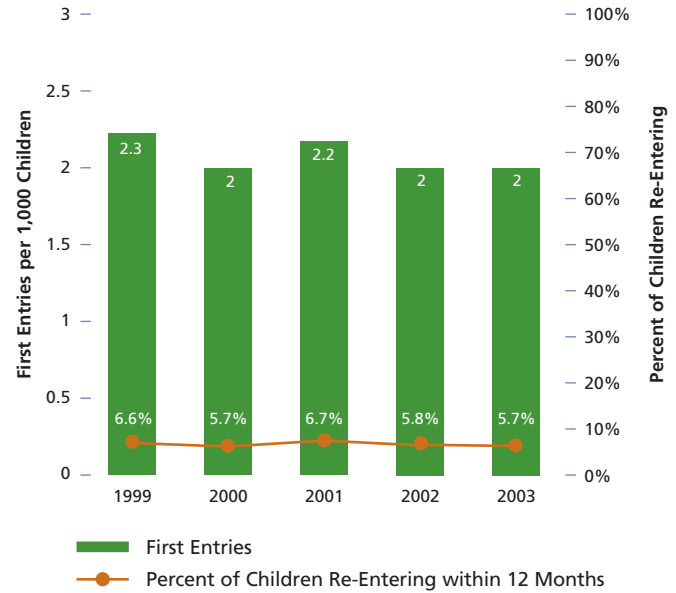
Domestic Violence-Related Calls for Assistance and Spousal Abuse Arrests Orange County, 1999-2003



† Calls for assistance per 100,000 are calculated using the total population. Spousal abuse arrests per 100,000 are calculated using the total population at risk, 10-69 years of age.

Source: California Department of Justice, Criminal Justice Statistics Center (<http://caag.state.ca.us/pubs.htm>)

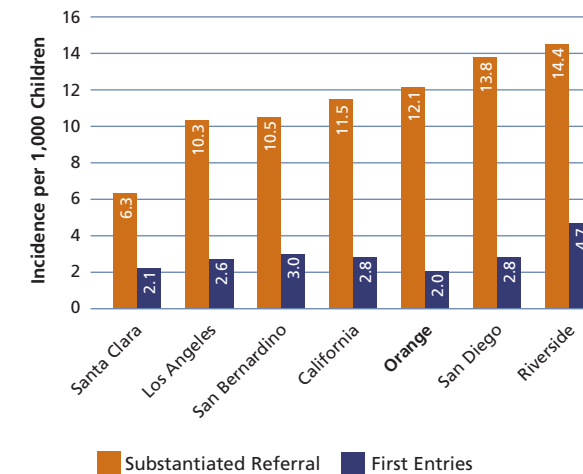
Foster Care Entries and Percent of Children Re-Entering within 12 Months Orange County, 1999-2003



Note: First entry data reflect calendar years; re-entry data reflect October through September. Re-entries are not a subset of first entries; rather, they are the percent of children who re-entered after reuniting with their families.

Sources: University of California Berkeley, Center for Social Services Research, Child Welfare Research Center (<http://cssr.berkeley.edu/cbildwelfare/>) and County of Orange Social Services Agency

Substantiated Child Abuse Referrals and First Entries to Foster Care County Comparison, 2003



Source: University of California Berkeley, Center for Social Services Research, Child Welfare Research Center (<http://cssr.berkeley.edu/cbildwelfare/>)

Despite Rise in Felony Arrests, Overall Juvenile Crime Continues Downward Trend

Description of Indicator

This indicator uses arrests as a means of measuring juveniles' participation in felony and misdemeanor crimes, compared to adults and peer counties. Juveniles are persons under 18 years of age. Felonies include crimes such as murder, assault, rape, robbery, burglary, and more serious drug offenses. Misdemeanors include crimes such as assault and battery, prostitution, petty theft, vandalism, driving while intoxicated, and less serious drug offenses.

Why is it Important?

Tracking juvenile arrests helps the community understand the level of major and minor crime in Orange County and the extent that youth contribute to that crime. While youths make up a small portion of overall arrests, criminal justice experts argue that intervening early with at-risk youth can help reduce criminal activity in their adult lives.

How is Orange County Doing?

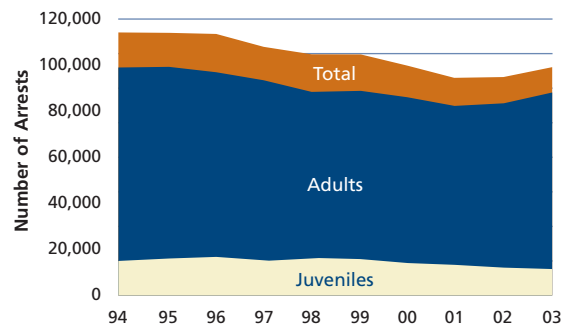
In 2003, juveniles made up 12% of all arrests. Out of those 11,556 arrests, most (69%) were misdemeanors. Despite a small rise in juvenile felony arrests for the first time since 1995, the overall rate of juvenile arrests (both felonies and misdemeanors) per 100,000 youth has decreased an average of 6% each year over the past 10 years. Among peer counties, in 2003 juvenile felony arrests decreased in all counties except Orange, Santa Clara and San Bernardino Counties. Juvenile misdemeanor arrests decreased in all counties except Santa Clara. Orange County has the lowest rate of juvenile felony crime among the counties compared and only Los Angeles and Riverside Counties have lower rates of misdemeanor crime than Orange County.

School Crime

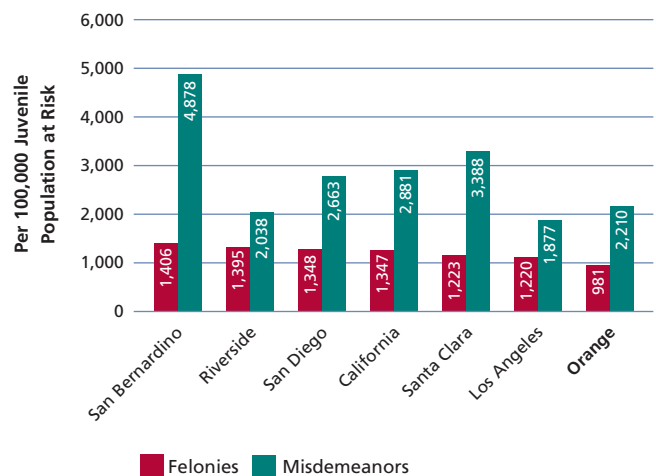
Students are mandatorily expelled from school for bringing a firearm, brandishing a knife, selling a controlled substance, committing sexual assault, or possessing an explosive on campus or at a school activity. In Orange County, 75 students were mandatorily expelled in 2002/03, down from 95 in 2001/02 and 80 in 2000/01. Compared to peers, Orange County has a considerably lower rate of mandatory expulsions.

Source: California Department of Education, DataQuest (<http://data1.cde.ca.gov/DataQuest/>)

Felony and Misdemeanor Arrests, Adults and Juveniles Orange County, 1994-2003



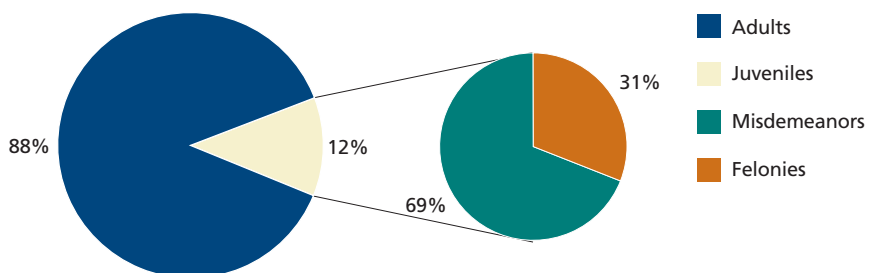
Juvenile Felony and Misdemeanor Arrests County Comparison, 2003



Note: The juvenile population at risk is 10-17 years of age.

Source: California Department of Justice, Criminal Justice Statistics Center (<http://caag.state.ca.us/cjisc/>)

Total Adult and Juvenile Arrests and Proportion of Juvenile Arrests that are Felonies or Misdemeanors Orange County, 2003



Source: California Department of Justice, Criminal Justice Statistics Center (<http://caag.state.ca.us/cjisc/>)

Orange County Has Low Crime Rate

Description of Indicator

This indicator uses the California Crime Index and the FBI Crime Index to compare crime rates among counties and to track crime rate trends from 1999 to 2003.¹ The indices measure reported violent and property felonies per 100,000 people. Violent crime includes homicide, forcible rape, robbery, and aggravated assault. Property crime includes burglary and auto theft. The FBI Index includes all these plus larceny-theft and arson.

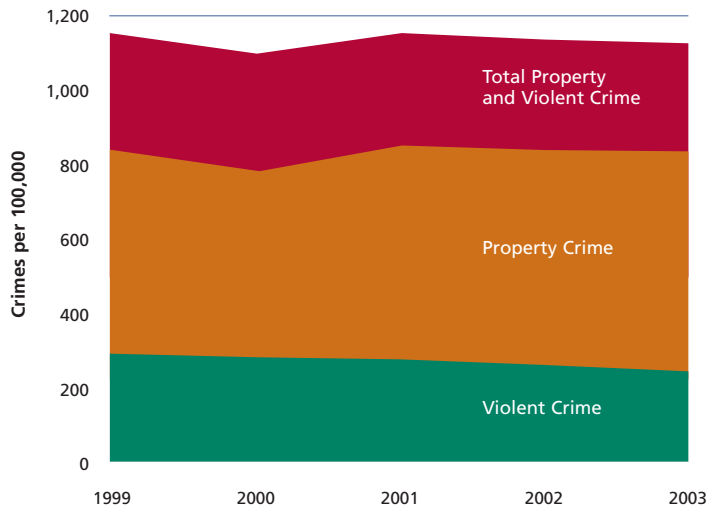
Why is it Important?

Crime impacts both real and perceived safety in a community. Nationwide, after peaking in the early 1990's, crime has decreased significantly. In the new millennium, violent crime in California continues its downward trend but property crimes are inching upward again. Crime impacts groups differently within the county. For instance, Latino residents are far more likely to rate crime as one of the biggest problems facing Orange County (9%) than white residents (2%).²

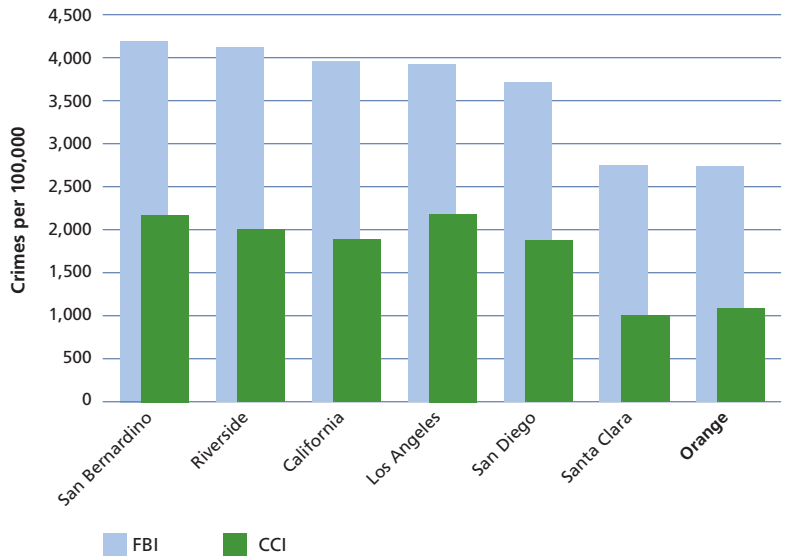
How is Orange County Doing?

Orange County's California Crime Index dropped from 1,117 crimes per 100,000 in 1999 to 1,082 crimes per 100,000 in 2003 driven by a decrease in violent crime. Orange County has the lowest FBI Crime Index value of all the counties compared (2,734 crimes per 100,000) and the second lowest California Crime Index (1,082 per 100,000). One out of 92 Orange County residents was a victim of a violent or property crime in 2003. Violent crimes make up 25% of the total number of crimes.

California Crime Index
Orange County, 1999-2003



California Crime Index (CCI) and FBI Index
County Comparison, 2003



Source: California Department of Justice, Office of the Attorney General, Criminal Justice Statistics Center (<http://caag.state.ca.us/cjsc/>)

¹ The Orange County Sheriff's Department and its contract cities experienced unintended under-reporting of Part 1 crimes (violent and property crimes plus larceny-theft and arson) for 2000, 2001, and 2002. Therefore, data collected in these time periods should not be used to make comparisons.

² Public Policy Institute of California Statewide Survey: Special Survey of Orange County, 2004

Gang Activity Decreases

Description of Indicator

This indicator measures gang-related crime filings and homicides. Also measured are the numbers of identified gang members and the number of identified gangs in Orange County. For additional information, the 2003 Gang Report from the County of Orange Office of the District Attorney is available at www.ocgov.com/da/docs/gang2003all.pdf.

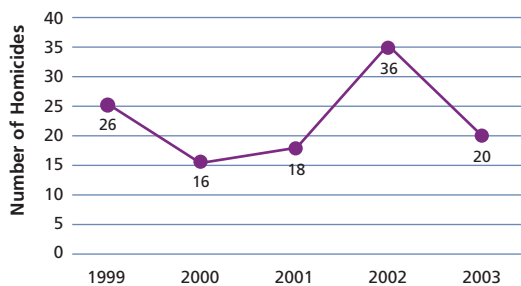
Why is it Important?

Over the past few years, due to public demand, significant resources have gone toward existing anti-gang units and the development of new units to reduce gang-related crime in Orange County. This indicator can help the community gauge the effectiveness of these programs and help determine future needs.

How is Orange County Doing?

Gang-related homicides fell to 20 in 2003, well below the 10-year average of about 40. The number of gangs remained somewhat steady, rising less than 1%, but the number of gang members dropped significantly in 2003, falling 19% in one year. This is most likely due to the fact that gang members are removed from the state database if they have not had contact with law enforcement for more than five years. The fact that new gang members have not replaced them in the database is a positive development. As the number of gang members has declined over the past five years, so have filings against gang-affiliated defendants.

Victims of Gang-Related Homicides
Orange County, 1999-2003



Source: County of Orange Office of the District Attorney

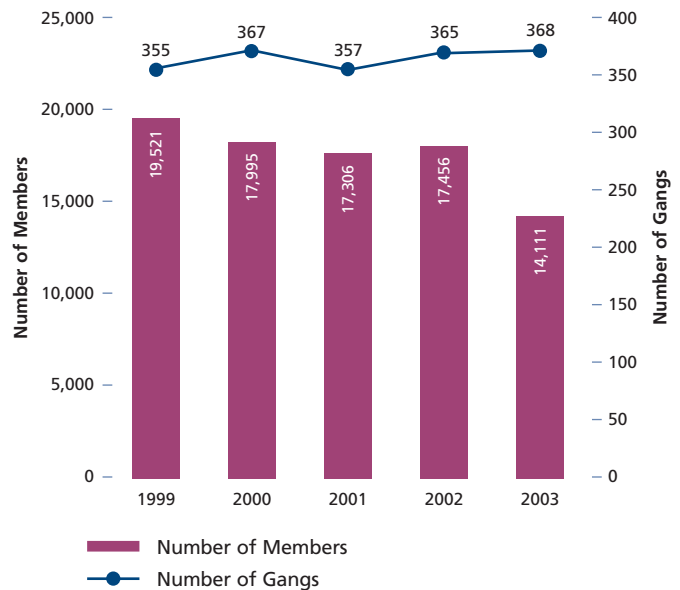
Filings Against Gang Defendants
Orange County, 1999-2003



Note: Improved data access and analysis allows for a new presentation of filings data for gang-related crimes. The past five years of data have been updated and supercede data presented in previous Community Indicators reports.

Source: County of Orange Office of the District Attorney

Gangs and Gang Membership
Orange County, 1999-2003



Note: The number of gangs has been adjusted from 404 in 1999, as published in previous Community Indicator reports, to 355.

Sources: County of Orange Office of the District Attorney and CalGangs

What is a Filing?

A filing is a document filed with the municipal court clerk or county clerk by a prosecuting attorney alleging that a person committed or attempted to commit a crime.

Source: California Department of Justice, Office of the Attorney General

Gang Membership

Law enforcement agencies, using a detailed set of criteria, submit information on gang members to the CalGangs database.

Source: County of Orange Office of the District Attorney

Hate Crime Remains at Comparatively Low Level

Description of Indicator

This indicator measures the number of reported hate crime incidents and the number of hate crime-related cases filed in court in Orange County. When bias against another person's race, religion, disability, sexual orientation or ethnicity drives a criminal act, the offense is classified as a hate crime.

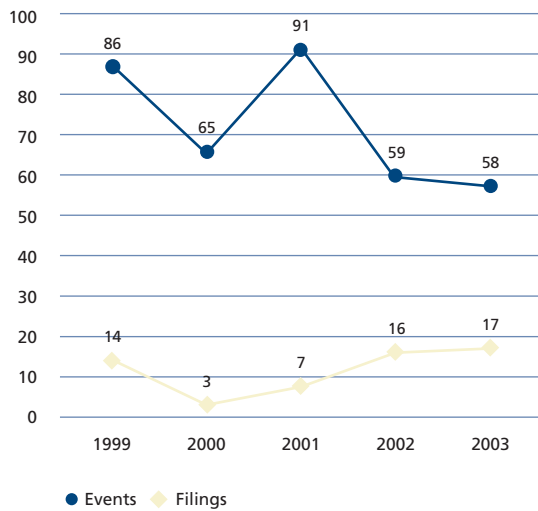
Why is it Important?

Hate crimes are among the most threatening crimes because the perpetrator views his or her victim as lacking full human worth due to their skin color, language, religion, sexual orientation, or disability. In addition, a hate crime impacts the entire group to which the victim belongs, spreading concern throughout the community.

How is Orange County Doing?

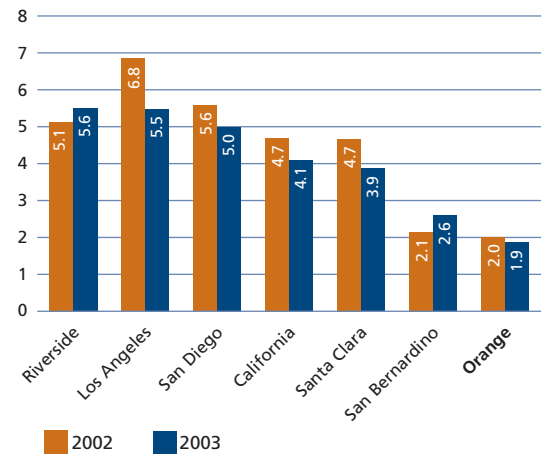
Reported hate crime events in Orange County remained at their comparatively low level, dropping by one event in 2003. In 2003, there were 58 hate crime events and 67 victims. The number of hate crime-related cases filed in criminal court increased to 17 in 2003. In 2003, all completed cases won convictions. With the exception of Riverside and San Bernardino Counties, most counties witnessed decreases in the number of hate crime events per 100,000 in 2003.

Reported Hate Crime Events and Hate Crime-Related Filings
Orange County, 1999-2003



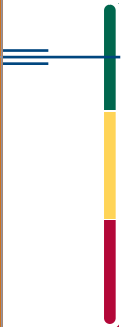
Source: California Department of Justice, Criminal Justice Statistics Center, Hate Crime in California Report, 1999 - 2003 (<http://caag.state.ca.us/cjisc/>)

Reported Hate Crime Events per 100,000
County Comparison, 2002 and 2003



Sources: California Department of Justice, Criminal Justice Statistics Center, Hate Crime in California Report, 2002-2003 (<http://caag.state.ca.us/cjisc/>) and California Department of Finance, Table E-2, (www.dof.ca.gov/)

Environment



Beach closures are at their lowest in five years, there are more parks and trails, waste collection and recycling rates improve, and there are more days of good air quality. Sewage spills have increased 233% over the past 10 years, suggesting an aging infrastructure and increased need for pipeline maintenance.

Closures at Lowest in Five Years; Sewage Spills Remain High

Description of Indicator

This indicator measures the number of beach mile days of postings and ocean water closures, as well as the causes for closures, and the number of unauthorized waste discharges (sewage spills), excluding tertiary recycled water discharges. For additional information, visit www.ocbeachinfo.com.

Why is it Important?

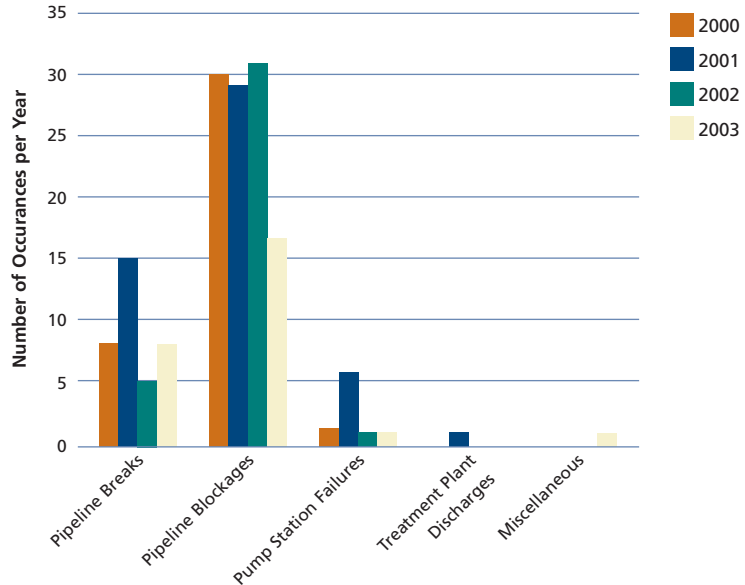
Unhealthful coastal conditions negatively impact beachgoers, beach businesses and the marine environment. When ocean waters are closed, tourists and local beachgoers are discouraged from visiting Orange County's beaches, resulting in less consumer traffic in the beach communities and diminishing our overall sense of quality of life. Pollutants enter the ocean through urban runoff, spills and dumping, exposing marine life to toxic substances and degrading habitats.

How is Orange County Doing?

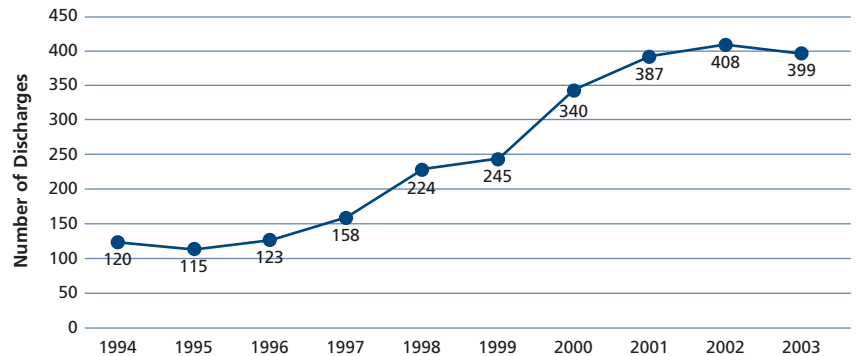
Beach mile days lost due to ocean water closures dropped by half in 2003 to the lowest number in five years, while the number of sewage spills remains high despite the first fall in numbers since 1995. Pipeline blockages, which result in unauthorized waste discharges, remain the primary cause of beach closures. By state law, ocean waters must be closed when sewage has been spilled into streams, creeks, and rivers that discharge into recreational ocean waters. The number of reported sewage spills increased 233% over the past 10 years. Possible causes for the increase include: an aging sewer infrastructure, a need for increased pipeline maintenance, increased reporting by sanitation district or city staff of spills in their jurisdiction (including small private property owner spills), or a combination of the above. Despite the numerous spills, they have not been severe enough to warrant large-scale and long-term closures as in previous years.

In addition to beach closures, the County of Orange Health Care Agency is required by state law to post warning signs (referred to as a "posting") when the water quality exceeds state standards. The number of beach mile days of postings fell 15% in the last year to the lowest number on record (2000 was the first full year of postings). Poor water quality leading to postings is largely attributed to urban runoff.

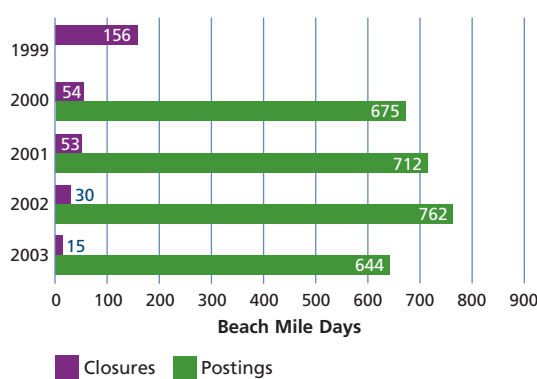
Ocean Water Closure Causes
Orange County, 2000-2003



Unauthorized Waste Discharges
Orange County, 1994-2003



Ocean Water Closures and Postings
Orange County, 1999-2003



What are Beach Mile Days?

Beach mile days are calculated by multiplying the number of days of closure or posting by the number of miles of beach closed or posted. This method of counting is an improvement over the previous method that did not take into account the amount of beach affected by the closure or posting. Orange County started using beach mile days beginning in 1999 for closures and in 2000 for postings.

Source: County of Orange Health Care Agency

Park and Trail Miles Continue to Increase

Description of Indicator

This indicator measures the change in acres of regional parks and regional hiking, biking, and riding trails from 2000 to 2004.

Why is it Important?

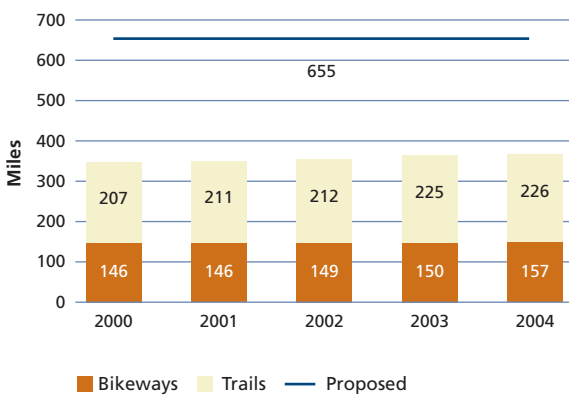
Orange County's parks, trails and beaches contribute to a high quality of life. They provide a variety of recreational opportunities and offer relief from the urban environment. Measuring acreage and mileage change enables residents to track the County's progress in preserving open space and providing regional trail linkages. As Orange County becomes increasingly dense and built out, open space resources will become even more valuable to residents.

How is Orange County Doing?

Between October 2003 and 2004, 6.75 miles of off-road paved bikeway and 0.5 miles of unpaved regional trail were added to the County's system of trails for a total of 382.4 miles combined. The County of Orange General Plan states 80% of the 655 proposed miles (303 miles of bikeway and 352 miles of trail) should be completed by 2010. This equates to a total goal of 524 miles (or 242 miles of bikeway and 282 miles of trail) by 2010.

As of October 2004, there were 38,694 acres of County regional parkland, an increase of 1,501 over the previous year. The number of acres of parks per resident has increased steadily for the past three years. A majority of the new acres are within Limestone-Whiting and Laguna Coast Wilderness Preserves. Federal, state, local and city parks further add to recreational options for residents. The Orange County portion of the Cleveland National Forest alone provides nearly 55,000 acres of open space. These resources, combined with the 42 miles of beach in Orange County, make up the regional recreational resources available to all Orange County residents and visitors.

Miles of County Regional Bikeways and Trails, 2000-2004



County Regional Parks, 2000-2004



Sources: County of Orange Resources & Development Management Department/Harbors, Beaches and Parks and California Department of Finance

Note: Includes wilderness and nature preserves and properties that have been irrevocably offered (but not currently owned by the County).

Household Hazardous Waste Collection and Recyclables Diversion Improve

Description of Indicator

This indicator measures: the annual tonnage of solid waste (commercial and household) deposited in Orange County landfills, the percent of waste diverted from landfills by jurisdictions in Orange County, the pounds of household hazardous waste collected (such as oil, paint, and batteries) and the number of annual participants, and commercial and household daily disposal rates among peer counties.

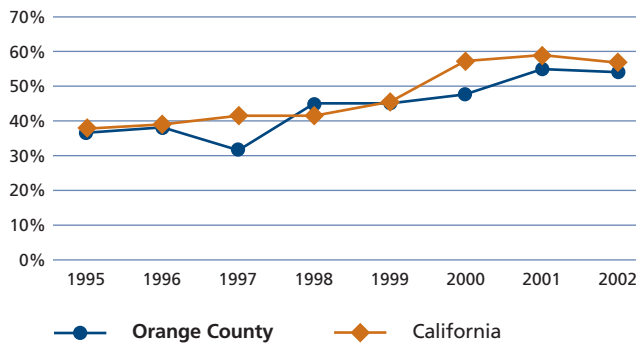
Why is it Important?

Reducing waste production and diverting recyclables and green wastes from landfills extends the life of landfills, decreases the need for costly alternatives, and reduces environmental impact. Collection of household hazardous waste helps protect the environment by reducing illegal and improper hazardous waste disposal.

How is Orange County Doing?

Waste generated in the county and disposed in County landfills in 2003 rose by about 144,000 tons for a total of 3.8 million tons. On average, since 1994 waste originating in Orange County has increased only 0.5% annually, slower than average annual population growth over the same period (1.6%). Diversion rate monitoring since 1995 shows a fairly steady increase in diversion rates countywide, tracking close to the California average.¹ In 2003/04, the number of pounds of household hazardous waste collected (5.79 million) and the number of annual participants bringing the waste to regional collection centers (81,518) increased by 31% and 19%, respectively, since the previous year. Among peer counties, Orange County has one of the highest daily resident disposal rates and one of the lowest daily commercial disposal rates.

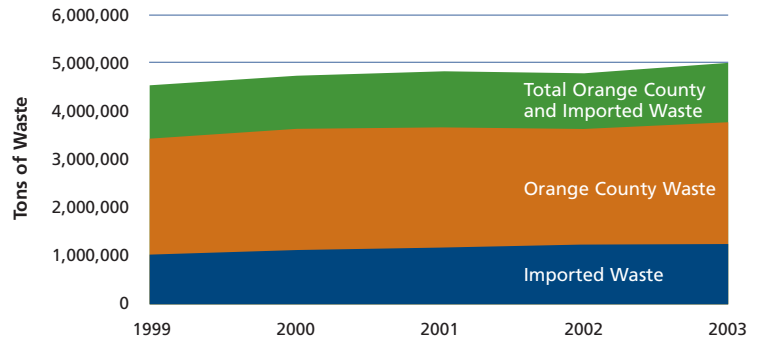
Average Diversion Rates
Orange County and California, 1995-2002



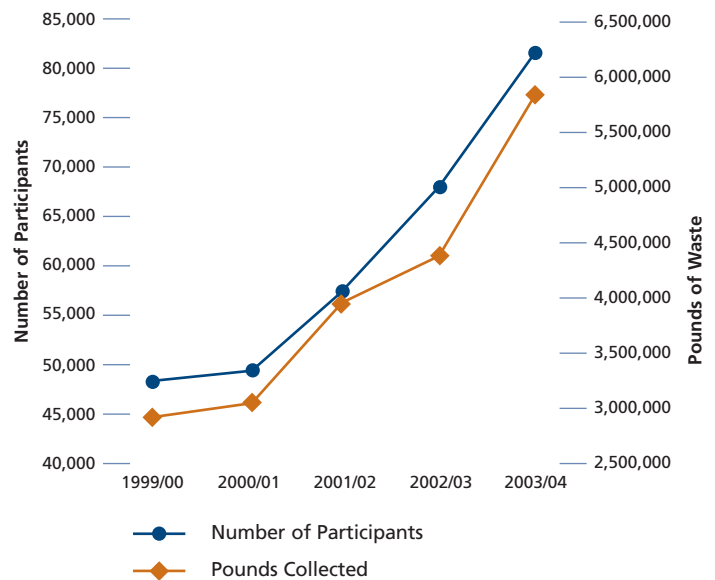
Note: Only California Integrated Waste Management Board approved rates are included in the averages. Averages for 2001 and 2002 are preliminary.

Source: California Integrated Waste Management Board (www.ciwmb.ca.gov/Profiles/)

Solid Waste Disposal in Orange County Landfills, 1999-2003



Pounds of Household Hazardous Waste Collected and Number of Participants
Orange County, 2000-2004



Source: County of Orange Integrated Waste Management Department

Disposal Rates
County Comparison, 2002

	Resident Daily Disposal	Employee Daily Disposal	Percent of Total Wastestream That is:	
			Household	Commercial
Santa Clara	1.2	6.3	26%	74%
Riverside	1.8	14.3	29%	71%
Los Angeles	2.0	10.9	30%	70%
San Diego	2.3	11.4	32%	68%
Orange	2.3	9.6	34%	66%
San Bernardino	2.7	9.9	46%	54%

Note: Calculated as pounds per resident per day (household waste) or pounds per employee per day (commercial waste).

Source: Orange County Community Indicators Project analysis of California Integrated Waste Management Board data (www.ciwmb.ca.gov/)

¹ Diversion rates by jurisdiction are available at www.ciwmb.ca.gov/lgcentral/divmeasure/stepbystep.htm.

More Days of Unhealthy Air and More Days of Good Air

Description of Indicator

This indicator measures the trend in the number of days per year when air quality in the South Coast Air Basin (which includes Orange, Los Angeles and parts of San Bernardino and Riverside Counties) was unhealthy according to the Air Quality Index (AQI). Also shown is the number of days in 2003 when air quality in Orange County was good, moderate, unhealthy for sensitive groups, or unhealthy for all people.

Why is it Important?

Poor air quality can aggravate the symptoms of heart or lung ailments, including asthma, and can cause irritation and illness in the healthy population, especially older adults and active children and adults. Long-term exposure increases risks for many health conditions including lung cancer and cardiovascular disease.

How is Orange County Doing?

There were five days of unhealthy air in Orange County in 2003 and 21 days considered unhealthy for sensitive groups, such as asthmatics (see page 43, Pediatric Asthma). This is slightly more unhealthy days than the previous year. However, Orange County had more days of good air in 2003 (185 days) than 2002 (176 days). On any given day, particulate matter was the most common pollutant (207 days), followed by ozone (150 days). Orange County exceeded standards for these two pollutants at various times in 2003. All four counties in the South Coast Air Basin experienced an increase in unhealthy air in 2003. As a whole, the South Coast Air Basin is a “non-attainment area” which means it persistently does not meet federal air quality standards. However, Orange County’s coastal location contributes to the county consistently having the lowest air pollution level in the region.

Orange County Air Quality, 2003

Number of Days When Air Quality Was...			
Good	Moderate	Unhealthy for Sensitive Groups	Unhealthy
185	154	21	5

Source: U.S. Environmental Protection Agency, AIRData (www.epa.gov/air/data/index.html)

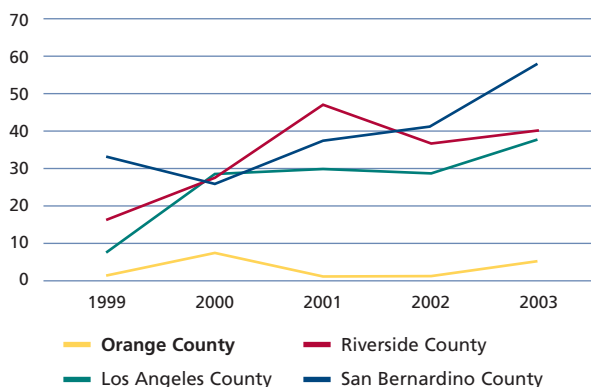
Air Quality Index

AQI Index Values	Health Categories
0 - 50	Good
51 - 100	Moderate
101 - 150	Unhealthy for Sensitive Groups
151 - 200	Unhealthy
201 - 300	Very Unhealthy
301 - 500	Hazardous

Source: U.S. Environmental Protection Agency, Air Quality Index: A Guide to Air Quality and Your Health, June 2000 (www.epa.gov/airnow/)

The Air Quality Index converts pollutants found in a community’s air to a number on a scale from 0 to 500. The AQI is calculated for five major air pollutants regulated by the Clean Air Act: ground-level ozone, particulate matter, carbon monoxide, sulfur dioxide, and nitrogen dioxide. An AQI value of 100 generally corresponds to the national air quality standard for the pollutant. Levels over 100 are considered unhealthy.

Number of Days When Air Quality Was Unhealthy in the South Coast Air Basin, 1999-2003



Source: U.S. Environmental Protection Agency, AIRData (www.epa.gov/air/data/index.html)

Orange County and the Health Effects of Air Pollution: Recent Research

A 2003 study suggests that children with severe asthma (defined as needing medication daily) start suffering from symptoms when air quality is in the “moderate” range. In 2003, there were 154 days when air quality in Orange County fell in the moderate range. A 2004 study of Southern California children showed that current levels of air pollution have long-term adverse effects on lung development in children from the age of 10 to 18 years. The study showed that higher levels of PM 2.5 (particulate matter smaller than 2.5 micrometers) correlated with greater deficits in lung development. While Orange County’s air is the least polluted in the Southern California region, PM 2.5 is the most common pollutant, originating primarily from tailpipe emissions, particularly diesels. In 2003, Orange County exceeded the standard for the annual average concentration of PM 2.5 at our Anaheim monitoring station.

Sources: Journal of the American Medical Association, October 8, 2003; New England Journal of Medicine, September 9, 2004; and U.S. Environmental Protection Agency

Conservation and Investments Key to Future Supply

Description of Indicator

This indicator measures Orange County annual urban (residential and commercial) water usage in gallons per capita per day.¹ It also shows, by source, projected water use and supplies through 2020 and the cost of various water supplies.

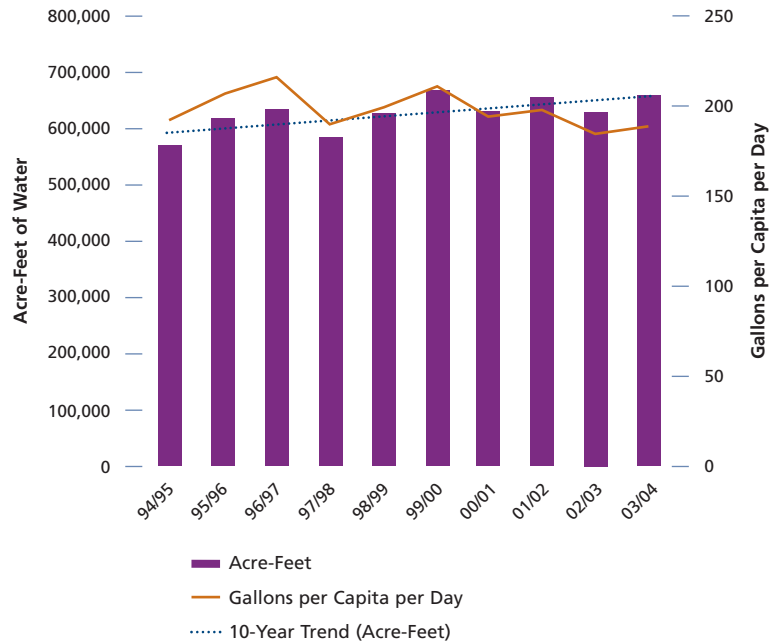
Why is it Important?

The drought in the western United States is the most severe in 500 years. The Colorado River, a major source of imported water for Orange County, is at a level lower today than during the Dust Bowl years of the 1930s. The groundwater basin that underlies most of north and central Orange County has been drawn down and needs to be refilled. Despite these challenges, water continues to flow, thanks to past investments that ensure supply, even during dry periods. Addressing future supply challenges requires innovative solutions by local agencies.

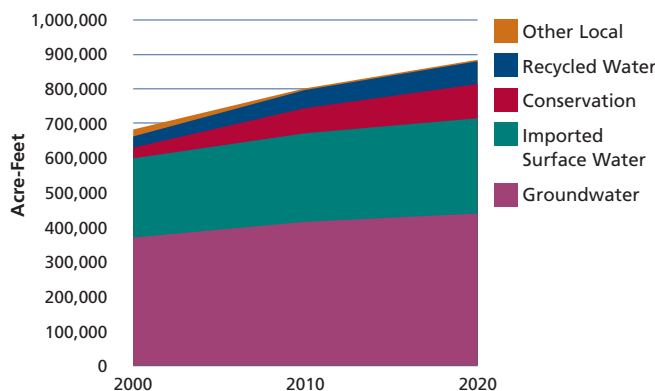
How is Orange County Doing?

In 2003/04, the daily per capita usage among Orange County residents and businesses was 197 gallons which equates to a total of about 664,000 acre-feet for all Orange County. Over the past 10 years per capita water usage has increased by an average of about 0.1% annually and overall water usage in acre-feet has increased by an average of 1.7% annually. To meet projected increasing demand, in 2020 Orange County will continue to need imported water and groundwater and will rely more heavily on conservation and alternative water supplies. The Orange County Water District's Groundwater Replenishment System, which uses recycled water to replenish the groundwater basin, will provide a new, high-quality source of water beginning in 2007. Ocean water desalination is also being evaluated by the Municipal Water District of Orange County to meet future needs.

Urban Water Usage, Orange County, 1995-2004

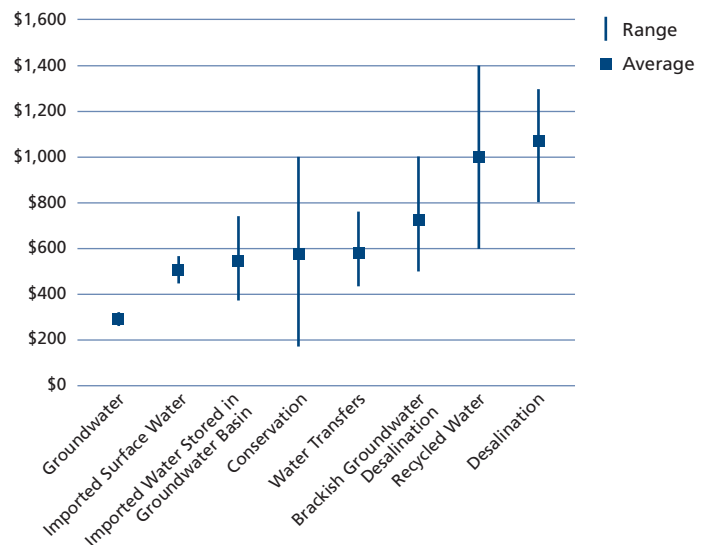


Water Use and Supply Projection by Source
Orange County, 2000-2020



Note: Projection estimates have been revised since the last Community Indicators report.

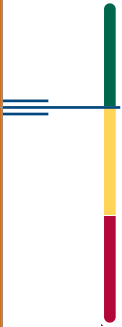
Cost of Water per Acre-Foot to Wholesaler
by Source, 2004



Sources: Municipal Water District of Orange County, Orange County Water District, and California Department of Finance (Tables E-4)

¹ Water usage trend data in previous Community Indicators reports inadvertently included agriculture usage. The usage trend data has been changed to show only urban usage.

Civic Engagement



Voter turnout for the 2004 Presidential Election was the **highest** in 20 years. Despite **low** community **involvement**, most residents are **satisfied** with life in Orange County.

Formal Civic Involvement is Low

Description of Indicator

This indicator measures Orange County residents' participation in their community's civic life. Specifically, this indicator looks at the number of times in 2002 that Orange County residents: worked on a community project, went to a club meeting, attended a sports event for children, did volunteer work, and attended religious services. This indicator also reports the extent of Orange County residents' membership in formal clubs in 2002.

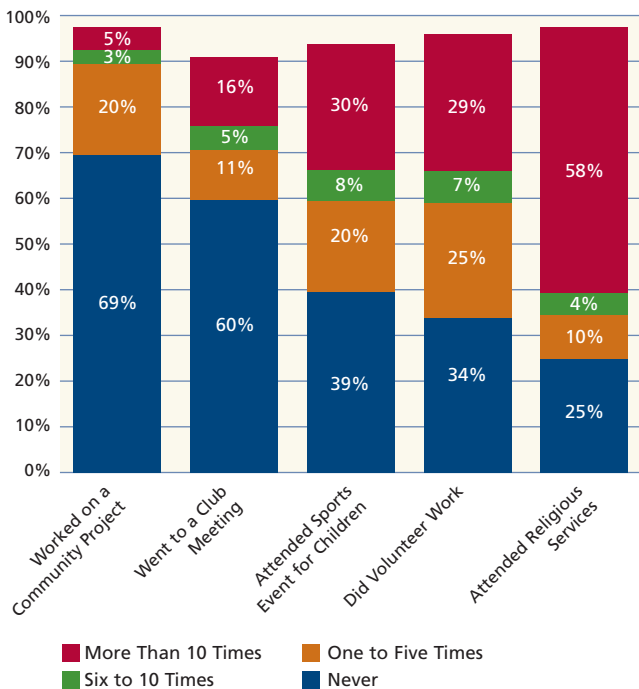
Why is it Important?

Nationwide there has been a decline in Americans' direct participation in politics and civic affairs over the last generation.¹ This erosion of civic and political engagement could have detrimental effects on the functioning of our communities, civic life in general, voting trends, the strength of our local, regional, and national identity, and our personal and social connections with others.

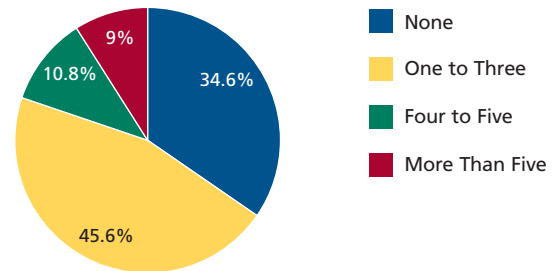
How is Orange County Doing?

Orange County residents reflect the national trend toward reduced levels of formal civic involvement. Many residents polled in 2002 stated that, in the past year, they did not participate in a community project (69%), attend a sports event for children (39%), or attend a religious service (25%). While 65% of residents polled reported being a member of a formal club, 60% of residents polled stated they had not attended a club meeting in the past year. Over the past three years that the survey has been conducted, change has not been significant. Between 2001 and 2002 a slight upward trend in participation rates can be perceived, particularly in the percentage of residents who attended religious services or volunteered.²

Percent of Orange County Residents in 2002 Who:



Orange County Residents' Membership in Formal Clubs, 2002



Source: California State University, Fullerton Center for Public Policy/ Orange County Business Council

Note: Percentages do not add up to 100% due to non-response of survey participants on items.

¹ Putnam, Robert. Bowling Alone: The Collapse and Revival of American Community, New York: Simon & Schuster, 2000.

² Changes from the previous year that fall within the estimated survey confidence interval of 5% to 7% may not be statistically significant.

County has Fewer Nonprofits than State and Nation; Higher Percentage of Education and Religious Organizations

Description of Indicator

This indicator measures the number, revenues and expenses of reporting 501c(3) nonprofit organizations. Only nonprofit organizations with over \$25,000 in annual revenue are required to file a tax return, and most religious organizations are exempt. Also shown are nonprofit organizations by type of service

Why is it Important?

Nonprofit, charitable organizations play an important role in filling the gap between government programs and local needs. A strong nonprofit sector is critical for a healthy and stable community.

How is Orange County Doing?

In 2000, Orange County had 1,899 nonprofit organizations or 14% of reporting nonprofits in Southern California with 6.7 nonprofits per 10,000 residents. This is less than the 8.2 nonprofits per 10,000 residents for the United States, 8.0 for California and 7.0 for comparably sized San Diego, but approximately equal to Los Angeles, and Southern California as a whole. Orange County nonprofits had \$4.2 billion in revenues, and nearly \$3.9 billion in expenses.

Orange County has a higher percentage of Education (e.g. universities, PTAs) and Religious (e.g. religious media, missionary) organizations compared to Southern California and a lower percentage of Arts (e.g. symphonies, theater), Health (e.g. hospitals, health clinics), and Human Services (e.g. homeless shelters, food banks). Orange County is comparable to the Southern California region in the percentage of Public Benefit (e.g. civil rights, leadership development), International (e.g. international relief), and Environment and Animals (e.g. environmental conservation, animal protection and welfare) organizations.

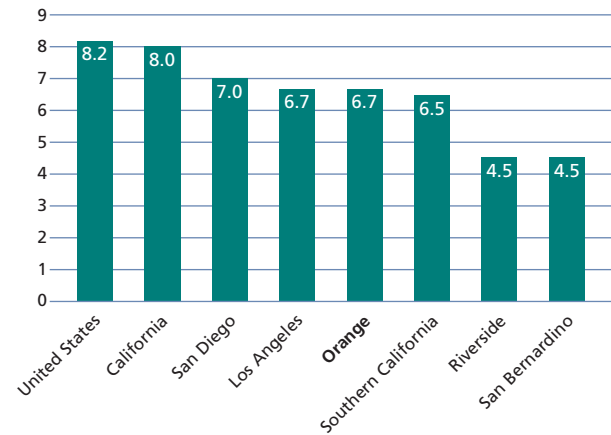
Human Services is the largest category (30%), but it is a smaller proportion of organizations than in the Southern California region (32%) or the nation (32%). However, the county's 500 Education organizations make up 26% of the total number nonprofits and this percentage is a higher proportion than the region (20%) or the nation (16%).

Ten Largest Nonprofits

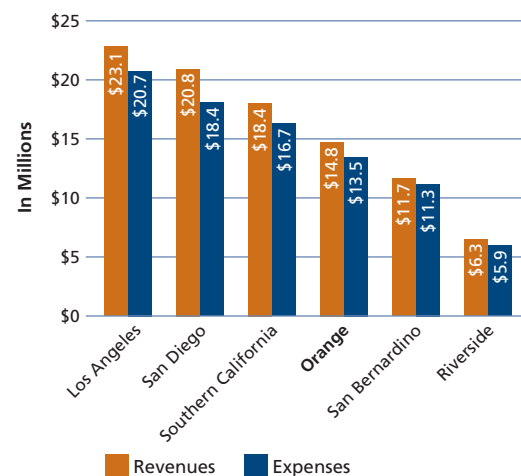
Orange County, 2000

1. Hoag Memorial Hospital Presbyterian
2. St. Jude Heritage Health Foundation
3. Children's Hospital of Orange County
4. St. Joseph Hospital of Orange County
5. Mission Hospital Regional Medical Center
6. St. Jude Medical Center
7. Trinity Christian Center of Santa Ana
8. Chapman University
9. Saddleback Memorial Medical Center
10. Anaheim Memorial Medical Center

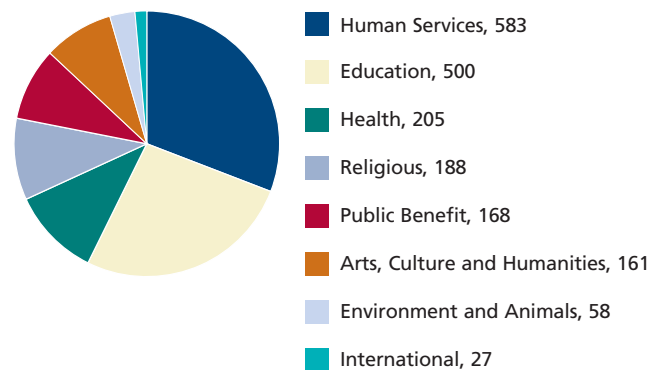
Nonprofits per 10,000 Population
County Comparison, 2000



Nonprofits' Revenues and Expenses per 10,000 Population
County Comparison, 2000



Nonprofits in Orange County by Category, 2000



Source: Gianneschi Center for Nonprofit Research, California State University, Fullerton

2004 Voter Turnout Exceeds State and National Averages

Description of Indicator

This indicator measures general election participation among Orange County registered voters. It also contains voter participation among the voting age population for presidential elections for Orange County, California, and the nation. The most recent measure is the participation rate of registered voters in the 2004 Presidential Election.

Why is it Important?

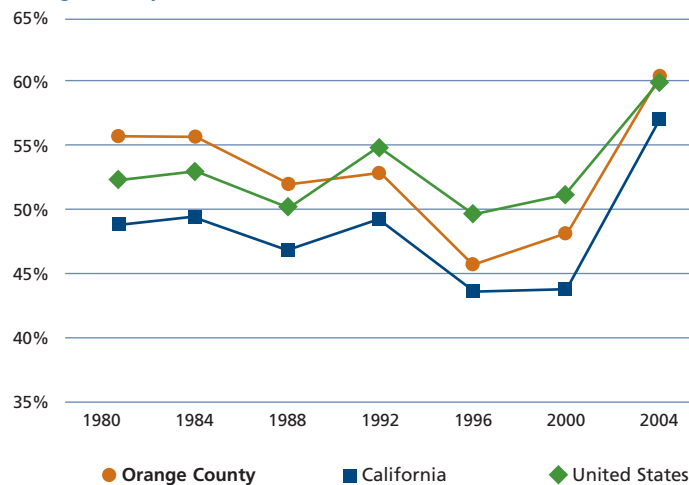
Voter participation measures civic interest and the public's optimism regarding their impact on decision-making. A high level of citizen involvement improves the accountability of government and the level of support for community programs.

How is Orange County Doing?

Voter participation among Orange County registered voters in the 2004 Presidential Election was 73.2% which is an increase over the 59% rate in the 2003 Special Recall Election and similar to the 73% participation rate in the 2000 Presidential Election. Orange County voter participation in the 2004 election was less than the state participation rate of 76%.

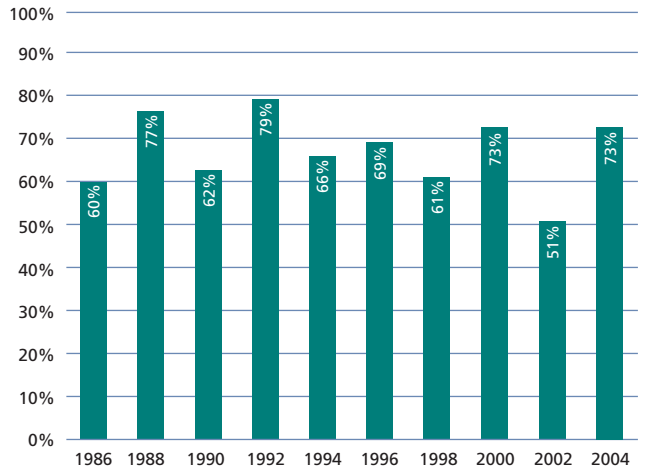
In the 2004 election, Orange County's participation rate among the broader voting eligible population rebounded (to 60.5%) and exceeded both the state (57%) and national (60%) figures of participation.

Presidential Election Turnout Among the Voting Age Population Orange County, 1980-2004



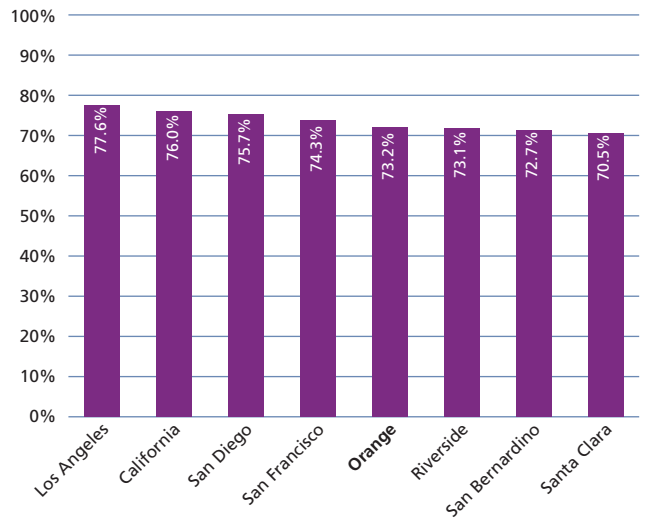
Sources: Federal Election Commission (www.fec.gov/elections.html) and George Mason University United States Election Project (http://elections.gmu.edu/voter_turnout.htm)

General Election Turnout Among Registered Voters Orange County, 1986-2004



Sources: California Secretary of State (<http://vote2004.ss.ca.gov>Returns/status.htm>) and Orange County Registrar of Voters

Election Participation Rates Among Registered Voters County Comparison, 2004



Source: California Secretary of State (<http://vote2004.ss.ca.gov>Returns/status.htm>)

More Consider Affordable Housing a Problem; Perception of State Markedly Improved

Description of Indicator

This indicator measures the perception of wellbeing and quality of life in Orange County, and whether county residents believe the county and state are going in the right direction.

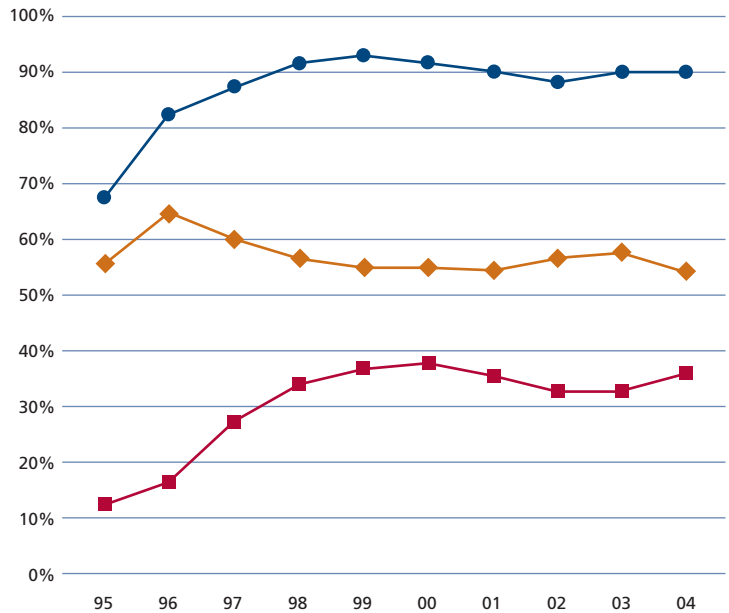
Why is it Important?

Perception of wellbeing reflects individuals' level of satisfaction with home, work, leisure, finance and governance – in short, with life in Orange County. Knowing what residents consider problems informs decision makers about which issues to address.

How is Orange County Doing?

Orange County residents appear to remain satisfied with how their lives are going. According to the 2004 Public Policy Institute of California survey, 90% of residents stated “things are going well.” Residents also generally believe the county is going in the right direction, but they are not as positive about the state. In November 2004, 77% of Orange County residents responded that the county is “going in the right direction,” while 61% believed the same for the state. However, this gap is significantly less than the record setting 50 percentage point gap in September 2003 where only 22% of Orange County residents believed the state was going in the right direction. The top issues that Orange County residents rank as “big problems” in 2004 are the same as in 2002 and 2003 although the proportions are somewhat different: traffic congestion (57%) and affordable housing (55%). These are followed by population growth and development (33%) and lack of job opportunities (21%). All four were considered more of a problem in 2003 except for affordable housing, which increased three percentage points in 2004.

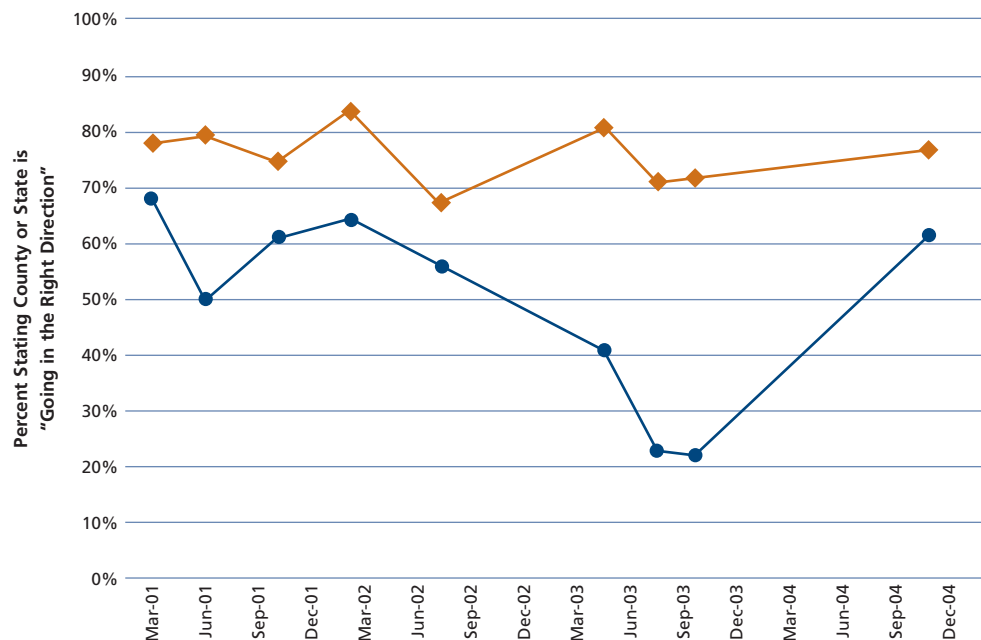
Percent of Orange County Residents Indicating “Things Are Going Well,” 1995-2004



Sources: Orange County Annual Survey (1995-2000) and Public Policy Institute of California Statewide Survey, Special Survey of Orange County, in collaboration with University of California, Irvine (<http://ocsurveys.lib.uci.edu/>) (2001-2004)

● Total Rating County Positively ◆ Somewhat Well ■ Very Well

Orange County Resident Opinion of the Direction of Orange County and California March 2001-December 2004



Sources: California State University, Fullerton Center for Public Policy and Orange County Business Council

● California ◆ Orange County

The Community Indicators report would not be possible without the data provided by the following agencies and the expertise of their representatives:

Annual Report on the Conditions of Children in Orange County	County of Orange Integrated Waste Management Department	First American Real Estate
California Child Care Resource and Referral Network	County of Orange Office of the District Attorney	Forbes Magazine
California Department of Education	County of Orange Probation Department	George Mason University United States Election Project
California Department of Justice	County of Orange Registrar of Voters	Marcus & Millichap Research Services
California Department of Social Services/Community Care Licensing	County of Orange Resources & Development Management Department/Harbors, Beaches and Parks	Milken Institute
California Department of Transportation, District 12	County of Orange, Resources & Development Management Department, Geomatics/LIS Division, GIS Mapping Unit	National Association for the Education of Young Children
California Community Colleges, Chancellor's Office	County of Orange Social Services Agency/Adult Protective Services	National Association of Family Child Care
California Managed Risk Medical Insurance Board	County of Orange Social Services Agency/Children and Family Services	National Low Income Housing Coalition
California Postsecondary Education Commission	County of Orange Social Services Agency/Family Self-Sufficiency	Neighborhood Knowledge California
California State University, Fullerton	Dean Runyan Associates	North Carolina State Board of Education
Capistrano-Laguna Beach Regional Occupational Program	Gianneschi Center for Nonprofit Research, California State University, Fullerton	PricewaterhouseCoopers/Thomson Venture Economics/NVCA Moneytree
Center for Demographic Research at California State University, Fullerton	La Jolla Institute	Scarborough Research
Center for Economic and Environmental Studies at California State University, Fullerton	Meyers Group	Texas Education Agency
Center for Health Policy Research at University of California, Los Angeles	Municipal Water District of Orange County	United States Bureau of Economic Analysis
Center for Public Policy at California State University, Fullerton	North Orange County Regional Occupational Program	United States Bureau of Labor Statistics
Center for Social Service Research at University of California, Berkeley	Orange County Business Council	United States Census Bureau
Center for Community Collaboration at California State University, Fullerton	Orange County Executive Survey	United States Centers for Disease Control and Prevention
Center for the Study of Emerging Markets at California State University, Fullerton	Orange County Health Needs Assessment	United States Conference of Mayors
Central County Regional Occupational Program	Orange County Sheriff Department	United States Department of Health and Human Services
Chapman University	Orange County Transportation Authority	United States Department of Housing and Urban Development
Children and Families Commission of Orange County	Orange County Water District	United States Environmental Protection Agency
Coastline Regional Occupational Program	Public Policy Institute of California	United States Federal Election Committee
County of Orange County Executive Office	Santa Ana College	United States Patent Office
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County of Orange Health Care Agency/Environmental Health	University of California, Office of the President	University of Michigan
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	Federal Transit Administration	

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