



Orange County

2013

COMMUNITY INDICATORS

2013

Thank you for your interest in the 2013 Community Indicators report. This year's report reveals a strong comeback in world trade, along with job gains and steady per capita income. Educational indicators also make a strong showing, with gains in student proficiency, high school completion, and college readiness. Several of the health, public safety and environmental indicators reflect positive movement, including fewer deaths from heart disease, low crime, and increased use of renewable energy.

Still, the Orange County region continues to face a range of persistent and challenging issues including family poverty, housing and food insecurity, and geographic disparities in educational achievement. The county can take pride in a nonprofit sector that works hard to close the gaps in basic needs and education. However, there are fewer financial resources available to nonprofit organizations, posing a serious challenge for this sector and our vulnerable populations. Further, the aging of our population will test the region's ability to provide the specialized services needed to meet the increasing demand.

One emerging tool for addressing these important issues and creating positive change is known as "collective impact." Using this approach, Orange County businesses, nonprofits and government organizations are joining forces to address critical needs in housing and homelessness, health, and education. One of this year's

special features highlights recent work by Orange County United Way to develop community-wide aspirational goals in these areas.

Another indicator illustrates how Orange County residents are using technology to work, shop, communicate, and access digital services. The rising use of smartphones across all ages, income levels and ethnic groups highlights the importance of technology to Orange County residents.

Whether collective impact is achieved through partnerships, technology, economic growth, educational advances, or a combination of factors, the annual Community Indicators report will continue to track critical areas of need and quality of life for all residents.

Michael M. Ruane
Project Director

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Introduction

Released annually since 2000, the Orange County Community Indicators report tracks county-wide trends related to the economy, environment, and populace. The data in this report allows stakeholders to ask whether a certain practice or trend is sustainable. Simply put: Are we investing in our future? To invest, we must be making decisions that will foster and maintain Orange County's vitality now and into the future. Otherwise, we are leaving it up to later generations to pay the costs and consequences of our decisions. The issues we face are complex and interrelated. By investing wisely, communities and individuals alike can provide for a thriving and sustainable place for us, our children, and our children's children to call home.

Indicator Selection

Good indicators are measurements that reflect how a community is doing and indicate whether key attributes are improving, worsening, or remaining constant. The indicators included in this report:

- Reflect broad countywide interests which impact a significant percentage of the population
- Illustrate fundamental factors that underlie long-term regional health
- Can be easily understood and accepted by the community
- Are statistically measurable and contain data that is both reliable and available over the long-term
- Measure outcomes, rather than inputs whenever possible

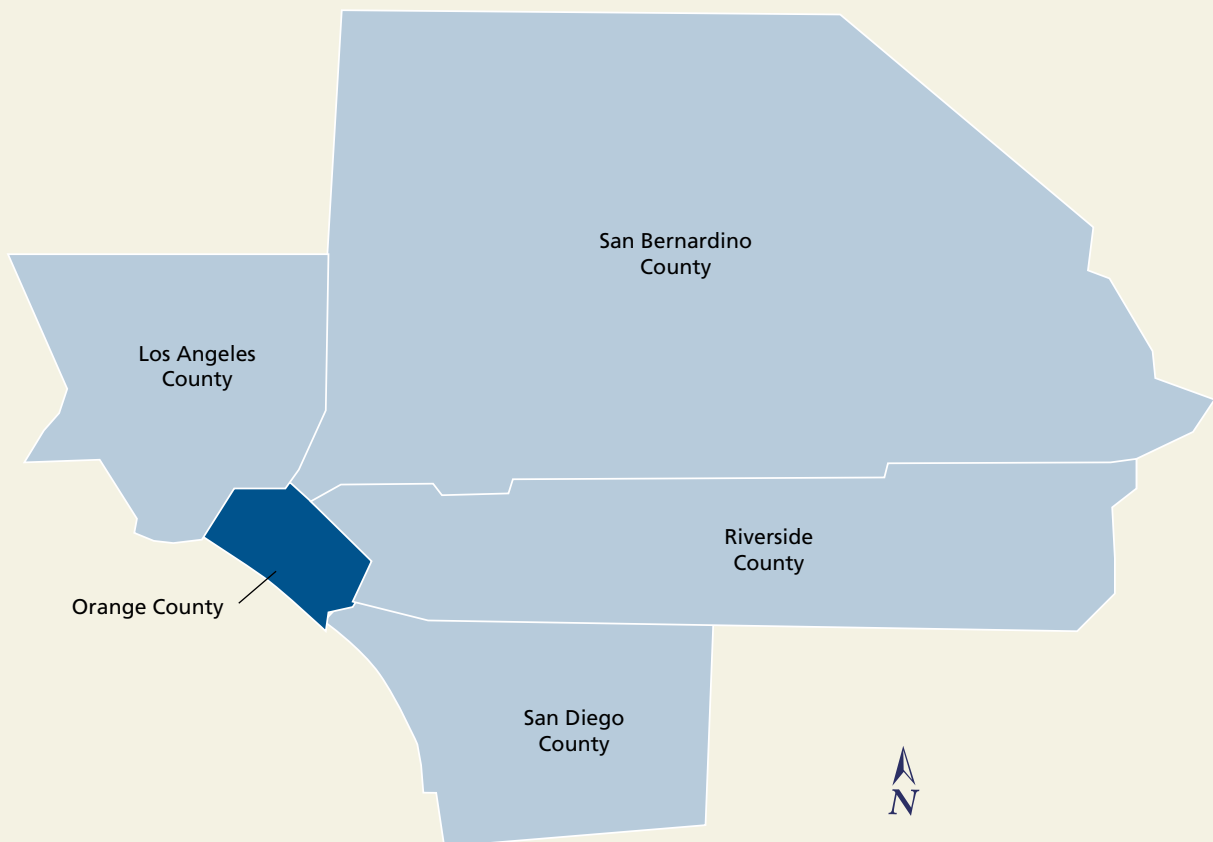
Peer Regions

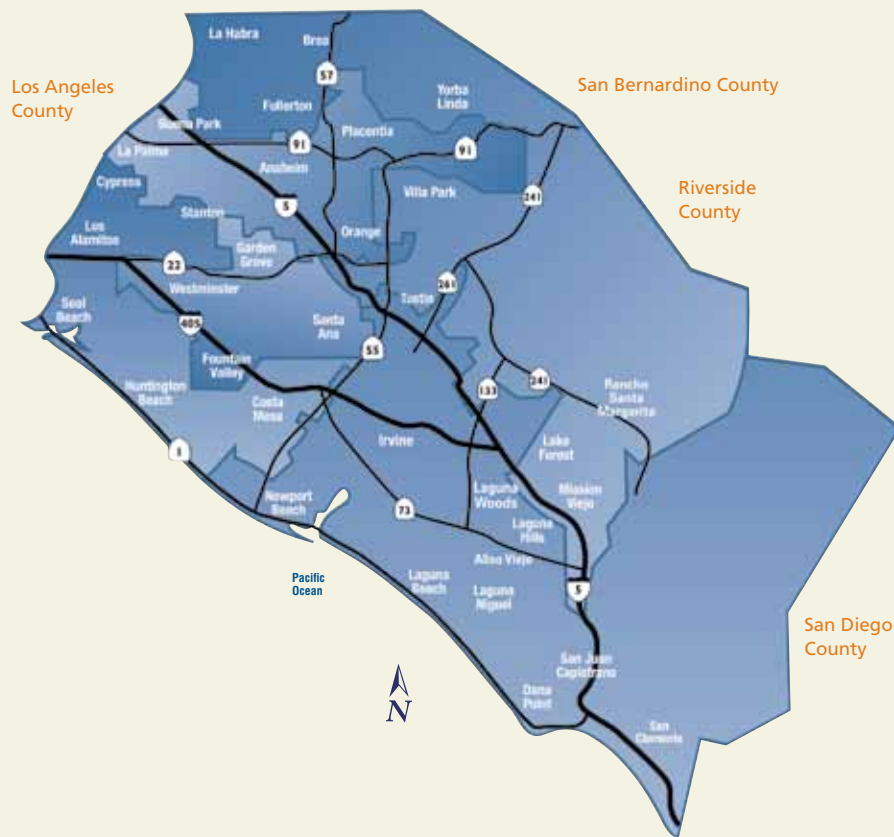
To place Orange County's performance in context, many indicators compare the county to the state, nation or other regions. Specifically, we compare ourselves to our neighbors to better understand our position within the Southern California region. We also compare ourselves to "peer" regions, both within California and nationwide, because they are economic competitors or good barometers for comparison due to the many characteristics we have in common. Each section of the report includes slightly different peer regions based on the characteristics considered relevant to that topic.

Since the manner in which data is collected and reported varies among data sources, the boundaries of our peers vary as well. Metro areas or divisions, as defined by the U.S. Office of Management and Budget, were used whenever possible. In other instances, the county boundary or a boundary defined by the data source was used. For additional information regarding the boundaries and definitions of peers used for a particular measure, please contact ocindicators@ocgov.com.

County Profile

Orange County is located on the Southern California coast, with Los Angeles County to the north, San Diego County to the south, and Riverside and San Bernardino counties to the east. There are 34 cities within the county and several unincorporated areas.





POPULATION

Growth

Orange County is the third largest county in California:

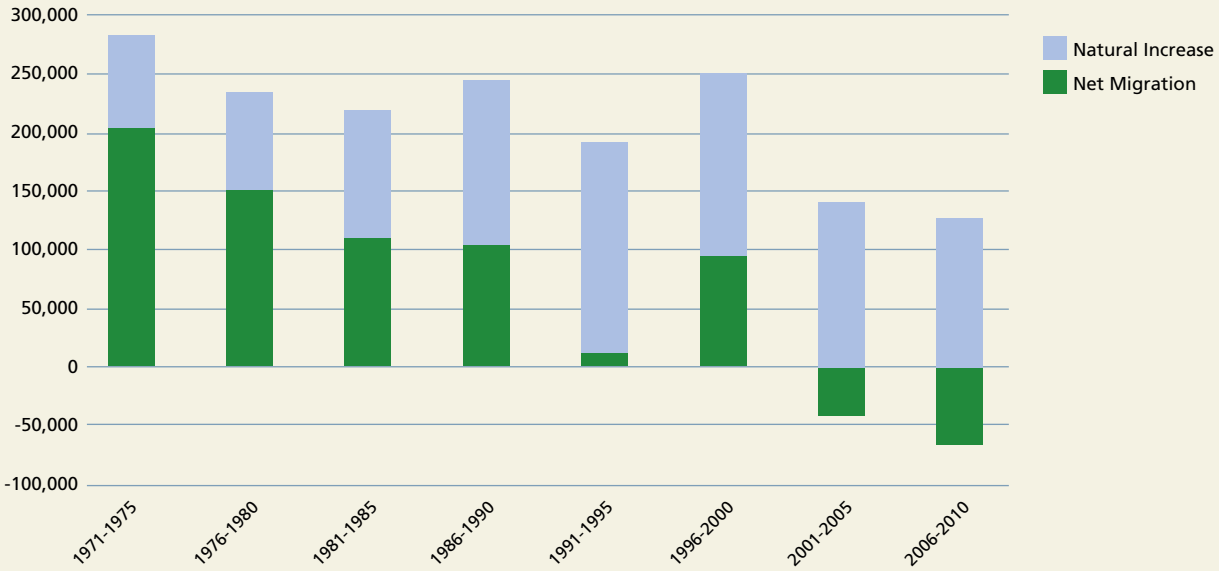
- With a population of 3,071,933 in July 2012, Orange County falls behind Los Angeles (9,911,665) and San Diego (3,147,220) counties for the most populous county in the state.¹
- Orange County is the sixth largest county in the nation, with more residents than 20 of the country's states, including Mississippi, Arkansas, Kansas, Utah, and Nevada.²
- At its peak, Orange County's population increased rapidly – an average of 22% per year in the 1950s and 10% per year in the 1960s.³
- The average annual increase slowed considerably to 1.7% between 1990 and 2000, and further to 0.6% between 2000 and 2010.⁴
- Between 2010 and 2012, the population growth rate was 0.9%.⁵
- Orange County ranks sixth out of more than 3,000 counties nationwide in terms of the number of people added to the county between 2010 and 2011.
- However, Orange County's already high base population combined with slowing growth places it 346th in the nation in terms of the percentage of change between 2010 and 2011.⁶
- The county's population growth is projected to continue at an increasingly slower rate over the next 20 years, reaching a little over 3.4 million by 2035.⁷

Components of Population Change

Since the 1980s, natural increase (births minus deaths) has outpaced migration as the county's principal source of growth:

- From the 1950s through the 1970s, much of the county's growth stemmed from migration into the county from within the state as well as from other states (domestic migration).⁸
- International immigration – largely from Asia and Latin America – has also contributed to Orange County's growth in the last 30 years, shifting the county's proportion of foreign-born residents from 6% in 1970 to 31% in 2011.⁹
- Between 2011 and 2012, Orange County added 20,970 residents through natural increase and 8,805 through international immigration.
- At the same time, the county lost 4,962 residents through domestic out-migration, for a net domestic migration increase of 3,843.¹⁰
- Long-range projections suggest this pattern will continue, with natural increase becoming the sole contributor to growth.¹¹

Components of Population Change
Orange County, 1971-2010



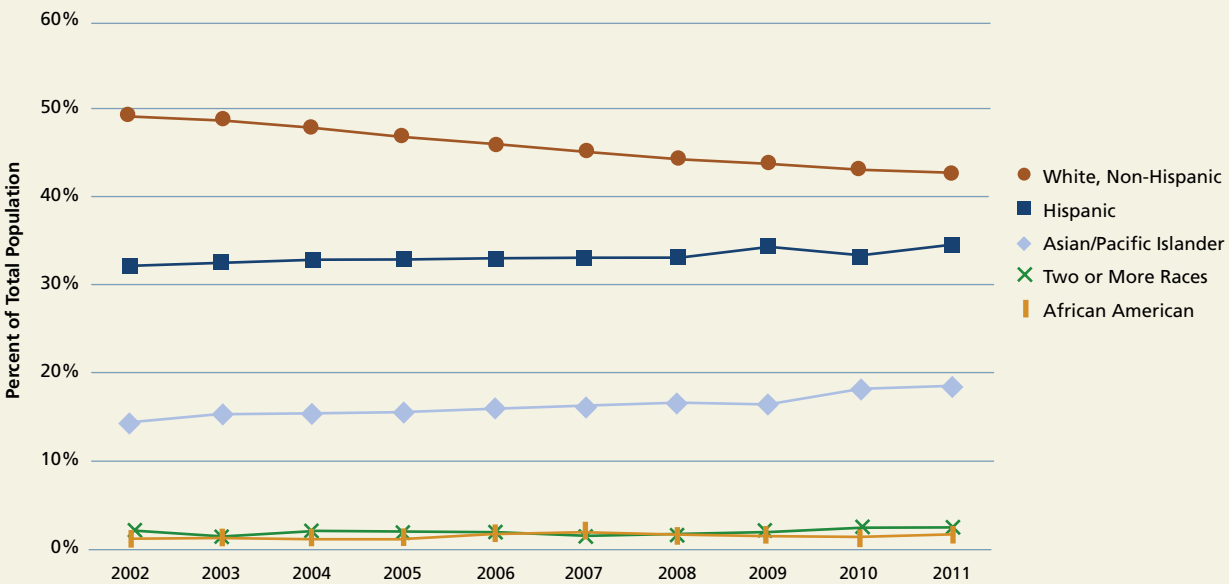
Source: Demographic Research Unit at California Department of Finance, Table E-6

Ethnicity and Age

Orange County is a racially and ethnically diverse region:

- 43% of Orange County residents self-identify as Non-Hispanic White, followed by 34% Hispanic (who may be of any race), and 18% Asian/Pacific Islander.
- 1.6% of residents are African American, another 2.1% are two or more races, and the remaining 0.3% are American Indian/Alaska Native or any other single race.¹²

Population by Race and Ethnicity
Orange County, 2002-2011



Note: All other races (American Indian/Alaska Native and any other single race) total less than one percent annually over the period shown.

Source: U.S. Census Bureau, American Community Survey, 2002-2011

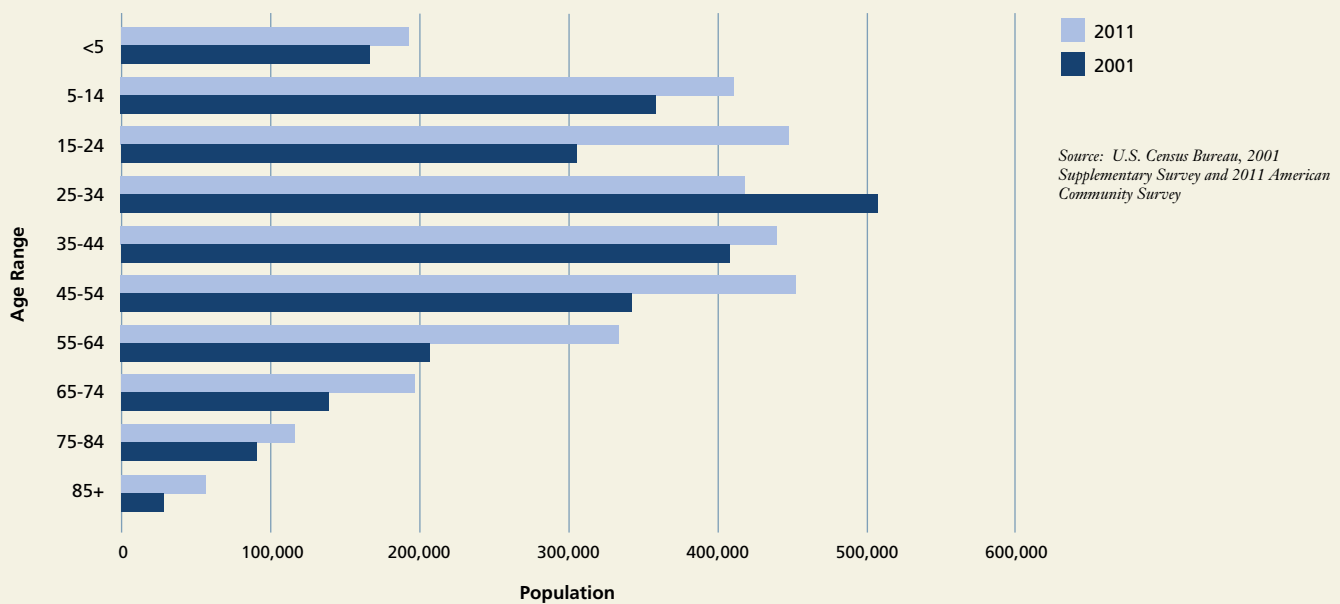
Orange County has a substantially higher proportion of foreign-born residents (31%) than the nationwide average (13%) and only somewhat higher than the statewide average (27%):

- Among Orange County residents at least five years of age or older, 46% speak a language other than English at home.
- Of those, the majority speak Spanish (58%) followed by Asian/Pacific Islander languages (30%), and other Indo-European languages (9%). The remaining 2% speak some other language.
- 21% of the total population report that they do not speak English “very well.”¹³

In 2011, the median age in Orange County was 36 years:

- This is slightly younger than the national median age of 37 years.¹⁴
- In 2001, the county’s median age was 35 years, indicating the county’s population is slowly aging.¹⁵
- In 2011, 24% of Orange County’s population was under 18 years (compared to 27% in 2001) and 12% were 65 years and older (compared to 10% in 2001).
- Between 2001 and 2011, Orange County’s population grew in all age groups except 25-34 year olds.¹⁶

Population by Age
Orange County, 2001 and 2011

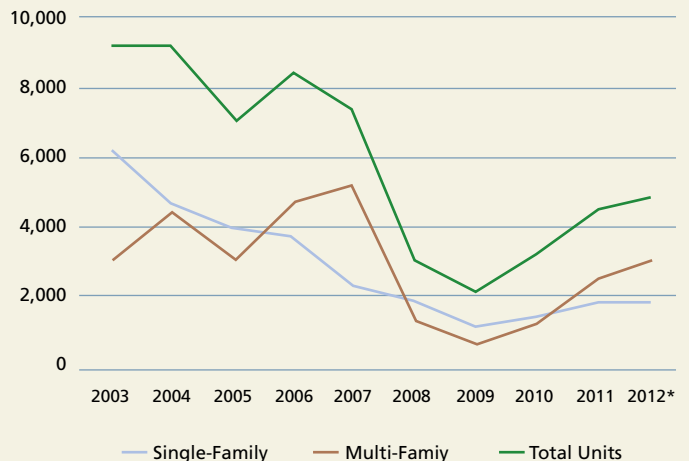


HOUSING

As of January 2012, there were 1,052,361 housing units available to Orange County residents:¹⁷

- According to the 2011 American Community Survey, a majority of occupied units were owner-occupied (60%) compared to renter-occupied (40%).
- Approximately half (51%) of the existing housing units in Orange County were single-family detached units.¹⁸
- Driven largely by increases in multi-family unit development, building permits issued for new construction continue to rebound.
- In 2011, single-family permits comprised 42% of total permits issued, compared to 66% in 2003 (the highest proportion in the past 10 years).
- Preliminary 2012 data indicates only 39% of permits issued were for single-family units.¹⁹
- Going forward, the county’s total housing stock is projected to grow 12% between 2010 and 2035, slightly slower than population growth (13%) and employment growth (19%) over the same period.²⁰

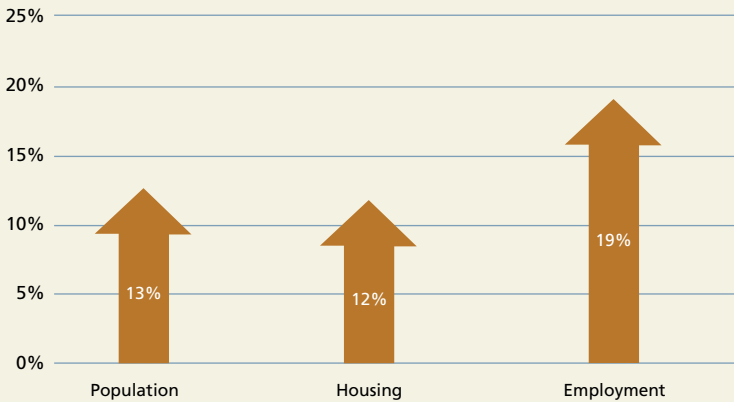
Housing Unit Building Permits
Orange County, 2003-2012



*2012 data is preliminary.

Source: U.S. Department of Housing and Urban Development

Projected Change in Population, Housing, and Employment Orange County, 2010-2035



Source: Center for Demographic Research, California State University, Fullerton, Orange County Projections 2010 Modified

AVERAGE HOUSEHOLD SIZE

The average household size in Orange County is 2.99 persons:

- Among the more than 3,000 counties in the nation, only 179 had an average household size larger than Orange County's.
- Orange County's average household size is larger than California (2.91) and the United States (2.60).²¹
- Santa Ana has the highest household size in the county (4.45) and the 10th highest household size in the nation when compared to cities or unincorporated areas with more than 20,000 residents.
- After Santa Ana, the Orange County cities with the highest household sizes include Garden Grove (3.73), Buena Park (3.56), Anaheim (3.37), and Stanton (3.35).
- Seal Beach, Laguna Beach and Newport Beach have the smallest household sizes (1.9, 2.0 and 2.2, respectively).²²

DENSITY

Census 2010 data shows Orange County remains one of the most densely populated areas in the United States, falling 18th among all counties in the nation:

- Census 2010 places Orange County's population density at 3,808 persons per square mile, an increase of 6% since 2000.²³
- Densities vary by location among Orange County's incorporated areas, from lows of 1,996 persons per square mile in Seal Beach and 2,449 in San Juan Capistrano to highs of 12,415 in Stanton and 12,005 in Santa Ana.
- Population density is much lower in unincorporated areas (431 persons per square mile).²⁴

LAND USE

Orange County covers 799 square miles of land, including 42 miles of coastline:

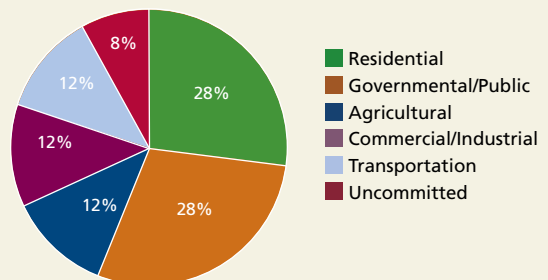
- The county's two main land uses are divided equally between residential housing (28%) and land classified as Governmental/Public, including open space and parks (28%).
- Agricultural uses comprise 12% of the county's land use, as do commercial and industrial uses (12%).
- Transportation infrastructure (e.g. roads, rails) accounts for 12% of county land, followed by 8% of land that is classified as Uncommitted, meaning it is either vacant or there is no data available.²⁵

Population Density Ranking County Comparison, 2010

Rank out of all U.S. Counties	County (Major City)	Persons per Square Mile of Land Area
5	San Francisco (San Francisco)	17,179
7	Suffolk (Boston)	12,416
18	Orange County (Santa Ana/Irvine)	3,808
26	Dallas (Dallas)	2,718
30	Los Angeles (Los Angeles)	2,420
37	Hennepin (Minneapolis)	2,082
67	Sacramento (Sacramento)	1,471
76	Santa Clara (San Jose)	1,381
106	Travis (Austin)	1,034
121	Seattle (Seattle)	913
145	San Diego (San Diego)	736
250	Maricopa (Phoenix)	415
348	Riverside (Riverside)	304
825	San Bernardino (San Bernardino)	102

Source: U.S. Census Bureau, GCT-PH1-R: Population, Housing Units, Area, and Density, Census 2010

Land Use by Category Orange County, 2011



Source: Orange County Public Works

EMPLOYMENT

While Orange County has the third highest population in the state, the county has the second highest number of jobs and the second highest number of firms:

- After averaging 1.54 million jobs between 2006 and 2008, employment in Orange County hit a post-crash low in January 2010 at 1.43 million jobs.
- Since then, employment has grown relatively steadily, totaling 1.51 million jobs as of November 2012.²⁶
- Long-range projections anticipate 1.78 million jobs by 2035, an increase of 19% from 2010 and growing at a faster rate than the county's population growth (13%) over the same period.²⁷
- Currently, the largest labor markets are Trade, Transportation and Utilities (18%), Professional and Business Services (18%), and Leisure and Hospitality (13%).²⁸ (See the Employment indicator for a detailed analysis of selected industry clusters and unemployment.)
- Between 2006 and 2011, all businesses, regardless of how many employees, experienced employment losses.
- Orange County's larger firms witnessed the most significant employment losses between 2006 and 2011 (-16% among firms with 500+ employees), while smaller firms were more stable (-4% among firms with up to 19 employees).
- In 2011, fewer Orange County residents worked in large firms of 500+ employees (16%) than the statewide average (21%).²⁹

Number of Businesses and Employees, by Size of Business Category (Private Industry)
Orange County, Third Quarter 2011



Source: California Employment Development Department

¹ California Department of Finance, Demographic Research Unit, Table E-2 (www.dof.ca.gov/research/demographic/reports/view.php). July 2012 estimates are considered preliminary.

² U.S. Census Bureau, Population Estimates Program, Vintage 2011 County Population Datasets, CO-EST2011-all data (www.census.gov/popest/data/datasets.html)

³ U.S. Census Bureau and California Department of Finance as reported by Center for Demographic Research, California State University, Fullerton, Orange County Progress Report 2010 (www.fullerton.edu/cdr)

⁴ California Department of Finance, Demographic Research Unit, Table E-6

⁵ California Department of Finance, Demographic Research Unit, Tables E-2 and E-6

⁶ U.S. Census Bureau, Population Estimates Program, Vintage 2011 County Population Datasets (www.census.gov/popest/data/datasets.html)

⁷ Center for Demographic Research, California State University, Fullerton, Orange County Projections 2010 Modified

⁸ Center for Demographic Research, California State University, Fullerton, Orange County Projections 2010 Modified

⁹ Center for Demographic Research, California State University, Fullerton, Orange County Projections 2010 Modified; U.S. Census Bureau, 2011 American Community Survey

¹⁰ California Department of Finance, Table E-2

¹¹ Center for Demographic Research, California State University, Fullerton, Orange County Projections 2010 Modified

¹² U.S. Census Bureau, 2011 American Community Survey

¹³ U.S. Census Bureau, 2011 American Community Survey

¹⁴ U.S. Census Bureau, 2011 American Community Survey

¹⁵ U.S. Census Bureau, 2001 Supplementary Survey

¹⁶ U.S. Census Bureau, 2011 American Community Survey and 2001 Census (SF-1)

¹⁷ California Department of Finance, Table E-5

¹⁸ U.S. Census Bureau, 2011 American Community Survey

¹⁹ U.S. Department of Housing and Urban Development (<http://socds.huduser.org/permits/index.html>)

²⁰ Center for Demographic Research, California State University, Fullerton, Orange County Projections 2010 Modified

²¹ U.S. Census Bureau, 2006-2010 American Community Survey Five-Year Estimates

²² U.S. Census Bureau, 2009-2011 American Community Survey Three-Year Estimates (only cities or unincorporated areas with population over 20,000 are included in the ranking)

²³ U.S. Census Bureau, Census 2010, Table GCT-PH1: Population, Housing Units, Area, and Density

²⁴ Calculated from land area data presented in the Orange County Progress Report 2012 by the Center for Demographic Research, California State University, Fullerton, and population figures from the California Department of Finance, Table E-1, January 1, 2012

²⁵ County of Orange Public Works

²⁶ Employment Development Department, Employment by Industry Data for Orange County (www.labormarketinfo.edd.ca.gov/?pageid=166)

²⁷ Center for Demographic Research, California State University, Fullerton, Orange County Projections 2010 Modified

²⁸ Employment Development Department, Employment by Industry Data for Orange County (www.labormarketinfo.edd.ca.gov/?pageid=166)

²⁹ Employment Development Department, Size of Business Data, 2001-Present (www.labormarketinfo.edd.ca.gov/?PAGEID=138)



Special Features

Cell Tower Siting: Balancing Land Use and Connectivity Needs

Description of Indicator

This indicator provides an overview of issues surrounding wireless connectivity from the perspective of local jurisdictions in Orange County. It includes opinions about wireless signal coverage and quality, the administrative aspects of cell tower siting, engagement in public outreach, and the importance of wireless connectivity for public safety.¹

Why is it Important?

The proportion of smartphone owners is increasing nationwide, from 35% in 2011 to 46% in 2012.² In Orange County, 50% of adults own a smartphone (see the Internet Access and Smartphone Use indicator).³ What's more, 28% of adults in California and 32% of children live in wireless-only households.⁴ Beyond the social impact of this shift toward cell-based platforms, there are practical implications related to demand on cellular infrastructure. Cities and the County have an interest in meeting the demand as residents give up their landlines and cellular technology becomes increasingly important for public safety and disaster preparedness. Further, cell tower siting can be controversial, depending on the circumstances of the proposed installation and the opinions of the residents, elected officials, and staff.

How is Orange County Doing?

Coverage

Over half of local jurisdictions responding to the survey indicated that wireless coverage and signal quality in their jurisdiction is good:

- 12% feel connectivity is very good, 50% consider it good, 35% feel it is average, and 4% say it is poor.
- Despite these positive marks, more than half of respondents (58%) are aware of coverage gaps in their city.
- The most frequently cited sources of knowledge about those gaps came from personal experience and cellular service providers' analysis of coverage.
- About half of those who are aware of coverage gaps said that residents had notified the city about the gap, and one city indicated notification by public safety staff.

Public Safety and Disaster Preparedness

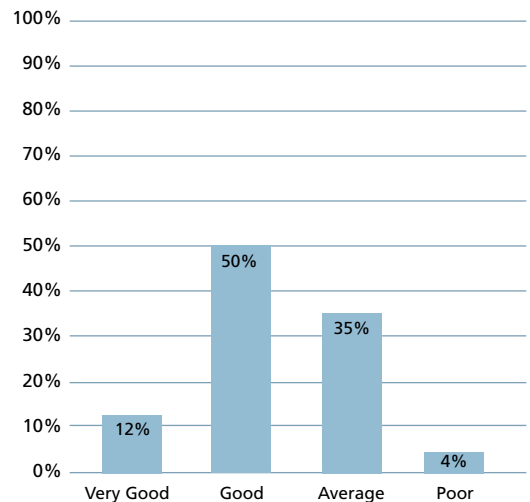
When asked whether wireless coverage and signal quality is a public safety issue, most jurisdictions agreed that it was:

- 39% strongly agreed that wireless connectivity is a public safety issue and 42% moderately agreed, while 15% moderately disagreed and 4% strongly disagreed.
- Fully 77% of jurisdictions surveyed agreed that wireless coverage and signal quality are important for disaster preparedness.

Countywide Wireless Committee

As more and more residents forgo landlines and turn to wireless platforms, Orange County's local jurisdictions must address the increasingly critical issues of public safety and the economic impact of wireless coverage for residents and businesses. To assess the issues surrounding wireless, the ACC-OC (Association of California Cities-Orange County) created a Countywide Wireless Committee, which was instrumental in conceiving and designing the survey of city and County planning directors summarized in this special feature. The Countywide Wireless Committee also collaborates with the ACC-OC Jobs and Economic Development Committee to build awareness of the nexus between wireless connectivity and economic development, recognizing that the quality of coverage fosters – or inhibits – economic growth.

Rating of Wireless Coverage and Signal Quality
Orange County Cities/County, 2012



Source: Orange County Community Indicators Project Wireless Connectivity Survey of Planning Directors, 2012

Cell Towers and Property Values

According to a recent study in Silicon Valley, cell phone towers have no discernible impact on home prices. The data was compiled using more than 1,600 single-family home transactions from January to September 2012 and 70 wireless sites in a selection of Silicon Valley cities with varying home prices. The survey compared the list and sale price for transactions based on the distance from the wireless facility.

Source: Silicon Valley Joint Venture and the Santa Clara County and Silicon Valley Associations of Realtors (www.jointventure.org/images/stories/pdf/wireless-facilities-impact-on-property-values.pdf)

¹In fall 2012, the Orange County Community Indicators Project, in partnership with the Association of California Cities-Orange County, fielded a survey of planning directors in Orange County cities and the County of Orange related to wireless issues. The results of this survey are summarized in this special feature. For most questions, the results include responses from 27 cities (79% of Orange County cities) and the County of Orange.

²Pew Research Center (www.pewinternet.org/Reports/2012/Smartphone-Update-2012.aspx)

³Scarborough Research

⁴Wireless Substitution: State-level Estimates From the National Health Interview Survey, 2010–2011 (www.cdc.gov/nchs/nhis.htm)

Public Sentiment

Public response to new cell towers is mixed:

- Most jurisdictions (62%) indicated that the public response to new cell towers in their community is negative, while 38% felt their residents are positive.
- Asked a different way, a majority of jurisdictions felt that their residents are satisfied with the current level of coverage and therefore won't support more cell towers (23%), or their residents simply don't think about wireless connectivity (54%).
- 23% of jurisdictions think their residents want better coverage and would support installations to expand and improve coverage.

Certain arguments by the public to support or oppose cell tower siting are more or less likely to factor into decision-making:

- In terms of supportive arguments, jurisdictions are influenced by arguments for better connectivity (62%) and increased emergency response and/or disaster preparedness (38%).
- Economic development and financial benefits to the city/County or site owner are less likely to factor into decision-making (15% and 8%, respectively).
- In terms of arguments opposing a cell installation, jurisdictions factor in public sentiment on aesthetics (92%), health concerns (35%), and property values (35%).

Cell Tower Permitting

A typical cell tower permit takes approximately 2-3 months to process:

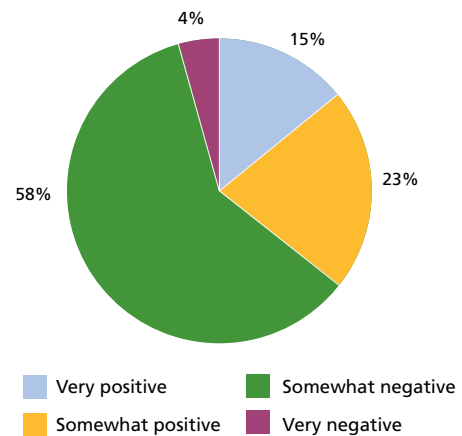
- While a permit can take anywhere from one week to over three years, the timing varies depending on the type of installation, the location, and whether the permit is appealed.
- 93% of jurisdictions responding to the survey have a specific ordinance, code, or guideline that governs cell tower placement.

It is common for local jurisdictions to grant leases of public right of way or public property for cellular installations:

- 78% of jurisdictions indicated they allow lease of public right of way or property, most jurisdictions have at least one approved installation.
- The number of installations from city-to-city ranges from zero to 23, with a countywide median of five.
- Among the jurisdictions surveyed, annual revenue from cell tower permits and/or leases varies considerably, from zero to over \$400,000.

Planning Directors' Assessment of Public Response to New Cell Towers

Orange County Cities/County, 2012

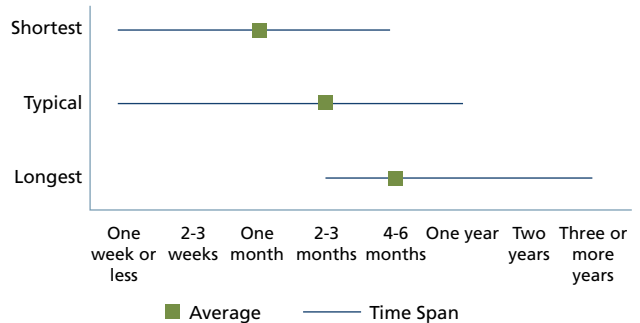


Stealth Installations

Some survey respondents noted that the type of cellular installation is important, with "stealth" installations (equipment that is not easily noticed) often facing little or no opposition. Classic towers, with little attention to design and aesthetics, however, are more likely to garner opposition.

Amount of Time for Cell Tower Approval

Orange County, 2012



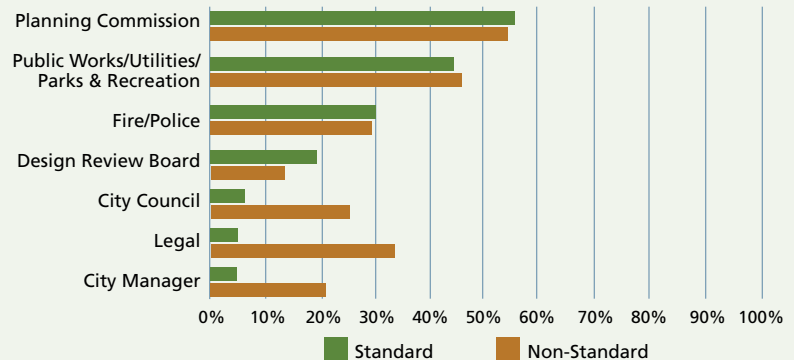
Source: Orange County Community Indicators Project Wireless Connectivity Survey of Planning Directors, 2012

Who Reviews a Cell Tower Application?

In local jurisdictions across Orange County, between one and four departments or governing bodies review a standard cell tower permit application, and that number increases to a maximum of six for non-standard applications (such as appeals of previous decisions, or installations that are controversial or non-conforming). At minimum, the Planning Department or Zoning Administrator reviews the application. With a non-standard permit application, the likelihood it will go through the City Manager rises from 4% to 21%, the likelihood it will be reviewed by the City Council rises 7% to 25%, and the likelihood it will go through legal counsel review rises from 4% to 33%.

Percent of Jurisdictions Indicating Department/Governing Body Must Review Cell Permit Application

Orange County Cities/County, 2012



Note: Chart does not include Planning Department, assumed to review 100% of applications.

Data Drives Innovative Community Solutions

Description of Indicator

This special feature describes Orange County United Way's recent strategic planning effort, which combined data analysis and community dialogue to establish countywide goals. It also summarizes other recent countywide efforts to address common priorities, and highlights opportunities for regional collaboration in the area of housing.

Why is it Important?

For more than a decade, Orange County has used data to track local trends across a range of topics, identifying areas of concern for consideration and action by community leaders and organizations. Over the years, individual organizations have used this data to inform their own initiatives. Now, several Orange County organizations are developing a common agenda and working toward collaborative approaches to achieving community improvement. This local effort follows a growing nationwide movement to tackle communitywide issues collaboratively, through mutually agreed-upon goals, strategies, and investment.

How is Orange County Doing?

Defining Community Goals

In 2012, Orange County United Way (OCUW) set out to conduct a strategic planning and community engagement effort that would culminate in the development of a set of collectively identified community goals. To develop their Strategic Plan, OCUW began with national research and data, as well as local data identified through sources like the Community Indicators, Conditions of Children, and Workforce Indicators reports. OCUW then brought together hundreds of leaders and stakeholders with expertise and interest in four core areas critical to self-sufficiency for all residents in Orange County:

- Education
- Health
- Income
- Housing

Local experts in the four topic areas were interviewed, committees for each topic area were formed, and a series of meetings and community forums were held with diverse representatives from business, nonprofit, volunteer, government, and community sectors. Out of these sessions, community aspirational goals were identified along with specific, measurable targets for improvement over the next 10 years in the four areas.

Expanded roles for OCUW were also identified – beyond their traditional role of funding – to impact the goals discussed. These potential roles include: advocacy, community education, facilitating community-level solutions by bringing entities and efforts together, and continuing their role as a funder to help achieve the identified community aspirations. OCUW is preparing a report detailing the results of its strategic planning and community engagement process, and is further refining goals and an implementation plan for the organization moving forward based on such results.

Envisioning Orange County's Future

The objective of community forums hosted by OCUW was to dialogue and dream about Orange County's future. OCUW asked, "What will our children and residents need to thrive? How can we establish aspirational goals in each of these four areas? And in 10 years, what would we want the newspaper headline to be about our progress toward achieving those goals?"

Common Themes From the Community

Focus on Children and Families Most at Risk

Improving overall county conditions will require reducing disparities between the highest achieving communities and areas warranting most improvement in educational attainment, income, housing and health.

Improve Family Self-Sufficiency

Efforts must recognize that youth live within families and focusing on the youth will entail focusing on the family.

Emphasize Prevention and Early Intervention Strategies

Prevention and intervention early to reduce greater risk "downstream" is a critical strategy.

Build Public Awareness as a Prevention Strategy and to Develop Community Support

Targeted family education and broader public awareness about issues faced by Orange County families are strategies that should be embedded within all four goals.

Long-Term Commitment is Necessary, with Shared Agreement on Establishing 10-Year Goals

During community discussions, the importance of maintaining a long-term focus on the aspirational goals and targeted improvements was emphasized. Achieving movement on these goals is not a short-term effort and will require new partnerships, coalitions and collaborations – all of which will require a long-term perspective and consistent effort.

Community Goals Identified Through United Way's Community Engagement Process

Education	
Aspiration Every Orange County youth receives a high quality and relevant education.	10-Year Goal Cut the high school dropout rate in half.
Income	
Aspiration Orange County families have the capability to become financially stable.	10-Year Goal Increase the percentage of financially stable Orange County families.
Health	
Aspiration The next generation in Orange County is the healthiest in the nation.	10-Year Goal Increase by 1/3 the number of healthy youth in Orange County.
Housing	
Aspiration Homelessness for children and their families is no more.	10-Year Goal Cut the percent of homeless and housing insecure children in half.

Source: Orange County United Way (www.unitedwayoc.org)

Collective Impact

In addition to OCUW, several other Orange County organizations are working to address countywide issues, using data about community conditions to inform goal-setting, priorities and investment. Not surprisingly, these organizations have identified similar issues of importance to the county. The following examples highlight how multiple organizations are addressing the common issue of housing to make a collective impact in the region.

In 2012, the **Children and Families Commission of Orange County** released a special report on young children and rising homelessness in Orange County. The report, "*Homeless Children Ages 5 and Younger in Orange County*," showed a 20% increase in homeless children in fiscal year 2011/2012 over the prior year. Persistent unemployment, lack of affordable housing and poverty are the driving forces behind the sobering spike. The report contained specific, long-range recommendations for the Children and Families Commission in its effort to help end homelessness in Orange County including:

- Continue to play a leading role in the Commission to End Homelessness.
- Strengthen homeless data reporting and analysis.
- Expand the number of shelter beds available to children and their families, to ensure they have safe shelter as they work to regain self-sufficiency.

Also in 2012, the **Orange County Community Foundation (OCCF)** launched ConnectOC, a report and website showcasing critical needs and promising strategies in three key areas: the safety net (housing, food and employment); health and wellness; and education. Through a partnership with McKinsey & Co., focus areas were identified using a data-driven assessment of community conditions and dialogue with community leaders. Through ConnectOC, OCCF aims to facilitate greater community engagement to address local needs. Specific to housing, OCCF seeks to increase resources for individuals and families facing homelessness and improve access to affordable housing by offering information about organizations working in these areas through its website (www.connectoc.org).

The **Orange County Business Council (OCBC)** has four core initiatives: infrastructure, workforce development, economic development, and workforce housing. Every few years, the organization releases the "Workforce Housing Scorecard" which examines data and presents a picture of the state of workforce housing in Orange County. The purpose of the research is to foster dialogue about key trends in housing supply and affordability, and the related implications for the overall regional economy and business community. At the 2012 presentation of the Workforce Housing Scorecard, OCBC facilitated a dialogue among the many community organizations attending about ways to address the need for sufficient workforce housing. Several opportunities were discussed, including implementing a regional rather than city-by-city approach in order to motivate action including sharing of best practices, replication of successful models, and ultimately, increased workforce housing for Orange County.

As described previously, the **OCUW** strategic planning effort outlined specific housing-related roles for OCUW, including:

- Create a “backbone” organization to drive collective impact on family homelessness and affordable housing.
- Improve the quality and accessibility of data, including driving towards a single location for quality data on homelessness, cost studies, and accurate counts of homeless individuals and families.
- Increase affordable housing stock for families through advocacy and education.
- Raise awareness about the scope and impact of family homelessness.

As OCUW’s Strategic Plan moves to implementation, the Children and Families Commission looks to eliminate family homelessness, OCBC tackles workforce housing, and ConnectOC gains visibility and traction for shelter solutions, there is an immediate opportunity to establish a common agenda, pool resources, and work collectively to efficiently address the critical issues facing the county. Housing is just one example of an opportunity to move from data to action, collectively and for the good of all Orange County residents and businesses. Without this collaborative approach, individual agencies will have difficulties moving the bar in any significant or lasting way. However, many organizations moving in the same direction can move the bar, and make a difference together in for the long-term good of our community.

Making a Positive Community Change

In 2011, John Kania and Mark Kramer published an article on “Collective Impact” in the *Stanford Social Innovation Review* (Winter 2011). The article asserts that “large-scale social change requires broad cross-sector coordination” and the authors demonstrate this belief with several examples of positive community change that was accomplished not by the intervention of successful but isolated, individual entities, but through the collective effort of multiple organizations with a common goal. Kania and Kramer analyze why Collective Impact works, outlining five conditions for a successful collective community effort:

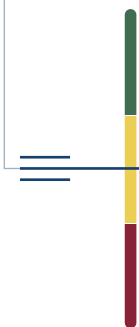
1. a common agenda
2. shared measurement systems
3. mutually reinforcing activities
4. continuous communication
5. a backbone support organization

The concept of Collective Impact was discussed extensively as part of Orange County United Way’s strategic planning effort, and became a unifying theme for participants as they discussed steps that will be required to make progress toward the community’s aspirational goals.

Source: Kania, J. and Kramer, M. “Collective Input.” *Stanford Social Innovation Review*. (Winter 2011)



Economic and Business Climate



With computer and electronic exports leading the way, **world trade** rebounded to the highest level on record – more than **double** Orange County’s exports of 10 years ago. **Home prices** are on the **rise**, and **employment increased** after four years of job losses. However, the county’s cost of living remains **high** as does the **cost of doing business**.

NATIONAL PEERS

Austin, Boston, Dallas, Minneapolis, Seattle

CALIFORNIA PEERS

Sacramento, San Francisco, San Jose

NEIGHBORS

Los Angeles, Riverside/San Bernardino, San Diego

Orange County is Back in Top 100

Description of Indicator

This indicator measures Orange County's business climate through *Forbes* magazine's "2012 Best Places for Business" regional rankings. The *Forbes* ranking compares metropolitan areas using 12 metrics related to job growth, income growth, projected economic growth, educational attainment, crime rates, cultural and recreational opportunities, number of highly ranked colleges, and net migration patterns.

Why is it Important?

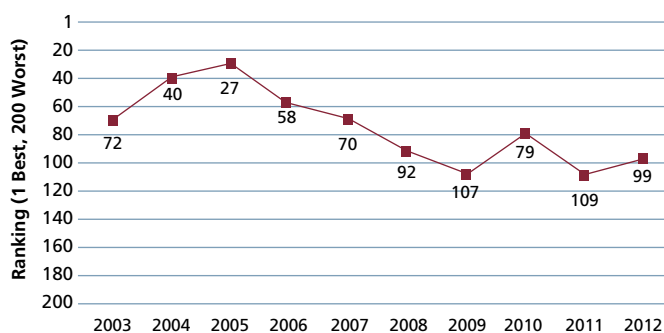
A region's business climate reflects its attractiveness as a location, the availability of business support and resources, opportunities for growth, and barriers to doing business. Since businesses provide jobs, sales tax revenue, economic growth, and entrepreneurship opportunities, a strong business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

How is Orange County Doing?

Orange County's ranking improved in 2012:

- *Forbes*' 2012 national rankings placed Orange County at 99th out of 200 metro areas ranked.
- This is an improvement of 10 places since the previous year, but the county remains behind all peers compared except Riverside/San Bernardino and Los Angeles.
- Orange County ranks well in educational attainment, but poorly in the cost of doing business and job growth. Because job growth tends to be a lagging indicator, the recent upswing in Orange County job creation is likely not yet reflected in this ranking.
- *Forbes* calculates Orange County's cost of living at 42.8% above the national average.
- Orange County's peak ranking was 10th in 2002.

Best Places for Business Ranking
Orange County, 2003-2012



Note: Through 2005, the ranking was out of 150 metro areas. In 2006, the ranking was expanded to include 200 metro areas.

Source: *Forbes Magazine*, June 27, 2012 (www.forbes.com/best-places-for-business/list)

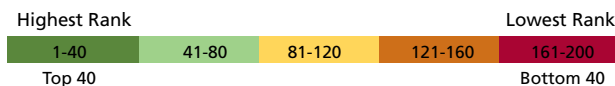
Best Places for Business Ranking, by Component
Orange County, 2012

Component	Rank
Educational Attainment	24
Cost of Doing Business	169
Job Growth	181
Overall	99

Source: *Forbes Magazine*, June 27, 2012 (www.forbes.com/best-places-for-business/list)

Best Places for Business Ranking
Regional Comparison, 2008-2012

	2008	2009	2010	2011	2012
Dallas	93	32	26	10	8
Austin	47	8	10	7	9
Seattle	20	17	18	13	16
Minneapolis	103	76	57	34	22
San Francisco	166	127	38	37	23
San Jose	174	115	48	35	28
Boston	160	90	67	52	45
San Diego	106	104	89	64	75
Orange County	92	107	79	109	99
Riverside/San Bernardino	78	94	88	99	103
Los Angeles	154	180	120	114	123



Source: *Forbes Magazine*, June 27, 2012 (www.forbes.com/best-places-for-business/list)

Tourism Employment Grows

Description of Indicator

This indicator measures visitor spending on accommodations, food, recreation, retail products, and travel arrangements, as well as tax revenue generated within the county by visitor spending. Travel industry employment trends are also included.

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 nearly 15% of the county's employment (see Employment indicator). Hotels, shops, restaurants, and entertainment venues rely on the tourism market for a significant percentage of their business. Moreover, cities within the county benefit from tax revenue generated by visitor spending.

How is Orange County Doing?

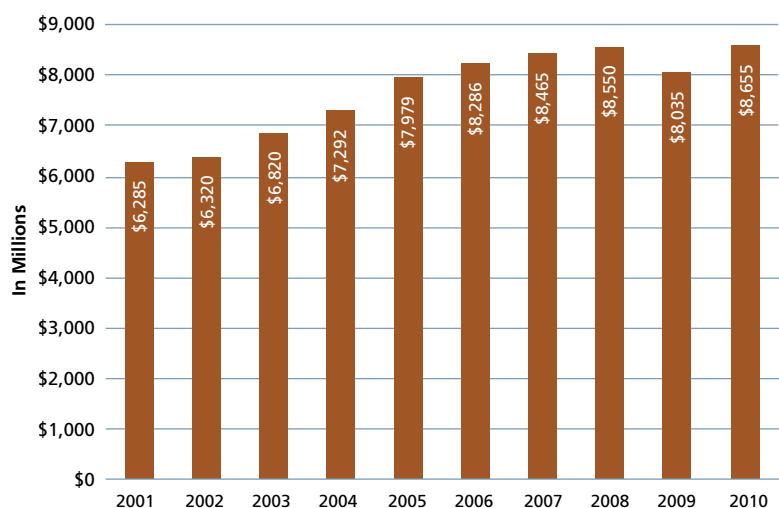
After two years of losses, the number of tourism-related jobs rose in 2011:

- In the last year, tourism-related jobs grew by 5,050, to 169,229 jobs in 2011.
- The average annual salary for jobs in the tourism sector was estimated at \$22,555 in 2011, a slight increase over 2010 (see Employment indicator).

Overall spending and tax receipts rebounded in 2010:¹

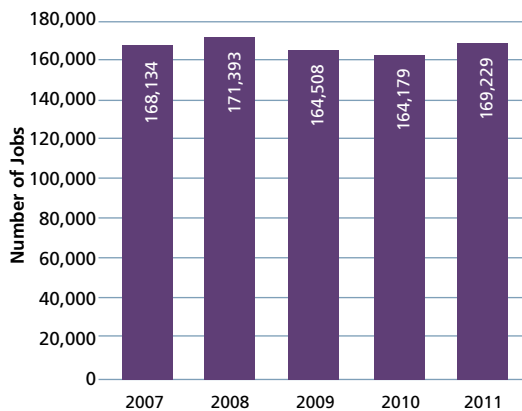
- Visitor spending in Orange County totaled \$8.66 billion in 2010, up from \$8.04 billion in 2009.
- Similarly, Orange County tourism generated \$552 million in 2010 – compared to \$509 million in 2009 and \$544 million in 2008.
- Despite the losses in 2009, both Orange County visitor spending and tax receipts have grown an average of about 4% annually since 2001.
- Among California peers and neighbors, Orange County has the second highest rate of tax receipt growth (+14% since 2005).

Visitor Spending
Orange County, 2001-2010



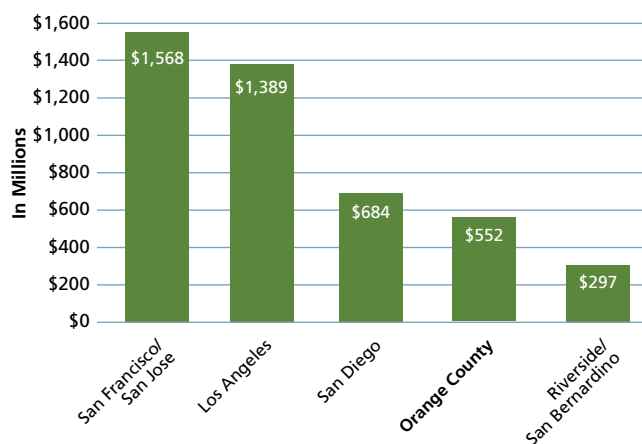
Source: California Division of Tourism, California Travel Impacts by County, Dean Runyan Associates (<http://industry.visitcalifornia.com/Research/>)

Tourism-Related Employment
Orange County, 2007-2011



Source: California Employment Development Department

Tourism-Related Tax Receipts
Regional Comparison, 2010



Source: California Division of Tourism, California Travel Impacts by County, Dean Runyan Associates (<http://industry.visitcalifornia.com/Research/>)

¹ 2011 spending and tax receipt data was not available at time of publication.

Highest Export Volume on Record

Description of Indicator

This indicator measures the change in dollar value of Orange County exports, including exports by destination as well as the leading exports by type of commodity.

Why is it Important?

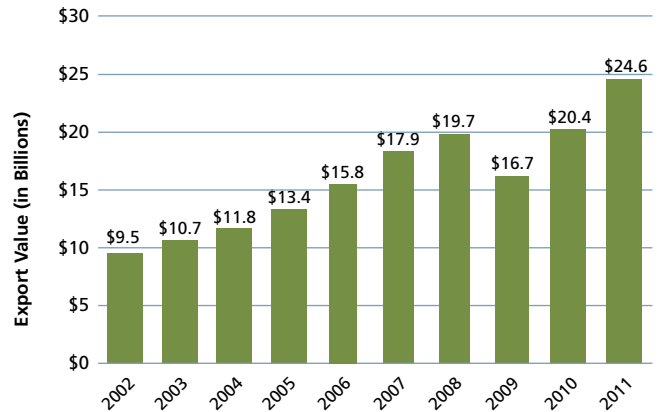
The ability to access foreign markets is important for a strong and growing local economy. Currently, exports comprise over 10% of Orange County's Gross Metropolitan Product and generate thousands of local manufacturing jobs. Trade agreements like the North American Free Trade Agreement (NAFTA) and the U.S.-Korea Free Trade Agreement continue to expand markets for Orange County businesses. The county's location on the Pacific Rim, proximity to the Ports of Long Beach and Los Angeles, and diverse foreign-born population with international networks make Orange County well positioned for international trade.

How is Orange County Doing?

Orange County exports rose significantly in 2010 and 2011:

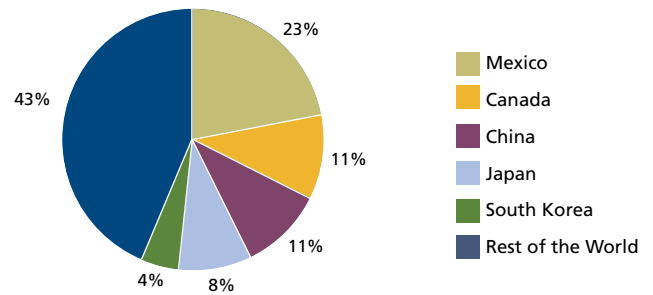
- After declining in 2009, Orange County exports increased to \$20.4 billion in 2010 and to \$24.6 billion in 2011, surpassing pre-recession levels.
- This growth translates to a 20.2% increase from 2010 export levels, on top of a 22.2% increase the prior year.
- In 2011, Orange County's largest single-country export destinations included Mexico (\$5.8 billion), Canada (\$2.8 billion), China (\$2.6 billion), Japan (\$2.0 billion) and South Korea (\$1.0 billion).
- Orange County exports are concentrated in high-tech industries dominated by computer and electronic products. Other top exports include transportation equipment, chemicals, food, machinery, and petroleum and coal products.

Total Orange County Exports Worldwide, 2002-2011



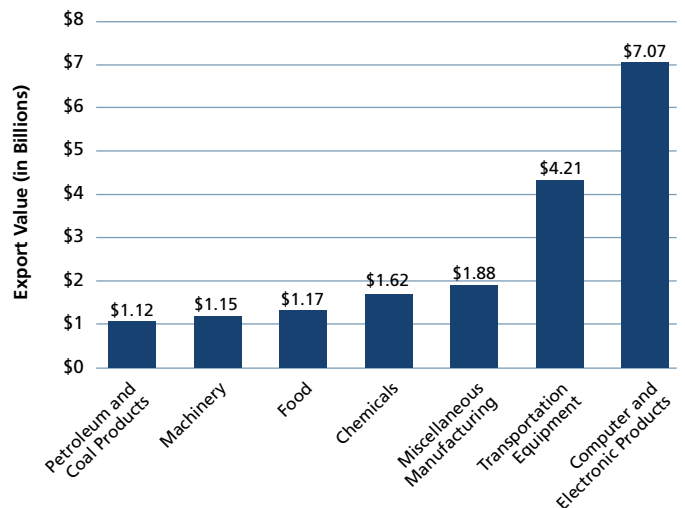
Source: Institute for Economic and Environmental Studies, California State University Fullerton

Orange County Exports by Destination, 2011



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

Orange County Exports by Sector, 2011



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

Income Growth Modestly Outpacing Inflation

Description of Indicator

This indicator compares per capita personal income relative to inflation and measures cost of living. Total personal income includes wages and salaries, proprietor income, property income, and transfer payments, such as pensions and unemployment insurance. The cost of living index compares the prices of housing, consumer goods, and services in Orange County and peer metro areas.

Why is it Important?

An above average and growing per capita income for Orange County residents is crucial in the context of high housing costs and overall cost of living. Current residents – particularly young workers – may decide to move to more affordable areas if incomes cannot keep pace with the cost of living. In addition, a high cost of living relative to peer markets can make Orange County less attractive as a destination for businesses and workers, and may push existing businesses to relocate to more affordable regions.

How is Orange County Doing?

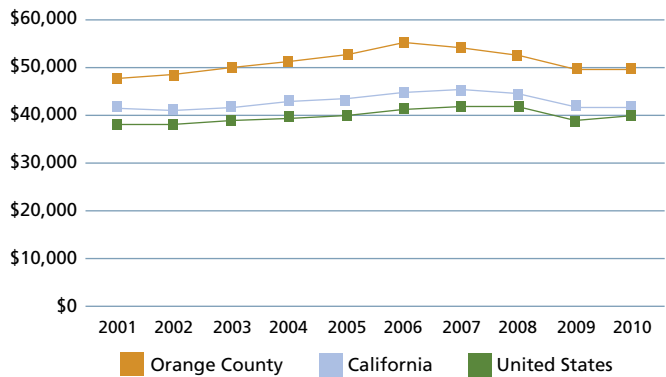
Orange County’s per capita income is up slightly:

- In 2010, per capita income in Orange County was \$49,863, up 0.3% since 2009 when adjusted for inflation.
- Since 2001, income growth in Orange County slightly outpaced inflation, resulting in a 4.1% net increase in buying power.
- The county outpaced 10-year income growth in California (0.4%) and the United States (3.7%).
- Among peer and neighboring markets, Orange County ranks in the middle in per capita income, but above both national and California averages.

Orange County’s cost of living remained high:

- With 100.0 being average, Orange County measured 142.5 on the Cost of Living Index in 2012, down from 143.9 in 2011 and 146.5 in 2010.
- Orange County’s high cost of living is driven by high housing prices relative to other markets.
- When comparing per capita income and cost of living among peers, Southern California counties have the largest differential between the two.
- This translates to less discretionary income, reduced ability to pay off debt, and lower wealth creation over time compared to areas where income and cost of living are more aligned.

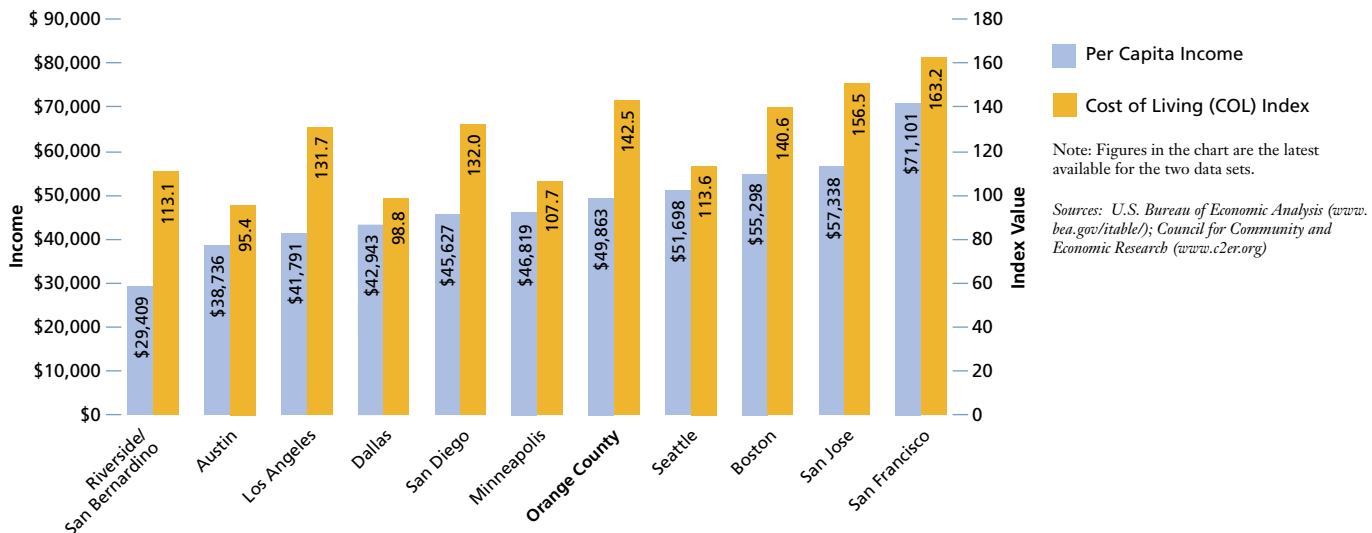
Per Capita Income (Inflation Adjusted to 2010 dollars)
Orange County, California, and United States, 2001-2010



Note: Data updated annually by data source.

Source: U.S. Bureau of Economic Analysis (www.bea.gov/itable/), and Bureau of Labor Statistics, Consumer Price Index

Per Capita Income Compared to Cost of Living Index
Regional Comparison, 2010 (Income) or 2nd Quarter 2012 (COL)



Note: Figures in the chart are the latest available for the two data sets.

Sources: U.S. Bureau of Economic Analysis (www.bea.gov/itable/); Council for Community and Economic Research (www.c2er.org)

Construction Industry Grows; Unemployment Falls

Description of Indicator

This indicator calculates average employment and salaries in 10 major Orange County industry clusters, which account for over half of Orange County jobs. It also shows unemployment rates in Orange County.

Why is it Important?

The dynamics of employment size and composition illustrate how Orange County's economy is evolving and responding to macro economic forces. Tracking salary levels by cluster shows whether jobs in these clusters can provide a wage high enough for workers to afford to live in Orange County.

How is Orange County Doing?

Economic recovery led to employment growth in seven out of 10 major industry clusters between 2010 and 2011:

- Computer Hardware and Computer Software rebounded the most during this period (up 9% and 6%, respectively).
- Construction, which was hit hard by the recession, posted respectable employment gains in 2011, as did Tourism (both up 3%).
- Health Services (+1%) and Biomedical (+2%) maintained their relatively stable growth rates.
- Employment in Energy and Environment (-1%), Defense and Aerospace (-4%), and Communications (-8%) continued to shrink.

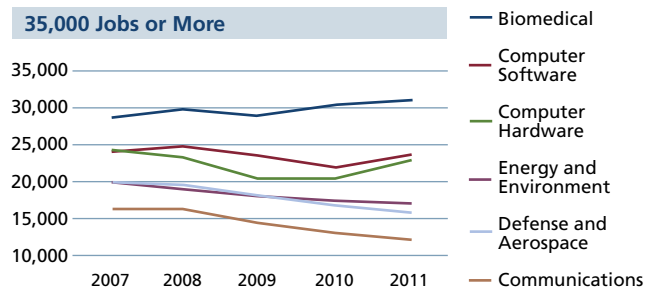
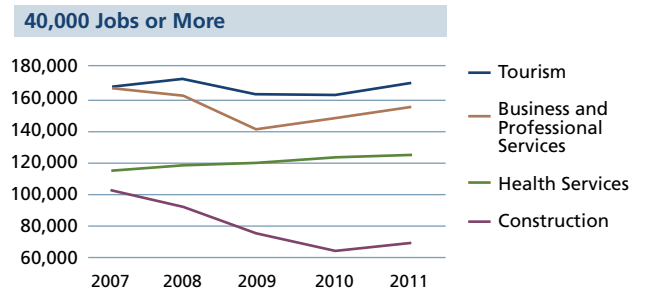
Between 2010 and 2011, average salaries rose in most major clusters:

- Salary growth since 2006 in the clusters of Computer Software, Energy and Environment, Health Services, Computer Hardware, and Business and Professional Services all outpaced inflation. The remainder lagged inflation.
- After dropping through 2009, Construction salaries continued to rebound in 2011.

Orange County's unemployment rate improved:

- At 6.8% in December 2012, Orange County's unemployment rate was better than the 10-year high of 9.9% in January 2010, but far from the 10-year low of 3.1% in December 2006.
- Orange County's December 2012 unemployment rate falls below the state and national rates of 9.7% and 7.6%, respectively.

Employment in Selected Orange County Clusters, 2007-2011



Source: California Employment Development Department

Average Annual Salaries in Selected Clusters Orange County, 2011

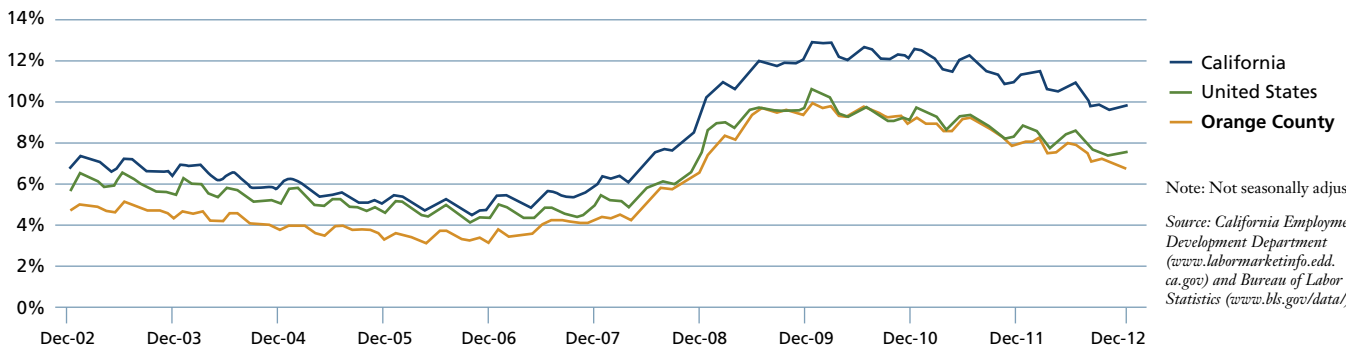
Cluster	2011	Change from 2010
Computer Software	\$101,408	0.2%
Defense and Aerospace	\$96,874	3.3%
Computer Hardware	\$84,261	3.9%
Communication	\$76,615	4.1%
Energy and Environment	\$74,663	3.8%
Biomedical	\$70,504	-3.8%
Business and Professional	\$59,403	1.9%
Construction	\$57,798	1.9%
Health Services	\$54,456	2.1%
Tourism	\$22,555	1.8%

Note: Data have been revised since previously published.

Source: California Employment Development Department

Unemployment Rate

Orange County, California and United States, 2002-2012



Note: Not seasonally adjusted

Source: California Employment Development Department (www.labormarketinfo.edd.ca.gov) and Bureau of Labor Statistics (www.bls.gov/data/)

Gains in Both Jobs and Housing Permits

Description of Indicator

This indicator shows the number of jobs created (or lost) in Orange County divided by new housing permits granted. The resulting ratio is compared to peer metro areas, the state, and nation.

Why is it Important?

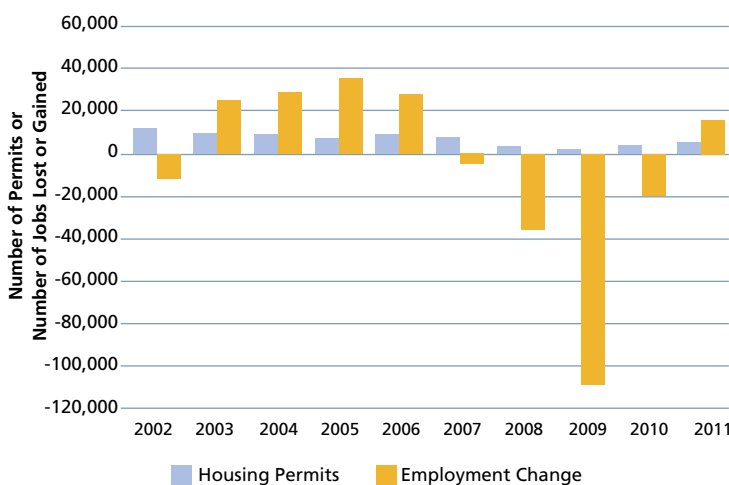
An adequate housing supply is essential for a community's labor force. When an economy is growing, new housing units are needed for the additional workers employed. If this housing demand is unmet, it can drive up home prices and apartment rents beyond what is affordable to many workers and residents. As a result, Orange County workers may choose to live in surrounding counties that offer a greater supply of more affordable housing options, creating longer commutes and traffic congestion.

How is Orange County Doing?

With job gains in 2011, the jobs-to-housing ratio is positive once again:

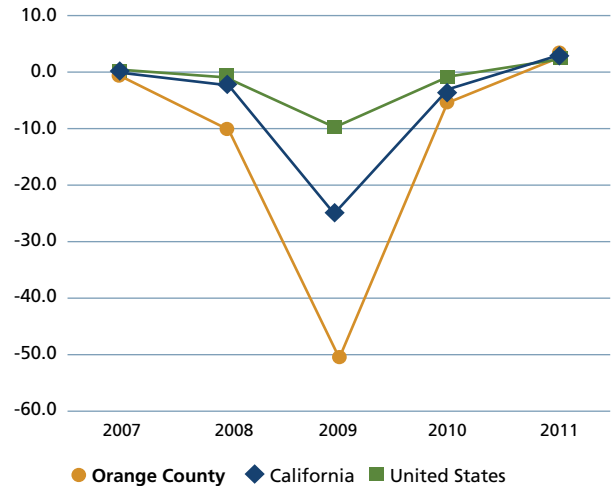
- In 2011, 14,400 jobs were created and 4,352 new housing permits were granted.
- However, these job gains are on the heels of four years of job losses totaling 165,400.
- Thus, housing demand remains depressed as the county slowly recovers from dramatic employment losses in 2009, and more jobs are needed to achieve long-term housing demand balance.
- All markets compared are seeing the beginning of recovery in housing demand, posting positive jobs-to-housing ratios in 2011. This is compared with all but two regions (Boston and Austin) posting job losses the previous year.
- As employment rebounds, the challenge will be for housing creation to keep pace with the returning demand; traditionally, the number of jobs in Orange County has far outpaced new housing production.

Housing Permits Granted and Employment Change Orange County, 2002-2011



Sources: United States Bureau of Labor Statistics, Current Employment Statistics (www.bls.gov/data/); United States Department of Housing and Urban Development (<http://socds.buduser.org/permits/index.html>)

Jobs Created/Lost per Housing Permit Granted Orange County, California, and United States, 2007-2011



Note: Data have been updated since previously reported.

Sources: United States Bureau of Labor Statistics, Current Employment Statistics (www.bls.gov/data/); United States Department of Housing and Urban Development (<http://socds.buduser.org/permits/index.html>)

Housing Demand Regional Comparison, 2011

Region	Housing Permits	Employment Change (Jobs) 2010 to 2011	Ratio of Employment Change to Permits
San Jose	3,097	23,000	7.43
Minneapolis	5,148	30,000	5.83
Orange County	4,352	14,400	3.31
San Francisco	5,783	16,300	2.82
California	45,471	123,800	2.72
United States	624,536	1,485,000	2.38
Dallas	26,351	60,800	2.31
Seattle	11,230	24,900	2.22
Austin	10,239	21,900	2.14
Los Angeles	9,895	21,000	2.12
Boston	6,139	12,400	2.02
San Diego	5,370	8,400	1.56
Riverside/San Bernardino	4,736	3,800	0.80

Sources: United States Bureau of Labor Statistics, Current Employment Statistics (www.bls.gov/data/); United States Department of Housing and Urban Development (<http://socds.buduser.org/permits/index.html>)

Home Prices Increase but Remain Relatively Affordable

Description of Indicator

This indicator measures change in the median sale price of an existing single-family detached home and uses the California Association of Realtors' First-Time Homebuyer Housing Affordability Index to measure the percentage of Orange County households that can afford a home. Annual salaries in common or growing occupations are compared to the minimum income needed to qualify for financing.¹

Why is it Important?

High relative housing prices, particularly challenging for first-time buyers, adversely impacts our workforce by discouraging young workers from moving to or remaining in Orange County. A lack of affordable housing results in longer commutes, leading to increased traffic congestion and pollution, decreased productivity and diminished quality of life. Homeownership increases stability for families and communities, and can provide long-term financial benefits.

How is Orange County Doing?

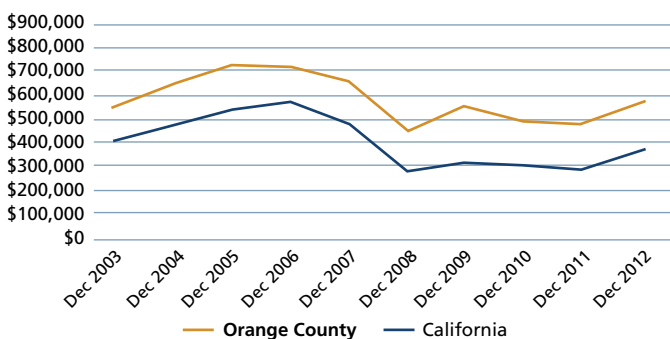
Housing prices are rising:

- In December 2012, the median home sale price in Orange County was \$582,930, a 20% increase from the previous year (\$484,630 in December 2011).
- On average, median home sale prices in 2012 were roughly \$25,000 higher than in 2011.
- Orange County's median price was \$216,000 more than the state's median price.

Housing remains more affordable:

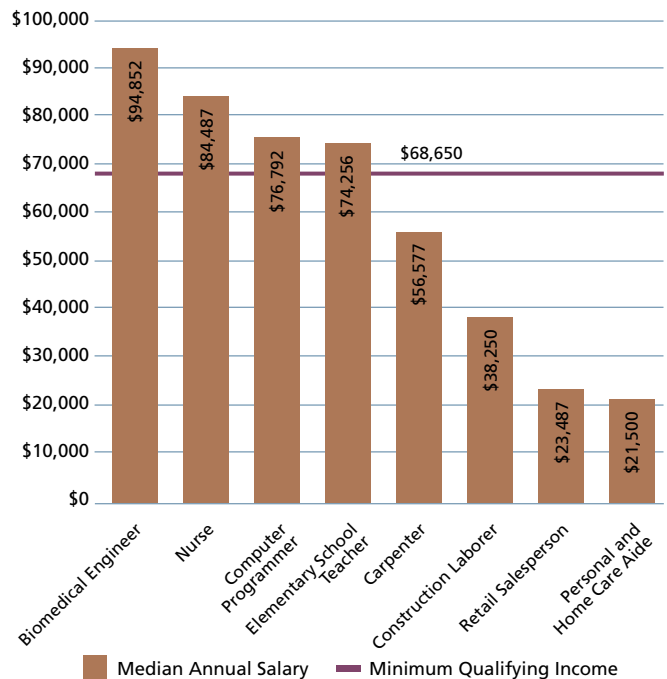
- The minimum household income needed for a first-time homebuyer to purchase an existing single-family home priced at 85% of the Orange County median price (\$476,270) is approximately \$68,650.
- Third quarter 2012 results indicate 57% of households in Orange County could afford this price.
- This is slightly less affordable than 2011 (59%) but more affordable than 10 years ago (44% in 2003).
- Orange County remains less affordable than all peers compared except the San Francisco Bay Area (also 57%).

Median Single-Family Home Sale Price
Orange County and California, December 2003 - December 2012



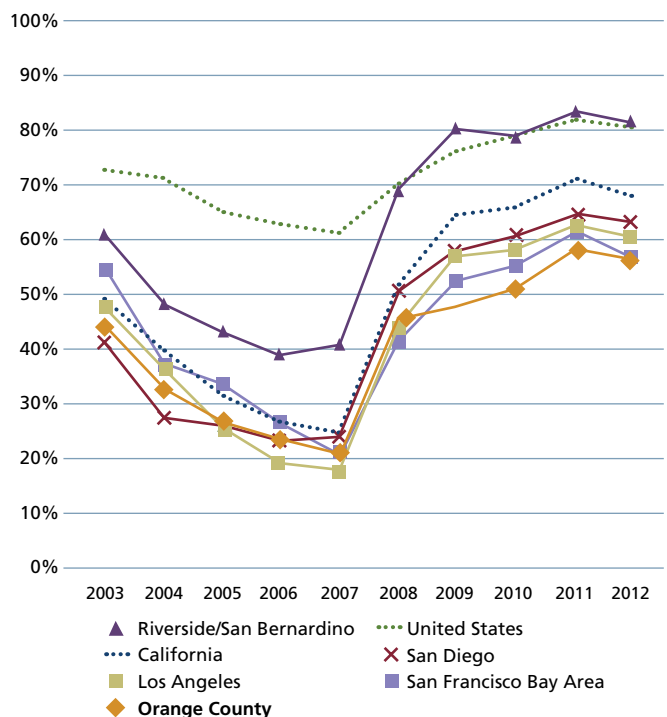
Source: California Association of Realtors

Income Needed to Afford a Home Compared to Salaries in Selected Occupations
Orange County, Third Quarter 2012



Sources: California Association of Realtors; California Employment Development Department

First-Time Homebuyer Housing Affordability Index
Regional Comparison, Third Quarter 2003-2012



Source: California Association of Realtors (www.car.org)

¹ The California Association of Realtors' First-Time Buyer Housing Affordability Index parameters for 2012 are 10% down and the prevailing 1-year adjustable interest rate as reported by Freddie Mac (www.freddiemac.com/pmms/pmmsarm.htm) used towards the purchase of an existing single-family detached home priced at 85% of the county median price.

Hourly Wage of \$25 Needed to Rent a One-Bedroom

Description of Indicator

This indicator measures the Housing Wage – the hourly wage a resident needs to afford “Fair Market Rent” (the median rent in the Orange County market). The Housing Wage is also compared to median wages among selected common and/or growing occupations in Orange County. “Affordable” is defined as spending 30% or less of total income on rent.¹

Why is it Important?

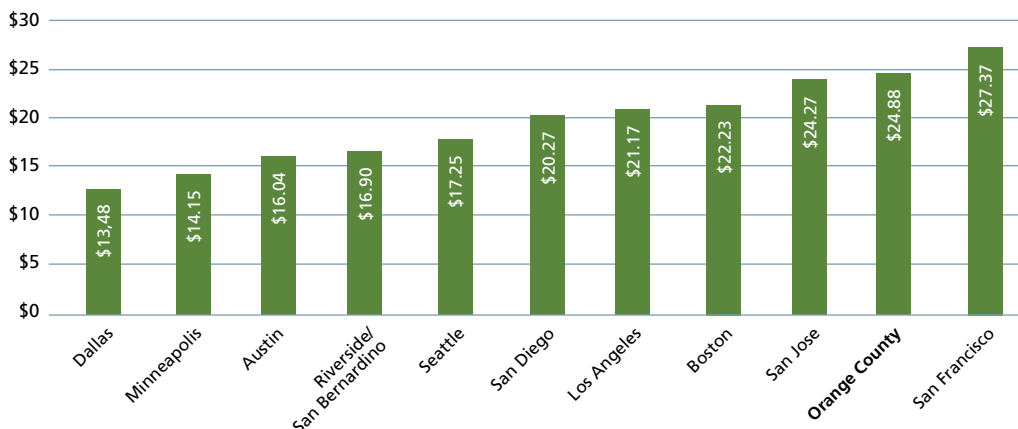
Lack of affordable rental housing can lead to overcrowding and household stress. Less affordable rental housing also restricts the ability of renters to save for a down payment on a home, limiting their ability to eventually realize the long-term advantages of owning a home. Ultimately, a shortage of affordable housing for renters can perpetuate a cycle of poverty.

How is Orange County Doing?

Orange County’s Housing Wage fell:

- In 2013, the hourly wage needed to afford a one-bedroom unit dropped to \$24.88, down from \$26.62 in 2012 and \$25.52 in 2011. The 2013 Housing Wage is equivalent to an annual income of \$51,760.
- Some renters may be benefitting from a modest drop in median rents while at the same time, median wages in common or growing occupations are returning to, or surpassing, pre-recession levels.
- Still, Orange County continues to have the second highest Housing Wage (less affordable housing) compared to peer metro areas.
- A minimum-wage worker must work 124 hours per week to afford a one-bedroom unit at fair market rent in Orange County.

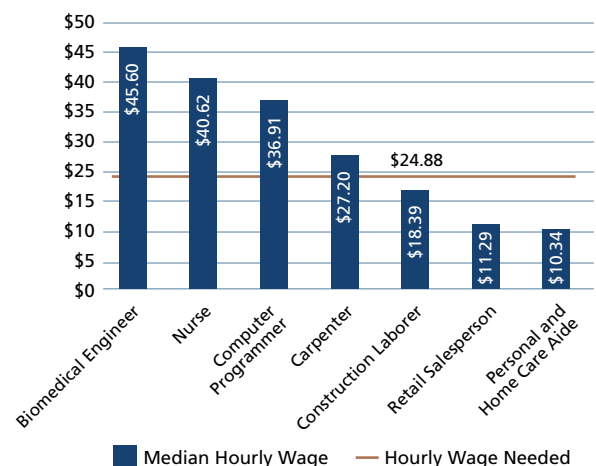
Hourly Wage Needed to Afford a One-Bedroom Unit Regional Comparison, 2013



Renting in Orange County

	2012	2013
Fair Market Rent (Monthly)		
One Bedroom	\$1,384	\$1,294
Two Bedroom	\$1,652	\$1,621
Three Bedroom	\$2,338	\$2,268
Amount a Household Earning Minimum Wage Can Afford to Pay in Rent (Monthly)	\$416	\$416
Number of Hours per Week a Minimum Wage Earner Must Work to Afford a One-Bedroom Apartment	133	124

Hourly Wage Needed to Afford a One-Bedroom Unit Compared to Wages in Selected Occupations Orange County, 2012



Sources: Community Indicators Report analysis of Fair Market Rent data from the U.S. Department of Housing and Urban Development (www.buduser.org) using the methodology of the National Low Income Housing Coalition (www.nlihc.org); California Employment Development Department (www.edd.ca.gov)

¹ The Housing Wage data in this indicator reflects 2013 Fair Market Rent as reported by the U.S. Department of Housing and Urban Development (HUD).

Note: Wage data is for third quarter 2012. Hourly wage needed (Housing Wage) is for 2013.

After Years of Decline, Commuter Rail Ridership Grows

Description of Indicator

This indicator tracks commute times and hours of vehicle delay due to congestion on freeways. It also measures ridership on Orange County's bus and commuter rail systems.

Why is it Important?

The ability of residents and workers to move efficiently within Orange County is important to quality of life and a prosperous business climate. Long commutes impact personal lives and worker productivity due to the time lost in transit. In addition, an effective public transit system is essential for the mobility of individuals who cannot afford, are unable, or choose not to drive a car. Driving less and relying more on public transit can improve air quality and limit dependence on fossil fuels.

How is Orange County Doing?

For the past several years, commute times have remained steady:

- Between 2008 and 2011, the average commute time to work for Orange County residents was approximately 26.0 minutes.
- This falls in the middle among peers, with Riverside/San Bernardino on the high end at 31.6 minutes and Minneapolis on the low end at 23.0 minutes.

Delay due to congestion exacts a considerable cost:

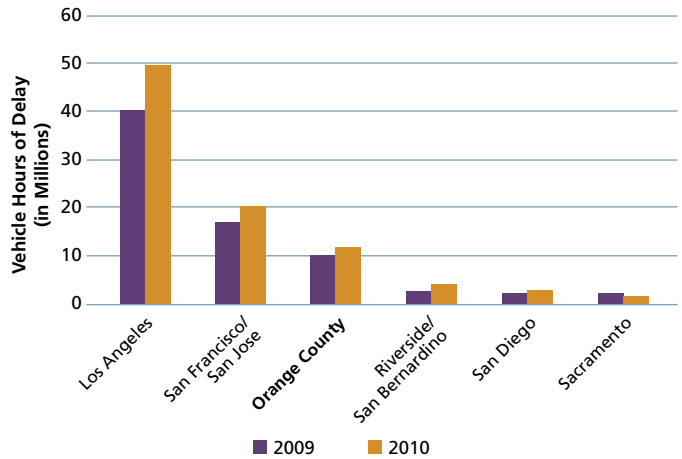
- In 2010, there were 12.3 million annual vehicle hours of delay on Orange County freeways, a 26% increase from the previous year.
- Orange County had the third greatest number of hours of delay among California regions compared.
- According to Caltrans' preliminary calculations, vehicle delay in Orange County in 2010 resulted in an additional 207,229 tons of CO₂ released into the air compared to what would have been emitted at free-flow speeds. Further, the cost of the extra fuel used as a result of vehicle delay totaled \$78.5 million.
- In terms of productivity, lost time due to vehicle delays equates to wage and salary losses of \$180.9 million or \$495,610 per day in Orange County in 2010.

Rail ridership rose while bus ridership declined:

- Total ridership on Orange County's three commuter rail lines increased 8% to 4,177,791 riders in 2011/12, after decreasing less than 1% the previous year.
- All three rail lines experienced increases in ridership: the Orange County Line increased 9%, the 91 Line increased 8%, and the Inland Empire/Orange County Line increased 5%.¹
- Between 2008 and 2010, Orange County Transportation Authority (OCTA) reduced bus service by approximately 20% due to funding shortfalls, and ridership declined 18% during the same period.
- In 2011 overall bus boardings decreased another 4%, dropping from 53.4 million trips in 2010 to 51.3 million in 2011.

¹The Orange County Line runs between Oceanside and downtown Los Angeles; the 91 Line parallels State Route 91; and the Inland Empire/Orange County Line runs between San Bernardino and San Juan Capistrano.

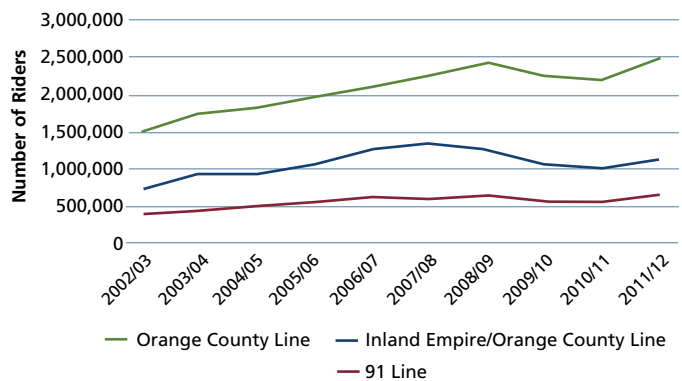
Annual Vehicle Hours of Delay
Regional Comparison, 2009 and 2010



Note: Data for 2010 is preliminary. As defined by Caltrans, the following regional boundaries include: Sacramento (Butte, Colusa, El Dorado, Glenn, Nevada, Placer, Sacramento, Sierra, Sutter, Yolo, and Yuba counties); San Francisco/San Jose (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma counties); Los Angeles (Los Angeles and Ventura counties); and San Diego (Imperial and San Diego counties).

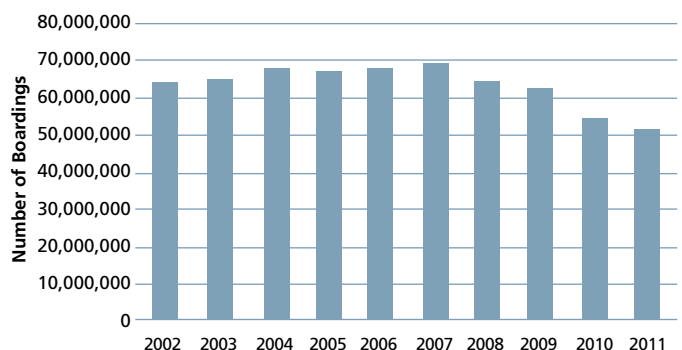
Source: Preliminary Data from the California Department of Transportation Mobility Performance Report, 2010

Commuter Rail Ridership
Orange County, Inland Empire/Orange County and 91 Lines, 2003-2012



Source: Metrolink

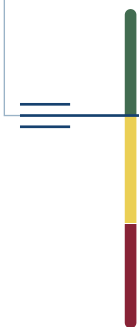
Bus Ridership
Orange County Transportation Authority (OCTA), 2002-2011



Source: National Transit Database (www.ntdprogram.gov)



Technology and Innovation



Diversity in Orange County's high-tech sector is an **asset** to the local economy, yet **growth** in this sector has **slowed**. Venture capital **investment** in the industrial and energy sectors was **strong**, and Orange County's growth in patent grants outpaced the state and nation. **Half** of Orange County adults **use a smartphone** and another 11% plan to purchase one in the coming year.

NATIONAL PEERS

Austin, Boston, Dallas, Minneapolis, Seattle

CALIFORNIA PEERS

San Francisco, San Jose

NEIGHBORS

Los Angeles, Riverside/San Bernardino, San Diego

Tech Economy Diverse; Output Growth Slows

Description of Indicator

This indicator measures high-tech industry diversity, employment concentration, and output growth. Regions with employment concentration values higher than 1.0 in a particular industry, have a greater concentration than the national average. A larger number of concentrated high-tech industries indicates a more diversified technology employment base. High-tech sector output growth is relative to the national average (100.0). Approximately 11% of all Orange County employment falls into the high-tech sectors analyzed.

Why is it Important?

High-tech industries provide strong economic growth potential, offer higher than average wages, and support a broad range of skilled workers and professional services. Regions with a large and diverse high-tech economy have an edge in attracting and retaining high-tech firms because of their deep employment pool and other factors that encourage industry clustering. A diverse high-tech sector is also more resilient during economic downturns than markets that are more reliant on a particular industry.

How is Orange County Doing?

Orange County has a more diverse technology sector than many states with well known high-tech centers:

- Among the states compared, Orange County was the second most diverse with 16 out of 22 high-tech industries having higher employment concentration than the national average.
- This is a slight decline from the five-year high of 18 industry concentrations in 2009.¹

Orange County's overall high-tech employment concentration was above average:

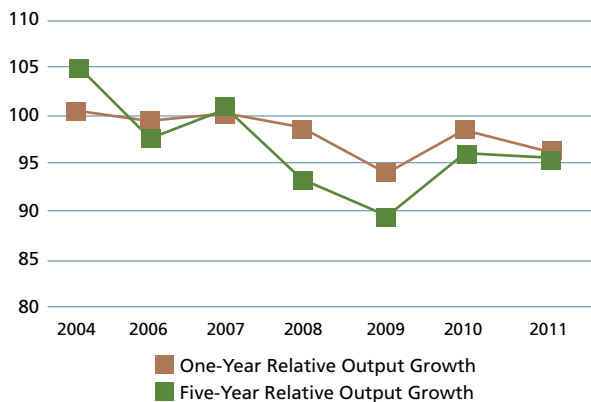
- At 1.50, Orange County compared favorably to the national average of 1.0 and was in the mid-range among states compared.
- Orange County's employment concentration value has not changed significantly over the past five years.¹

Orange County had the second lowest growth in high-tech output among peers compared:

- As of 2011, Orange County's one- and five-year levels of relative high-tech output growth were 98.7 and 96.4, respectively – just below the national average of 100.0.
- After a substantial increase in 2010, Orange County's relative output growth stabilized in 2011.

High-Tech Sector Output Growth Relative to the National Average

Orange County, 2004-2011



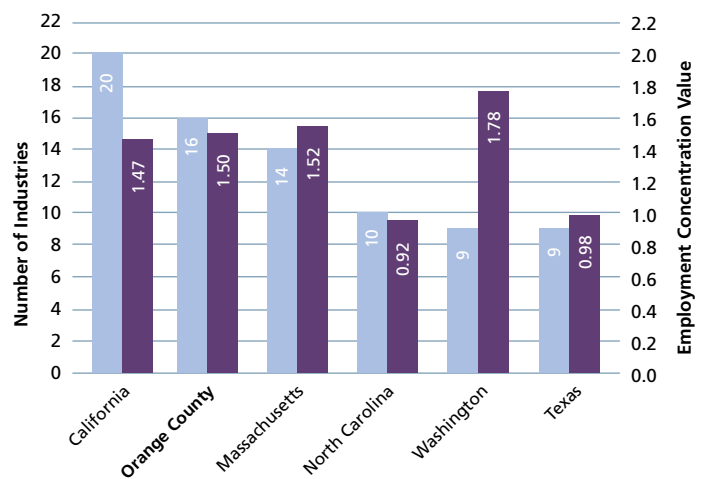
Note: Data not available for 2005. U.S. average value is 100.0.

Source: Milken Institute, Best Performing Cities Report (www.milkeninstitute.org)

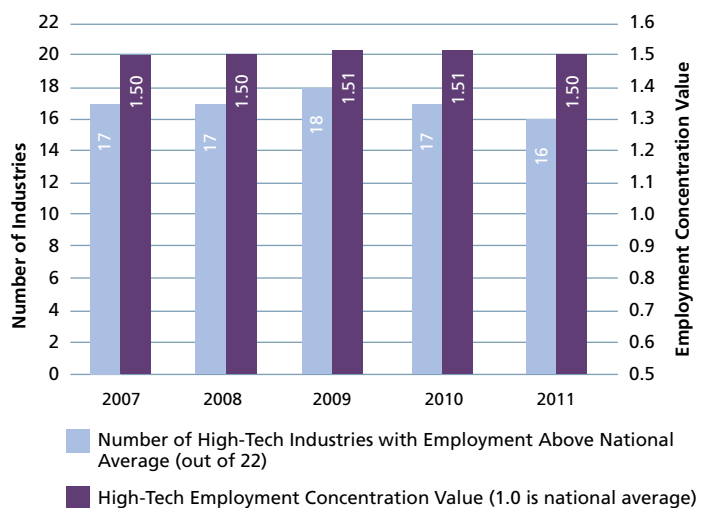
¹These data are not comparable to data presented in previous Community Indicators reports.

High-Tech Sector Employment Concentration and Diversity

Orange County Compared to Selected States, 2011



Orange County Trend, 2007-2011



Note: Due to changes in the industry data, categories, methodology, and classification system used by the Milken Institute, data are not comparable to data presented for this indicator in previous year's reports.

Source: Community Indicators Report analysis of data from the U.S. Bureau of Labor Statistics using high-tech industry selection by Milken Institute in the Best Performing Cities Report

Half of Orange County Adults Own a Smartphone

Description of Indicator

This indicator measures Internet access and use, smartphone ownership, and social networking participation. Social networking is defined as using Internet-based personal and business networking sites, such as Facebook, LinkedIn, Twitter, Pinterest or a similar site. Data are for adults 18 years of age and older (county-level data) or households (national and state data).

Why is it Important?

Use of the Internet is changing the way residents of all incomes and ages work, shop, socialize, and access services. Nationwide, smartphone ownership is growing (from 35% in 2011 to 46% in 2012).¹ Social networking sites continue to attract users for business promotion, advocacy, and entertainment. For some residents, cellular platforms may be replacing – or skipping over – wired computers as the way to access Internet content and connect with friends or business associates. The implications for how governments and businesses interface with customers are extensive, including how products and services are marketed, offered, and accessed.

How is Orange County Doing?

Orange County's Internet access rate is higher than the U.S. Metro Area average:

- Approximately 79% of Orange County adults have Internet access.
- This rate is higher than Los Angeles, Riverside and San Bernardino counties, and the U.S. Metro Area average (75%).²

The platforms for accessing the Internet may be expanding or shifting:

- Nationwide, 77% of households have a computer, handheld device or both, compared with 81% of households in California.³
- In terms of smartphone ownership, 50% of Orange County adults own a smartphone, compared to 46% of adults nationwide.⁴
- Orange County has a slightly higher rate of smartphone ownership than Los Angeles, San Bernardino and Riverside counties.
- 11% of Orange County adults who don't have a smartphone said they plan to buy one in the next 12 months.

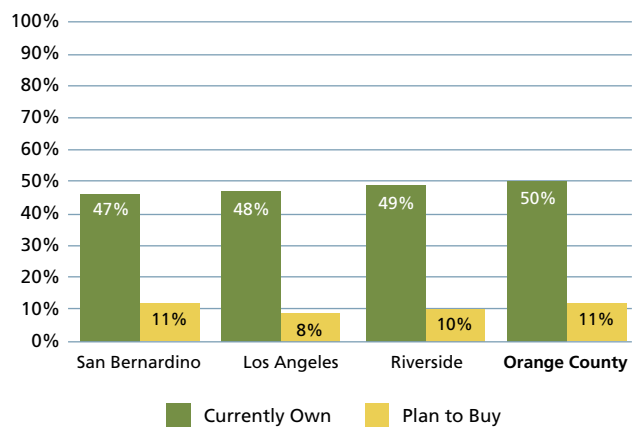
Orange County smartphone users roughly reflect the characteristics of the county's overall population:

- Smartphone ownership by race or ethnicity is nearly proportionate to overall racial and ethnic proportions in the county.
- Higher income individuals are more likely to own smartphones, however, smartphone ownership is fairly evenly distributed among income brackets.
- 28% of residents with a household income of \$50,000 or less own a smart phone in Orange County.
- 34% of Generation X residents (ages 30-44) and 34% of Baby Boomers (ages 45-64) own a smartphone, compared to 25% of Generation Y residents (ages 18-29) and only 7% of seniors (ages 65 and older).
- 42% of adult smartphone owners in Orange County are college graduates, compared to 33% overall.

Social networking for personal or business reasons is popular:

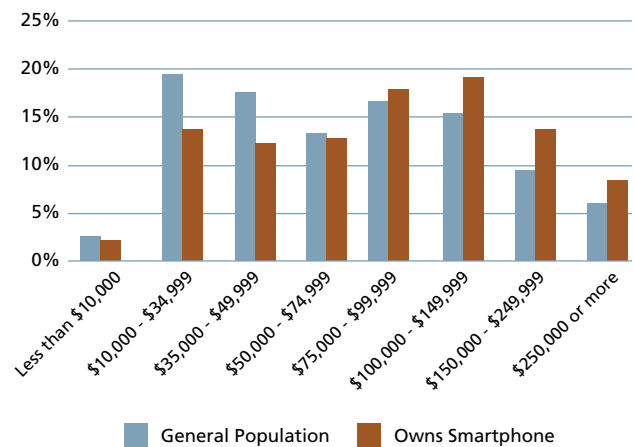
- 55% of Orange County residents use the Internet for social networking, slightly less than in San Bernardino County (57%) and slightly more than Riverside (54%) and Los Angeles (52%).
- 25% of Orange County residents use their cell phone or wireless device for social networking, slightly fewer than Los Angeles and Riverside counties (both 27%) and San Bernardino County (26%).

Smartphone Ownership Among Adults
County Comparison, 2012



Source: Scarborough Research

Smartphone Ownership Compared to the General Population,
by Income
Orange County, 2012



Source: Scarborough Research

¹ Pew Research Center (www.pewinternet.org/Reports/2012/Smartphone-Update-2012.aspx)

² Scarborough Research, 2010

³ U.S. Department of Commerce, Exploring the Digital Nation, November 2011 (www.esa.doc.gov/)

⁴ Fully 88% of Americans own a cell phone (2012 data). Pew Research Center (www.pewinternet.org/Reports/2012/Smartphone-Update-2012.aspx)

Investment and Patents Show Long-Term Growth

Description of Indicator

This indicator measures Orange County businesses' access to venture capital (financing for new companies) by tracking early-stage and emerging business investment among metro areas. It also measures the number of utility patents, or "patents for inventions," granted to inventors based in Orange County.

Why is it Important?

Innovation and the development of new technology are critical for a regional economy's long-term viability. Venture capital facilitates new business growth and exploits new technologies. The number of patent grants awarded for county businesses and residents is a good barometer of both the ingenuity of the local workforce and businesses' commitment to research and development.

How is Orange County Doing?

Orange County inventors outpaced the state and national averages for growth in patents granted:

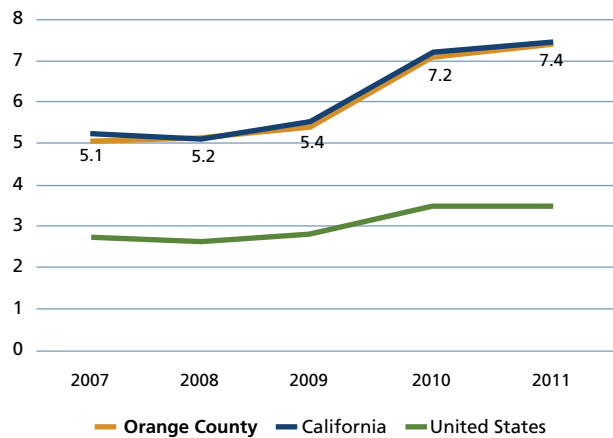
- Patents granted to Orange County residents rose 4% between 2010 and 2011, compared to growth of 3% statewide and 1% nationwide.
- In 2011, there were 2,269 patents granted to Orange County inventors, up 48% from 1,538 in 2007.
- Despite this growth, Orange County ranked eighth among neighboring counties and peer regions for patents per capita in 2010, behind San Jose, San Francisco, Austin, Seattle, San Diego, Boston, and Minneapolis, but ahead of Dallas, Los Angeles and Riverside/San Bernardino.¹

Venture capital investment grew in 2011:

- Venture capital funding in 2011 was \$909.2 million, compared to \$624.2 million in 2010 and \$307.8 million in 2009.
- Investments for the first half of 2012 totaled \$452.9 million, signaling continued strength.
- Local companies in the industrial/energy sector (including electric vehicle design and manufacture) led investments, garnering 52% of the total venture capital invested in Orange County in 2011/12.
- Companies devoted to medical devices and equipment received 30% of investments during the same period.
- In 2011, Orange County's share of national venture capital was approximately 3.1%, an increase from 2.7% in 2010.

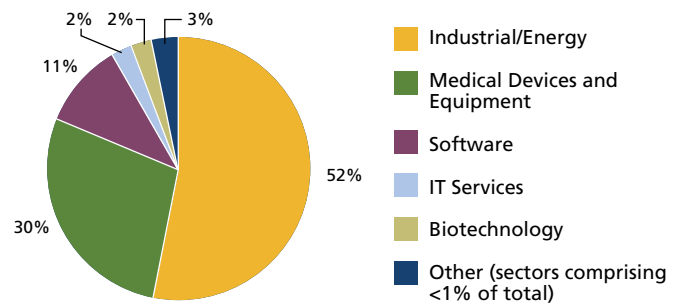
¹Regional comparison data for 2011 was not available at time of publication.

Number of Patent Grants Awarded per 10,000 Residents
United States, California and Orange County, 2007-2011



Sources: U.S. Patent and Trademark Office (www.uspto.gov); U.S. Census Bureau, American Community Survey 1-Year Estimates (www.census.gov)

Venture Capital Investment, by Sector
Orange County, 2011/12



Source: MoneyTree Report prepared by National Venture Capital Association and PricewaterhouseCoopers, based on data provided by Thomson Reuters (www.pwcmoneytree.com/MTPublic/ns/index.jsp)

Venture Capital Investment
Orange County, 2002-2012 (First Half)



Source: Thomson Reuters

Proficiency in Math and Science Courses Improves

Description of Indicator

This indicator measures the scientific and technological know-how of Orange County's future workforce using four metrics: the percentage of public high school students enrolled in an upper level math course (Intermediate Algebra/Algebra II or other advanced math) or science course (first year Chemistry or Physics), the percentage of eighth through 11th grade students who demonstrate achievement in these courses by scoring at a proficient level or better at course completion, the number of K-12 students per computer, and the number of classrooms with Internet access.

Why is it Important?

Computer, math, and science competency are critical in our knowledge- and computer-driven economy. Computer and Internet access are important instructional devices and provide students with indispensable research tools. In addition, enrollment and achievement in upper level math and science courses are required for UC/CSU entry and provide the necessary background for many college-level courses and tech-related jobs (see the Technology-Related Degrees and Employment indicators).

How is Orange County Doing?

A slightly higher proportion of girls took upper level math in 2011/12 than in 2010/11:

- Course-taking by boys and girls for the remaining upper level courses remained unchanged from the previous year.
- 20% of students enrolled in Intermediate Algebra/Algebra II, 14% of students enrolled in other advanced math courses and Chemistry, and 6% took Physics.
- Female enrollment was higher in all subjects except Physics where enrollment was the same for male and female students.

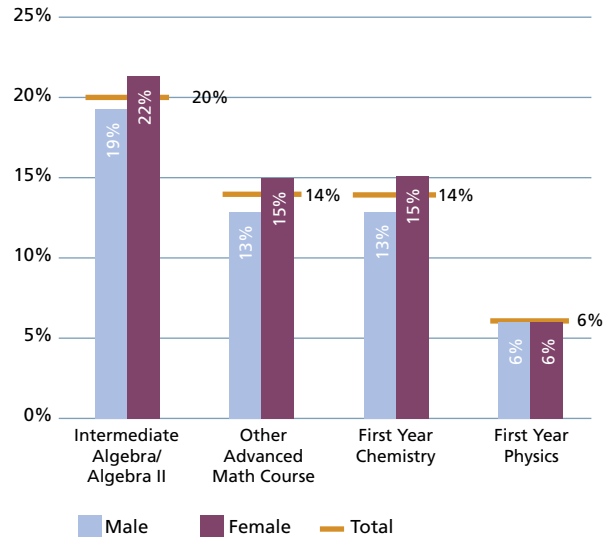
Test scores have gradually improved among eighth through 11th grade students over the past five years:

- Between 2008 and 2012, the proportion of students scoring proficient or better in Physics after completing the course increased from 66% to 70%.
- Proficiency in Chemistry improved from 49% to 62% of students tested at course completion.
- Algebra II proficiency at course completion improved from 41% to 50%.

Fewer classrooms have Internet access and aging computers are contributing to a higher ratio of students per computer:

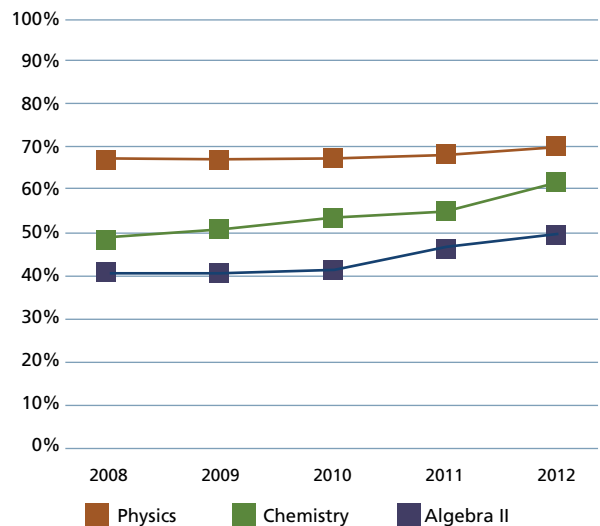
- The number of students per computer less than four years old remained at 6.5 in 2010/11, up from 4.5 students per computer in 2006/07. At 5.8, the statewide ratio is better than Orange County's.
- The number of Orange County classrooms with high-speed Internet varies somewhat from year-to-year, but no upward or downward trend is discernable over the past five years.¹

Upper Level Math and Science Course Enrollment as Percent of Grade 9-12 Enrollment
Orange County, 2011/12



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

Percent of Students Scoring Proficient or Better in Math and Science Testing at Course Completion
Orange County, 2008-2012



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

¹ The number of classrooms with Internet access includes all classrooms and other instructional settings at the school (such as a computer lab, library or career center) with an Internet connection. If a classroom has more than one Internet connection, that classroom is still only counted once.

Bio and Engineering Lead Tech-Related Degrees

Description of Indicator

This indicator measures the number of tech-related degrees conferred by Orange County universities that offer tech-related graduate and undergraduate degrees, including California State University, Fullerton, Chapman University and University of California, Irvine.

Why is it Important?

A workforce trained in the STEM disciplines (science, technology, engineering and mathematics) supports Orange County's high-tech sector, nurtures innovation, and contributes to our overall economic wellbeing. High-tech jobs provide good wages for employees and a technically-skilled pool of local graduates for employers, reducing the need to recruit workers from outside the county.

How is Orange County Doing?

In 2010/11, roughly 17% of all undergraduate degrees granted were tech-related, unchanged from the prior year:

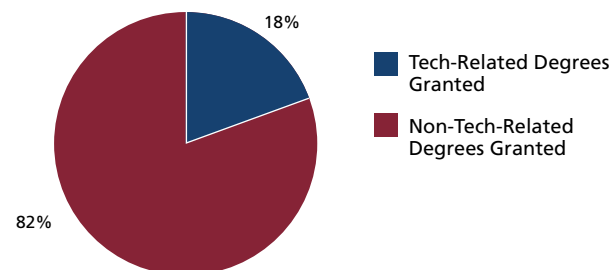
- The number of tech-related undergraduate degrees granted increased 12% over the past five years.
- Since 2006/07, undergraduate degrees granted in physical sciences grew the most (38%), followed by biological sciences (22%) and engineering (15%).
- Undergraduate degrees granted in information and computer sciences fell 23%, while mathematics fell 19%.

Also unchanged from the prior year, 22% of all graduate degrees granted in 2010/11 were tech-related:

- The number of tech-related graduate degrees increased 7% over the past five years.
- Since 2006/07, graduate degrees granted in physical sciences grew the most (165%), followed by mathematics (30%), information and computer sciences (23%) and engineering (20%).
- Biological sciences granted 4% fewer degrees.

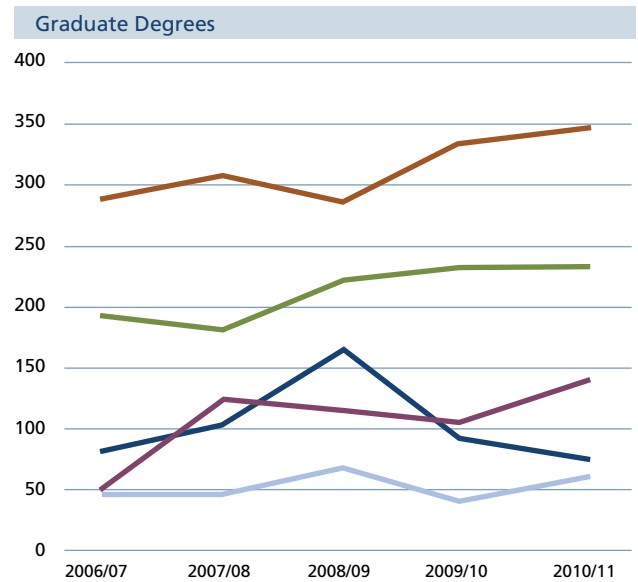
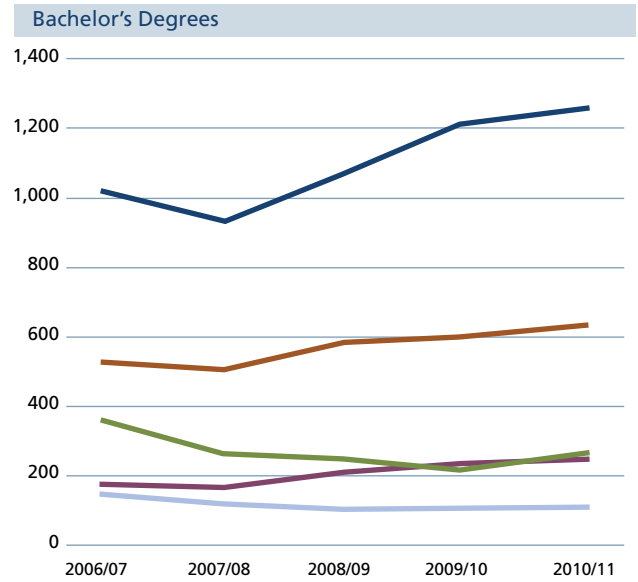
While the number of tech-related degrees granted has increased, so has the overall number of degrees granted by local universities. As a result, the proportion of all degrees granted (both undergraduate and graduate) that were tech-related in 2010/11 has not changed since 2009/10 (18% in 2009/10 and 2010/11).

Proportion of all Degrees Granted that are Tech-Related
Orange County, 2010/11



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

Tech-Related Degrees Conferred at Orange County Universities, 2007-2011

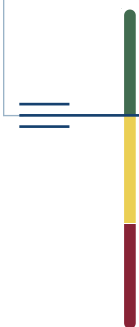


- Biological Sciences
- Engineering
- Information and Computer Sciences
- Physical Sciences
- Mathematics

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



Education



Student **proficiency** in English-language arts and mathematics **continues to grow**, with Orange County consistently outpacing student performance statewide. **Fewer** high school students **dropped out**, and a greater percentage took the courses and testing needed for four-year college eligibility. However, **disparities persist** in academic achievement.

NATIONAL PEERS

Boston, Dallas, Minneapolis, Phoenix

CALIFORNIA PEERS

Sacramento, San Francisco, San Jose

NEIGHBORS

Los Angeles, Riverside/San Bernardino, San Diego

Recession Impacts Job Placement

Description of Indicator

This indicator aggregates and reports career technical education (CTE) data from the Orange County Regional Occupational Programs (ROP) and Orange County community colleges. This data enables the community to assess the ability of CTE providers to supply the local economy with a diverse and appropriately trained labor force.¹

Why is it Important?

Career technical education helps high school students connect their academic learning to real-world training and prepares graduates to enter a career or advanced education. CTE allows adults to acquire specialized job skills, providing opportunities for those reentering the workforce, changing careers, or needing on-the-job skill upgrades.

How is Orange County Doing?

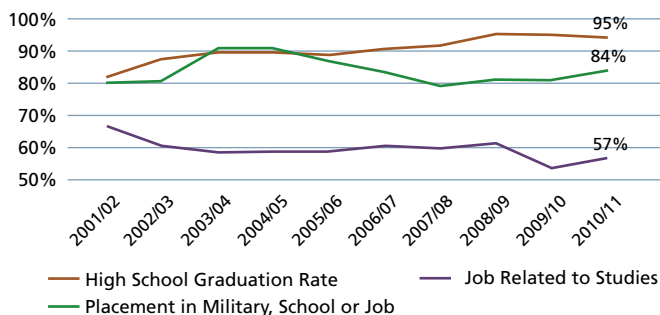
One-fifth of high school students are in ROP:

- 22% of all Orange County high school students participate in ROP, and 95% of ROP students graduate from high school.
- Due in part to new limitations on adult enrollment, adult ROP enrollment continues to fall (from about 26,000 to under 5,000 in the past 10 years), currently making up 11% of overall ROP enrollment.
- Over the past 10 years, ROP enrollment among high school students has grown from about 30,000 to the 2010/11 level of 38,000.
- Community college enrollment fell 1% between 2009/10 and 2010/11.
- Approximately 9% of all adult residents are enrolled in an Orange County community college.

Student performance, including job placement, is mixed:

- In 2010/11, 84% of ROP students were placed within six months of graduating, up from 82% the previous year.
- Of the 84% of ROP students placed, 57% obtained jobs related to their field of study, up from 55% the previous year but just below the 10-year average of 58%.
- For community college CTE students graduating in 2009/10, 79% were placed within a year of completing their course of study, down from 81% in 2008/09 and 83% 2007/08.
- Each of the five most popular community college CTE concentrations posted lower placement rates for 2009/10 graduates.
- In addition to finding a job or joining the military, “placement” for ROP includes pursuing further education, which is not the case for community college CTE graduates. This might contribute to the improving placement rate for ROP students and declining placement rate for community college students during these years of above average unemployment.

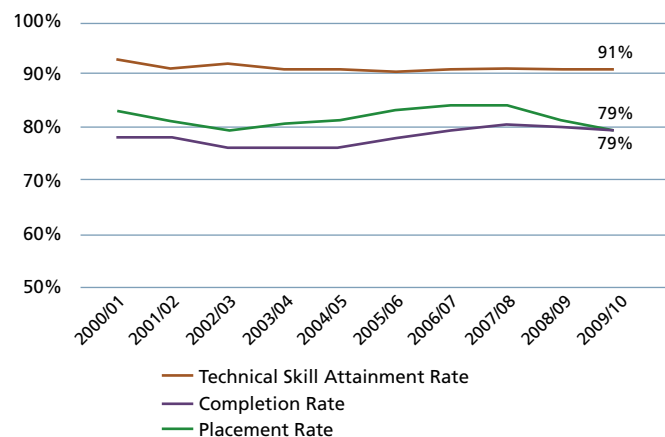
Regional Occupational Programs Student Performance
Orange County, 2002-2011



Note: “Placement” and “Job Related to Studies” include both high school and adult students.

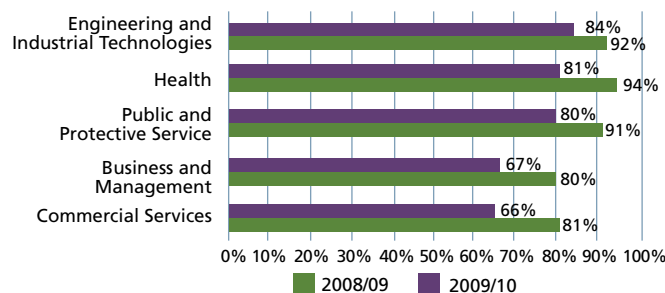
Source: California Department of Education

Community College CTE Student Performance
Orange County, 2001-2010



Note: Data have been updated since previously published. The core performance indicators are defined as follows: “Technical Skill Attainment” is earning a “C” grade or better; “Completion” is receiving a credential, certificate or degree; and “Placement” is finding employment, an apprenticeship, or joining the military.

Placement Rates for Five Most Popular Community College Career Technical Concentrations
Orange County, 2008/09 and 2009/10



Note: Data have been updated since previously presented.

Source: California Community Colleges, Chancellor’s Office, Vocational Education (<https://misweb.cccco.edu/perkins/main.aspx>)

¹ Starting this year, student performance data reflect three-year averages (e.g. “2010/11” is the average of 2008/09, 2009/10 and 2010/11).

Dropout Rate Falls to 9.3%

Description of Indicator

This indicator measures the percentage of public high school students who drop out in total and by race/ethnicity. It also measures the educational attainment of Orange County residents over age 25 compared to the state, nation, and peer regions.

Why is it Important?

A high school diploma or college degree increases the range of career opportunities available, enabling residents to seek out higher paying fields. Research shows that each percentage point increase in the proportion of college-educated people is directly associated with an increase in annual per capita income, benefiting both the individual and the community.¹ Additionally, the education level of residents reflects the quality of the labor pool – an important factor for business attraction, expansion and retention.

How is Orange County Doing?

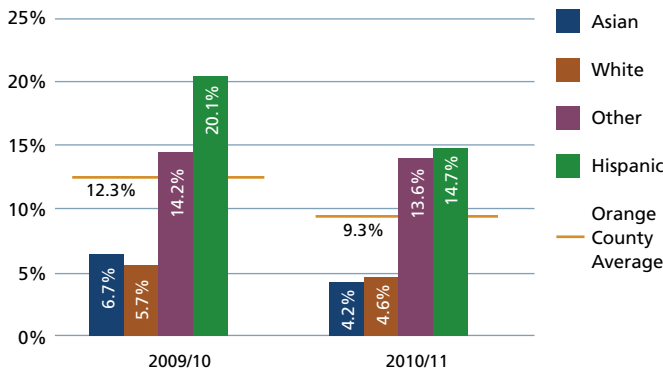
More Orange County students are staying in school:

- 9.3% of the class of 2010/11 dropped out of high school before graduating, compared to 12.3% of the class of 2009/10.²
- These rates are lower than the statewide cohort dropout rates of 14.4% in 2010/11 and 16.6% in 2009/10.
- In 2010/11, Hispanic students had the highest dropout rate at 14.7%, but they showed substantial improvement over last year's dropout rate of 20.1%.
- Compared to enrollment, the dropout rate among Hispanic students is disproportionately high.

High school and college degree rates make slow progress:

- 37% of Orange County residents over age 25 have a Bachelor's degree, placing the county fifth highest among the 11 regions compared.
- This rate is above the state and national averages, and is approximately four percentage points higher than 10 years ago.
- However, in terms of high school graduates, Orange County falls eighth among peers at 84% of residents over age 25 with a high school diploma.
- This rate, which is five percentage points higher than 10 years ago, is above the statewide average but below the national average.

Dropout Rate, by Race/Ethnicity
Orange County, 2009/10 and 2010/11



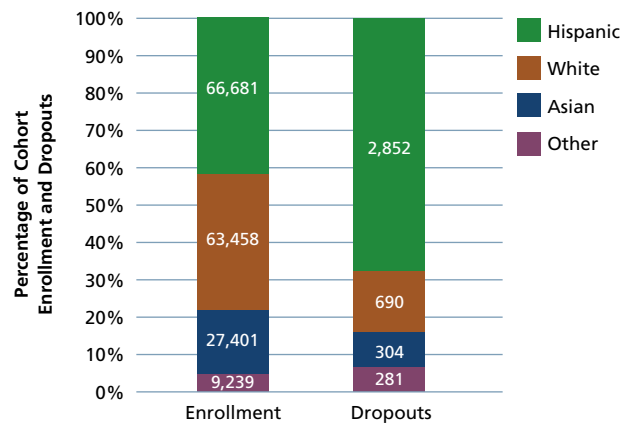
Note: "Asian" includes Asian, Pacific Islander, and Filipino. "Other" includes Native American/Alaskan Native, two or more races, or not reported.

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

¹ CEOs for Cities, Talent Dividend (www.ceosforcities.org/work/city_dividends)

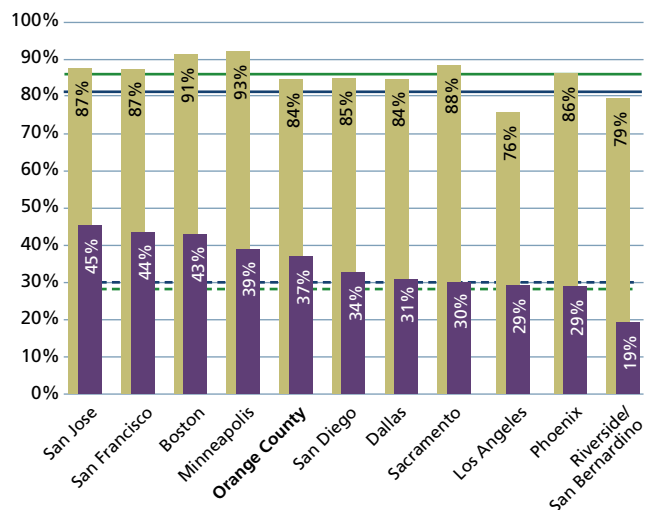
² The California Longitudinal Pupil Achievement Data System (CALPADS), initiated in 2006, allows tracking a class of students through their four years of high school to determine what proportion of that class dropped out over that period. The class of 2009/10 is the first class for which the cohort dropout rate could be calculated.

Enrollment Compared to Dropouts, by Race/Ethnicity
Orange County, Class of 2010/11



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

Percent Over Age 25 Earning a High School Diploma/GED or Bachelor's Degree
Regional Comparison, 2011



High School Graduate or Higher:
 Region (Yellow bar)
 California (81%) (Blue line)
 United States (86%) (Green line)

Bachelor's Degree or Higher:
 Region (Purple bar)
 California (30%) (Blue dashed line)
 United States (29%) (Green dashed line)

Source: U.S. Census Bureau, American Community Survey, 2011 (<http://factfinder2.census.gov>)

Hispanic Students Show Most Improvement

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. It also includes the percentage of high school graduates taking the SAT and the percentage of students scoring 1,500 or better.

Why is it Important?

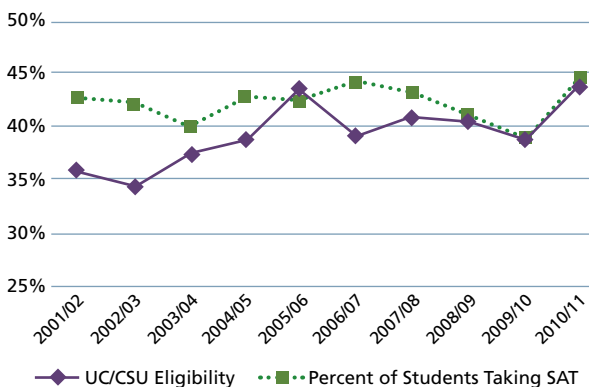
A college education is important for many jobs in Orange County and can lead to higher lifetime earnings. To gain entry to most four-year universities, high school students must complete the necessary coursework and take standardized tests.

How is Orange County Doing?

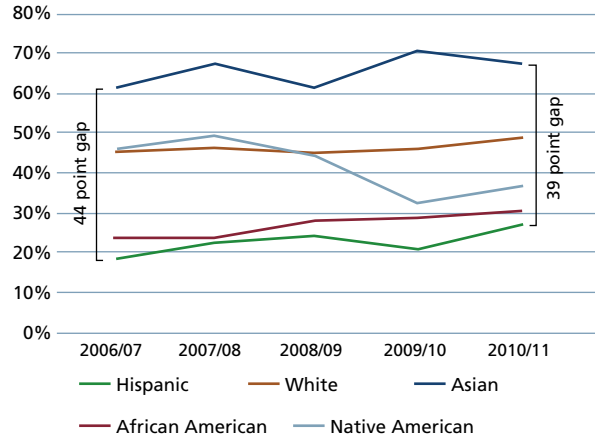
UC/CSU eligibility improved and the readiness gap narrowed:

- In 2010/11, 43% of Orange County students completed the necessary coursework to be UC or CSU eligible, well above the previous 15-year average of 38% and surpassing the state-wide rate of 37%.
- The gap narrowed between Asian and Hispanic students (the race/ethnic groups with the highest and lowest eligibility rates, respectively), from a 44 point gap in 2006/07 to a 39 point gap in 2010/11.
- The gap has narrowed in previous years as well, only to widen again in a subsequent year, yet the overall long-term trend is toward gradual improvement among most races and ethnicities, with Hispanic students showing the fastest rate of increase.

Percent of 12th Grade Students Taking the SAT and Percent of High School Graduates Eligible for UC/CSU
Orange County, 2002-2011

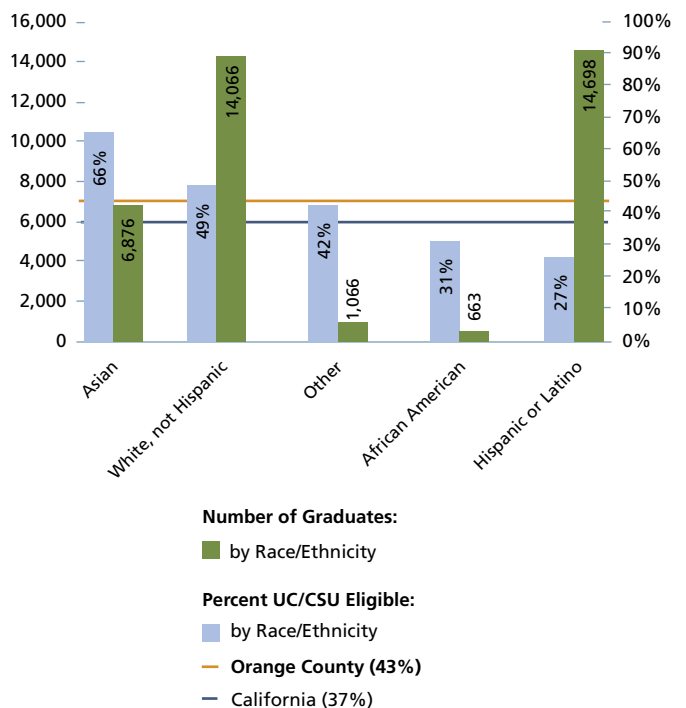


Percent of High School Graduates Eligible for UC/CSU, by Race/Ethnicity
Orange County, 2007-2011



Note: "Asian" includes Asian, Pacific Islander, and Filipino.

Percent of High School Graduates Eligible for UC/CSU Compared to Number of Graduates, by Race/Ethnicity
Orange County, 2010/11



Note: "Asian" includes Asian, Pacific Islander, and Filipino. "Other" includes Native American/Alaskan Native, two or more races, or not reported.

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

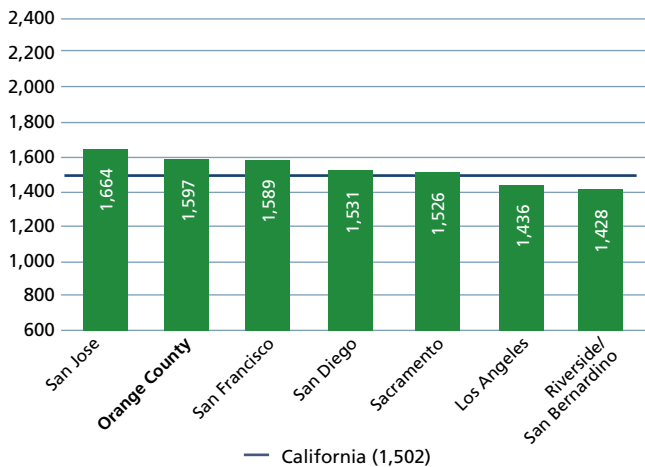
More students took the SAT, but average scores dipped:

- In 2010/11, 44% of 12th graders took the SAT, up from 38% last year.
- 61% of Orange County test-takers scored above 1,500 points, which is lower than the previous year (64%) but well above the California average of 48%.
- Compared to California peer and neighboring metro areas, Orange County's average SAT score of 1,597 trails only the San Jose metro area.

Throughout the county, there are wide disparities in SAT test-taking, scores, and UC/CSU eligibility:

- In Irvine Unified School District, 84% of students scored above 1,500 on the SAT, compared to 31% in Santa Ana Unified School District.
- Asian students are the most likely to be UC/CSU eligible (66%), but comprise only 18% of all high school graduates.
- Hispanic students are the least likely to be UC/CSU eligible (27%), but comprise 39% of all high school graduates.

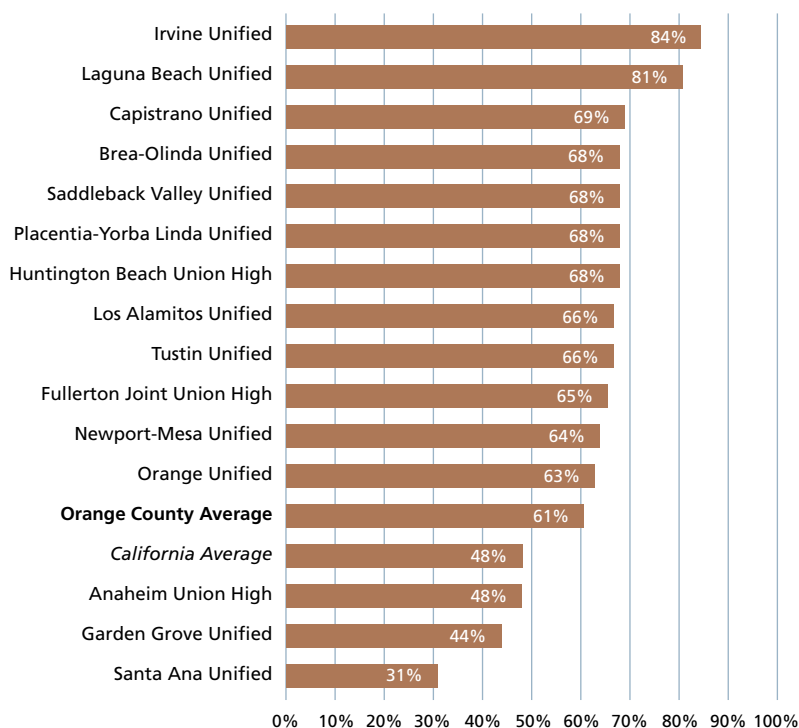
Average SAT Scores
Regional Comparison, 2010/11



Note: The highest score possible is 2,400.

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

Percent of Students Scoring 1,500 or Better on the SAT, by District
Orange County, 2010/11



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

Academic Proficiency Improves; Achievement Gap Narrows

Description of Indicator

This indicator measures academic performance using two metrics: the California Academic Performance Index (API), which summarizes progress toward achievement of academic growth targets for K-12 public schools and districts; and the California Standards Test in English-language arts (ELA) and mathematics, which reports the proportion of students testing proficient or better.

Why is it Important?

Tracking academic performance enables school administrators and the public to evaluate how well Orange County schools are meeting state standards and how well students are performing in core academic disciplines.

How is Orange County Doing?

The majority of Orange County's school district API scores rose in 2012:

- 23 out of 27 school districts achieved API scores above the statewide target of 800, one more than in 2011. In other words, 85% of school districts had scores above 800.
- Santa Ana Unified School District demonstrated the fastest rate of improvement since 2003, increasing their API score by 23%. As a result, the API point gap between Santa Ana Unified (the lowest performing school district) and Irvine Unified (the highest performing school district) narrowed substantially from 249 in 2003 to 170 in 2012.
- 85% of Orange County public schools met their individualized, state-identified API improvement target in 2012, down from 88% in 2011 (districts do not have individualized improvement targets).

Academic proficiency continues to improve at a fairly steady rate:

- In 2012, 66% of Orange County students were proficient or better in ELA and 62% were proficient or better in math, each improving 11 percentage points since 2008.
- Orange County outperformed the state in ELA and math.

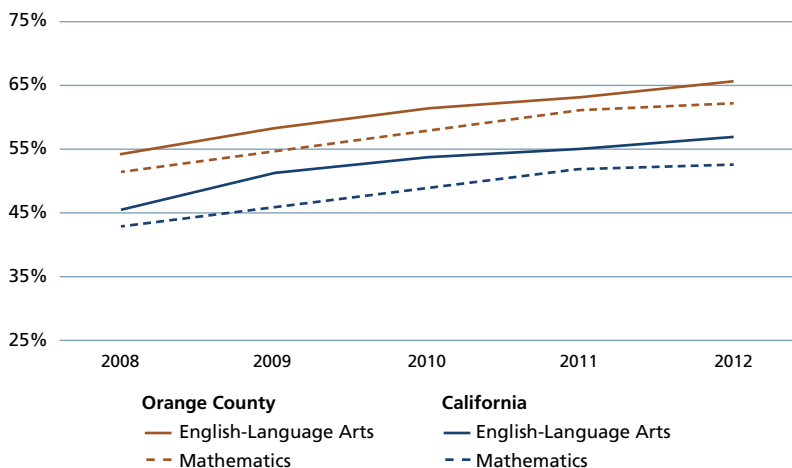
District Academic Performance Index Scores
Orange County, 2012

Elementary Districts	
Fountain Valley	911
Huntington Beach City	902
Cypress	893
Centralia	878
Fullerton	867
Ocean View	866
Westminster	838
Buena Park	822
Magnolia	814
Savanna	809
Anaheim City	776
La Habra City	776
High School Districts	
Huntington Beach Union	842
Fullerton Joint Union	826
Anaheim Union	779
Unified Districts	
Irvine	924
Laguna Beach	922
Los Alamitos	919
Capistrano	879
Brea-Olinda	872
Tustin	868
Placentia-Yorba Linda	867
Saddleback Valley	866
Newport-Mesa	836
Orange	836
Garden Grove	821
Santa Ana	754

■ At or Above State API Target (800) ■ Below State API Target

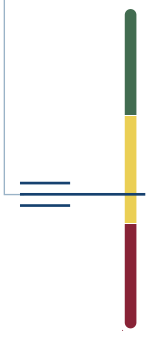
Source: California Department of Education, DataQuest (<http://data1.cde.ca.gov/dataquest/>)

Percent of Students Proficient or Above in English-Language Arts or Mathematics
Orange County and California, 2008-2012



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

Community Health and Prosperity



Nearly 80% of children are adequately immunized and the long-term trend in accidental childhood deaths is downward. Deaths due to heart disease have dropped dramatically, but deaths associated with Alzheimer's disease are steadily increasing. CalFresh enrollment increased 15% on top of large increases the previous two years. Approximately 9% of seniors are living in poverty.

NATIONAL PEERS

Minneapolis, Phoenix, Seattle

CALIFORNIA PEERS

Sacramento, San Francisco, San Jose

NEIGHBORS

Los Angeles, Riverside/San Bernardino, San Diego

Prenatal Care Rates Dip but Remain Relatively High

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, including racial and ethnic detail. Additionally, these rates are compared to peer regions and the state.¹ An analysis of Orange County's live births by race and ethnicity is also included.

Why is it Important?

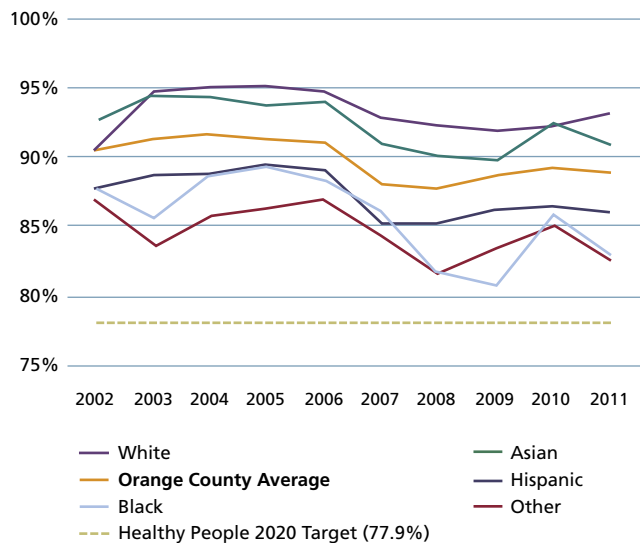
Early prenatal care provides an effective and cost-efficient way to prevent, detect and treat maternal and fetal medical problems. It provides an excellent opportunity for health care providers to offer counseling on healthy living habits that lead to optimal birth outcomes. Late or no prenatal care substantially increases the likelihood that an infant will require admission to a neonatal intensive care unit or require a longer stay in the hospital at substantial cost to the family and the health care system.² Assessing Orange County's total live births by race and ethnicity provides a perspective on the future school age population and overall demographic shifts in the county.

How is Orange County Doing?

Early prenatal care rates dipped slightly in 2011:

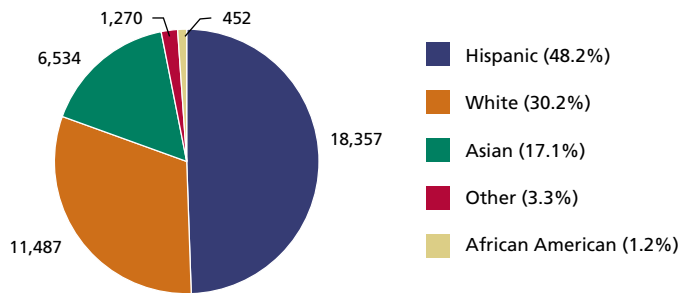
- Orange County's early prenatal care rate fell 0.3 percentage points to 88.7% in 2011.
- After a marked decline in rates between 2006 and 2007, Orange County is having difficulty returning to the highest early prenatal care rate on record of 91.6%, achieved in 2004.
- Based on 2010 data, Orange County's 2010 prenatal care rate of 89.0% exceeded the statewide rate of 81.7% and was the highest early prenatal care rate compared to peer and neighboring regions.¹
- In 2011, levels of early prenatal care improved for white mothers, but declined for all other racial and ethnic groups in Orange County.
- The national Healthy People 2020 target for early prenatal care is 77.9% – a level Orange County has surpassed for many years.
- The majority of births in Orange County in 2011 were to Hispanic mothers (48.2% or 18,357 births), followed by White mothers (30.2% or 11,487 births), and Asian mothers (17.1% or 6,534 births).
- Over the past 10 years, the number of live births in Orange County has dropped 15%, from 44,771 in 2002 to 38,100 in 2011.

Percent of Mothers Receiving Early Prenatal Care, by Race and Ethnicity
Orange County, 2002-2011



Note: The ethnic category "Hispanic" includes any race; the racial categories "White," "Asian," and "African American" are all non-Hispanic. "Other" includes the categories of two or more races, Pacific Islander, American Indian/Native Alaskan, and other or unknown.

Live Births by Race and Ethnicity
Orange County, 2011



Source: County of Orange Health Care Agency

Healthy People 2020

Healthy People 2020 is a health promotion and disease prevention initiative which establishes national objectives to improve the health of all Americans, eliminate disparities, and increase the years and quality of healthy life. For more information, visit: www.healthypeople.gov.

¹ State and regional comparison data for 2011 was not available at time of publication; please see the 2012 Community Indicators report for 2010 comparison data.
² Saied B, Amini, Patrick AA, Catalano and Leon I. Mann, "Effect of Prenatal Care on Obstetrical Outcome," *Journal of Maternal-Fetal and Neonatal Medicine* 1996 5:3, 142-150

Deaths Among Young Children Fall 27% Since 2001

Description of Indicator

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

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 preconception health care, early and ongoing prenatal care, and outreach to parents and caregivers.

How is Orange County Doing?

In 2010, Orange County had the second lowest rate of infant and young child death among California neighbors and peers:

- The number of deaths among infants declined from 165 in 2009 to 147 in 2010, contributing to a 27% drop in the total number of deaths among children under five since 2001.
- The number of deaths among children ages one through four fell slightly, from 36 in 2009 to 34 in 2010.
- In 2010, there was approximately one death for every 316 infants under age one in Orange County, and one in 5,298 among children ages one through four.
- Deaths due to prematurity or low birth weight among infants remained relatively low at eight deaths in 2010 (compared to a 10-year average of 19 deaths annually).
- However, other conditions associated with prematurity increased, such as serious intestinal disease and respiratory distress, which claimed 10 lives.
- After an usually high number of infant and young child deaths due to assault or homicide in 2009 (13), in 2010 two deaths were attributed to this cause.
- Accidents – the leading cause of death for young children – continue to trend downward.

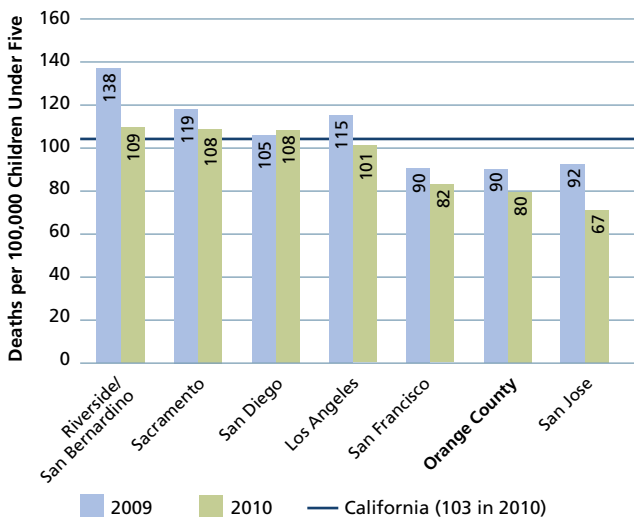
Leading Causes of Death for Children Under Five
Orange County, 2010

Cause of Death	Number of Deaths
Infants (Under Age One)	
Congenital Defects/Chromosomal Abnormalities	41
Maternal Pregnancy Complications Affecting Newborn	19
Prematurity/Low Birth Weight	8
Cord, Placenta or Membranes Complications	5
Respiratory Distress	5
Necrotizing Enterocolitis (serious intestinal disease)	5
All other causes	64
Total	147
Young Children (Ages 1-4)	
Accidents	
Motor Vehicle Accidents	4
Drowning	2
Other	4
Congenital Defects/Chromosomal Abnormalities	8
Cancer	4
Endocrine, Nutritional and Metabolic Diseases	2
All other causes	10
Total	34

Note: Causes with fewer than five deaths for infants and fewer than two deaths for young children are included in "All other causes."

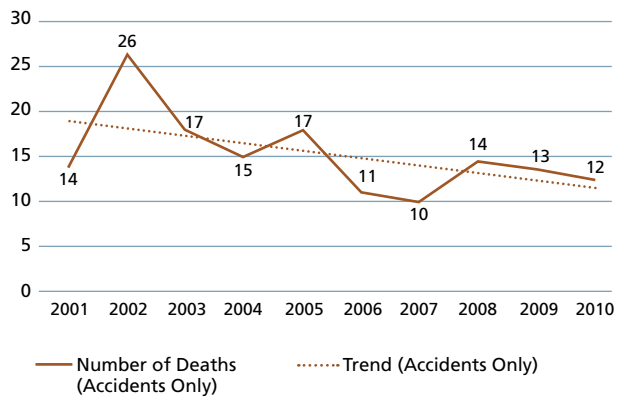
Source: County of Orange Health Care Agency, Family Health Division

Death Rate Due to All Causes for Children Under Five
Regional Comparison, 2009 and 2010



Source: California Department of Public Health, Center for Health Services, Vital Statistics Query System (www.apps.dph.ca.gov/vsq/default.asp)

Accidental Deaths Among Children Under Five
Orange County, 2001-2010



Source: County of Orange Health Care Agency, Family Health Division

Whooping Cough Cases Drop Significantly

Description of Indicator

This indicator measures the percent of children adequately immunized at two years of age and reported cases of vaccine-preventable disease (VPD) among children less than six years of age.

Why is it Important?

Immunization is one of the most important interventions available for preventing serious diseases among infants and children.

How is Orange County Doing?

Immunization rates vary by ethnicity:

- An analysis of kindergarten immunization records from 2012 revealed 78% of Orange County children were adequately immunized at age two, similar to the statewide rate in 2011 (77%).¹
- At 84%, Asian/Pacific Islander children are more likely to be adequately immunized than Hispanic (78%) and White (74%) children.
- 74% of children also received the recommended doses of hepatitis B and varicella immunizations by age two.
- The Healthy People 2020 national target is for 80% of children ages 19 to 35 months to be protected by universally recommended vaccines.²

After a significant outbreak of pertussis (whooping cough) among children less than six years of age in 2010, the incidence of VPD in 2011 was more in line with previous years:

- There were 71 cases of VPD in 2011.
- 54 of the 71 cases were cases of whooping cough (down from 194 cases of whooping cough in 2010).³
- Slightly over half of the 71 cases (38) were children under age one.
- Infants under age one are most at risk of contracting a VPD until they receive full vaccination coverage by age two.
- However, a quarter of the VPD cases were among children ages two to five, suggesting that some children are not receiving recommended vaccinations on schedule, putting younger and more vulnerable siblings at increased risk of contracting a VPD.

Immunization Registry

Roughly 70% of Orange County children ages birth to five were enrolled in the web-based California Immunization Registry as of April 2012 – a total of 168,615 children. This represents a 5.7% increase in the number of children enrolled in the registry since April 2011. The Healthy People 2020 objective is for 95% of children ages 0-5 to be enrolled in an immunization registry. The registry was launched locally in March 2005 and is coordinated by the Orange County Immunization Coalition.

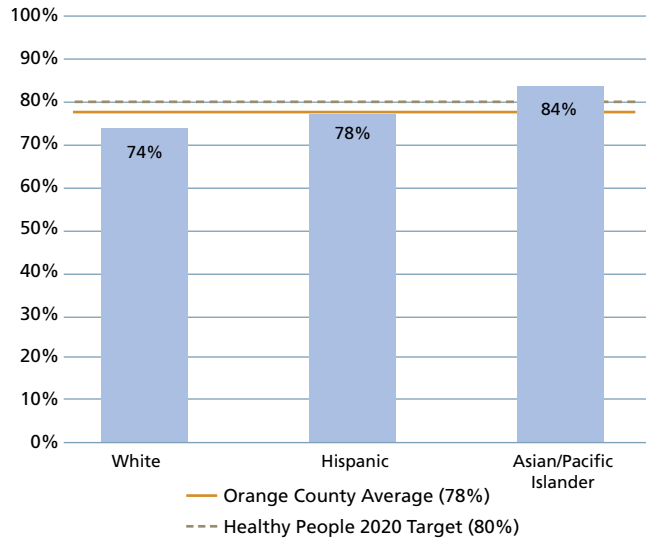
Source: 18th Annual Report on the Conditions of Children in Orange County (www.occhildrenandfamilies.com); U.S. Census Bureau, Census 2010 (<http://factfinder2.census.gov/>)

¹ These data are for Orange County specifically and are therefore not comparable to immunization rates published previously, which were the combined rates of Orange, Riverside, San Bernardino, and San Diego counties (the four-county rate was not calculated for 2012). Since this is a retrospective survey of kindergarten students, the estimates reflect students when they were two years old, which was mostly in 2008, depending on the age the child started kindergarten.

² The Healthy People 2020 target includes recommended doses of Hib, hepatitis B, varicella and pneumococcal disease, as well as DTap, polio, MMR. See page 38 for a description of Healthy People 2020.

³ Pertussis totals include 53 confirmed cases and one suspected case.

Percent of Children Adequately Immunized at Two Years of Age, by Race/Ethnicity
Orange County, 2012



Note: Results for all other racial and ethnic groups were unstable due to small samples.

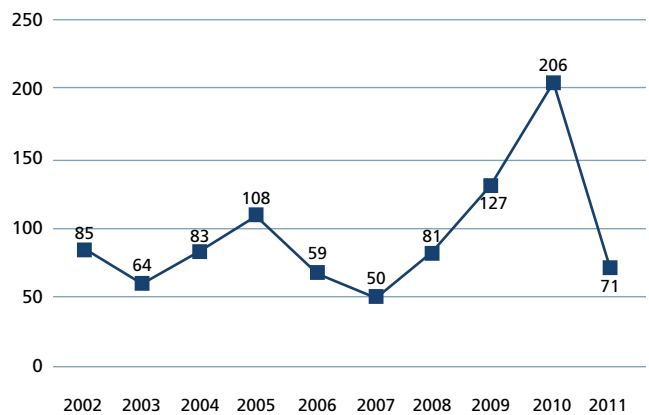
Source: County of Orange Health Care Agency, Immunization Program

Adequately Immunized

To be considered adequately immunized at age two, a child must have the following vaccinations: four doses of diphtheria/tetanus/pertussis (DTaP), three doses of polio, and one dose of measles/mumps/rubella (MMR). Other vaccines recommended by age two include: hemophilus influenza type B (Hib), hepatitis A, hepatitis B, pneumococcal disease, varicella (chicken pox), and annual flu shots.

Source: County of Orange Health Care Agency, Immunization Program

Vaccine-Preventable Disease (VPD) Cases or Hospitalizations Among Children Ages Zero to Five
Orange County, 2002-2011



Note: VPD includes polio, tetanus, diphtheria, pertussis, hepatitis A, hepatitis B, Hib, mumps, measles, and rubella, plus pneumococcal disease (as of 2003), varicella (chicken pox) hospitalization (as of 2004), and serious influenza hospitalization (as of 2008).

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

Nearly 40% of Students Have Weight-Related Health Risk

Description of Indicator

This indicator measures the weight status of Orange County’s children and adults. Children’s weight status is based on the California Department of Education (CDE) Physical Fitness Test, which evaluates the proportion of students in fifth, seventh and ninth grades with an unhealthy body composition (overweight or underweight). The weight status of adults is measured using the California Health Interview Survey and the National Health Interview Survey.

Why is it Important?

Overweight children are more likely to become overweight or obese adults. A sedentary lifestyle and being overweight are among the primary risk factors for many health problems and premature death. Building a commitment to fitness and maintaining a healthy body weight can have positive impacts on physical and mental health.

How is Orange County Doing?

Slightly more students were overweight in 2012:

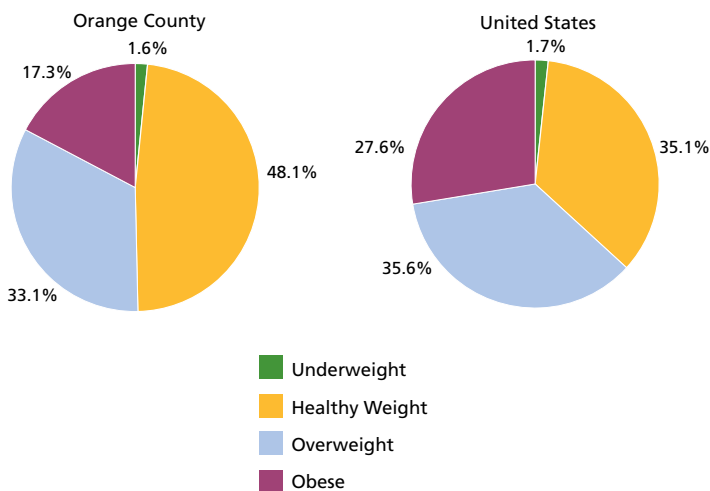
- In 2012, 38.9% of Orange County students in the grades tested had an unhealthy body composition, compared to 44.4% statewide.
- This represents an increase for Orange County, from 37.8% in 2011. The state proportion did not change.
- Of the Orange County students with an unhealthy body composition in 2012, 25.3% were considered to be far outside the healthy range (“Needs Improvement – Health Risk”), while the remaining 13.6% were designated as “Needs Improvement.”
- Stanton and Santa Ana have the highest proportion of overweight youth (51.8% and 46.5%, respectively).
- Newport Beach and Laguna Beach have the lowest proportion (18.3% and 14.3%, respectively).¹

Over half of Orange County adults are overweight:

- In 2009, 33.1% of Orange County adults were considered overweight and 17.3% obese, while nearly half (48.1%) had a healthy body weight.
- In comparison 35.1% of adults nationwide had a healthy body weight.

Weight Status of Adults

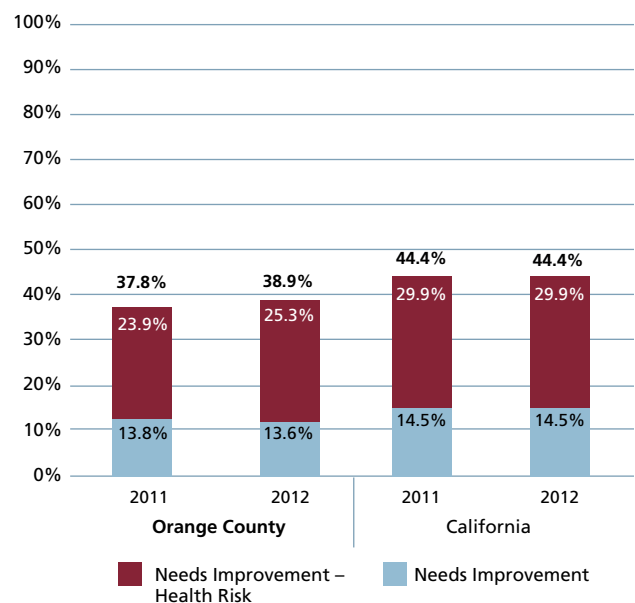
Orange County and United States, 2009



Sources: University of California, Los Angeles, Center for Health Policy Research, California Health Interview Survey (www.chis.ucla.edu); Centers for Disease Control and Prevention, National Health Interview Survey (www.cdc.gov/nchs/products/series/series10.htm)

¹ The 2010 city-level study used different criteria for overweight and obesity than the CDE uses, thus the average Orange County 2010 percentage of overweight youth does not match the percentage published by the CDE and is not comparable to the 2011 and 2012 CDE data presented.

Percent of Students with Unhealthy Body Composition
Orange County and California, 2011-2012



Note: Due to changes to the criteria, these data are not comparable to CDE Fitness Test data prior to 2011.

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

Percent of Students who are Overweight or Obese
Selected Orange County Cities, 2010

Stanton	51.8%	Brea	28.0%
Santa Ana	46.5%	Cypress	27.6%
Anaheim	43.5%	Laguna Hills	27.2%
Orange	43.2%	Lake Forest	26.9%
Buena Park	41.8%	Huntington Beach	26.4%
California	38.0%	Mission Viejo	25.1%
Garden Grove	38.0%	Rancho Santa Margarita	22.9%
La Habra	36.9%	Irvine	21.7%
Tustin	35.9%	San Clemente	21.1%
San Juan Capistrano	33.7%	Dana Point	20.8%
Orange County¹	33.3%	Aliso Viejo	20.8%
Westminster	33.0%	Laguna Niguel	19.4%
Fountain Valley	31.4%	Newport Beach	18.3%
Fullerton	30.9%	Laguna Beach	14.3%
Seal Beach	28.8%		

Source: UCLA Center for Health Policy Research and the California Center for Public Health Advocacy based on data from the California Department of Education Physical Fitness Test (www.publichealthadvocacy.org)

More People Accessing Food Assistance

Description of Indicator

This indicator measures Orange County families' progress toward self-sufficiency and economic stability by tracking enrollment in core public assistance programs and the proportion of children living in low-income families.

Why is it Important?

The challenges associated with poverty such as stress, strained family relationships, poor health, substandard housing, lower educational attainment, limited employment skills, unaffordable child care, and transportation difficulties can make it hard for low-income families to obtain and maintain employment. Economic stability can alleviate these challenges, and as a result, have lasting and measurable benefits for both parents and children.

How is Orange County Doing?

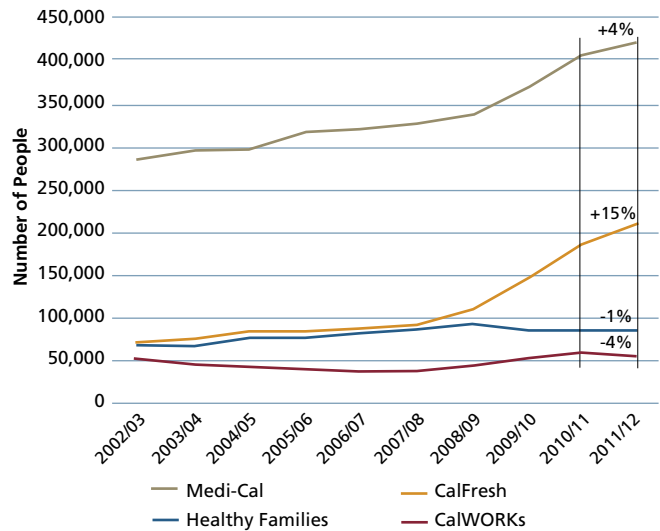
Food subsidies grow while income assistance falls:

- CalFresh (formerly Food Stamps) enrollment increased 15% in 2011/12, on top of a 24% increase in 2010/11 and a 37% increase in 2009/10.
- A monthly average of 213,919 residents received CalFresh in 2011/12, equivalent to 7.0% of the county's total population.¹
- In addition to growing need, increasing CalFresh enrollment reflects expanded eligibility and greater efforts to enroll income-eligible residents.
- In terms of health insurance, Medi-Cal enrollment grew 4%, while Healthy Families enrollment fell 1%.
- Enrollment in CalWORKs had been growing steadily since 2007/08, but in 2011/12, CalWORKs enrollment fell 4%. Modest economic improvement may be contributing to this decline, as well as adults timing out of the program after four years.

The proportion of children living in low-income families continues to grow:

- Over 46% of students were eligible for free or reduced-price school meals in 2011/12 – an increase of 20% over the past 10 years.
- A child is eligible if his or her family's income is below 185% of the Federal Poverty Guidelines (e.g. \$42,643 for a family of four in 2012).²
- In Orange County, wide disparities persist with the highest rate of eligibility in Anaheim City School District (86%) and the lowest rate of eligibility in Laguna Beach Unified School District (10%).

Major Public Assistance Program Enrollment
Orange County, 2003-2012



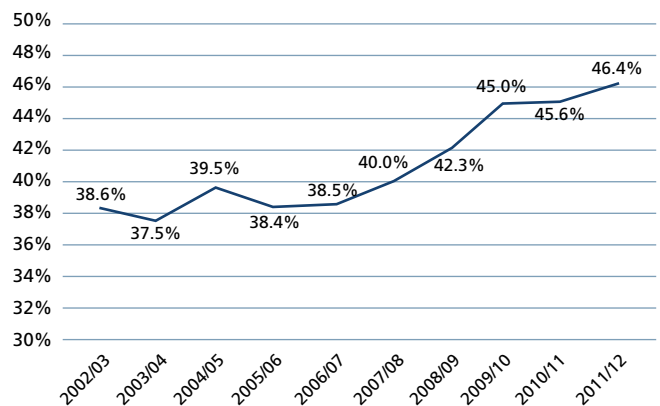
Sources: County of Orange Social Services Agency; State of California, Managed Risk Medical Insurance Board, Healthy Families (www.mrmib.ca.gov/MRMIB/HFPRReportsJune12.shtml)

Program Descriptions

Most programs require income and asset limitations, as well as citizenship or permanent legal resident status. Other eligibility factors may apply such as county or state residency, age, or time in the program (time-limits).

- **Medi-Cal** is a health care program for certain low-income populations.
- **CalFresh** (formerly Food Stamps) provides low-income households with assistance for the purchase of food. Due to a federal waiver in 2010, there are no longer asset limitations in this program.
- **Healthy Families** is a health insurance program for children under 19 years who do not qualify for free (zero share-of-cost) Medi-Cal.
- **CalWORKs** provides cash benefits and employment services for low-income families.

Students Eligible for Free or Reduced-Price School Meals
Orange County, 2003-2012



Source: California Department of Education

¹ Population figures from the California Department of Finance, Table E-4 (www.dof.ca.gov/research/demographic/reports/view.php)
² Health and Human Services Federal Poverty Guidelines 2012 (<http://aspe.hhs.gov/poverty/12poverty.shtml>)

Many School Age Students Face Housing Insecurity

Description of Indicator

This indicator measures Orange County family housing stability by tracking the number of children that are homeless or living in insecure housing arrangements, as well as the availability of rental assistance.¹

Why is it Important?

High housing costs force many families into living conditions they would not choose otherwise. Living doubled- or tripled-up with another family due to economic constraints can place stress on personal relationships, housing stock, public services, and infrastructure. When shared housing is not an option – or if other factors arise such as foreclosure, financial loss, or domestic violence – the result can be homelessness. Housing insecurity among young children is associated with food insecurity and a greater likelihood of poor health and developmental delays.²

How is Orange County Doing?

Housing insecurity grew for school age children:

- In 2011/12, the number of PreK-12 students who were identified as homeless or living in unstable housing arrangements rose by 3%, bringing the total to 28,626.
- Most of these students (26,115) live in families that are doubled- or tripled-up with another family.
- Since 2007/08, the number of students living in motels rose 68%, while the number students living in shelters rose 169% and the number of unsheltered students rose 158%.
- At 5.7% of total enrollment, Orange County has proportionately more students with insecure housing than the statewide average and all California peers compared except Riverside/San Bernardino.

Housing Authorities provide rental assistance to low-income residents but demand far outpaces supply in Orange County:

- As of October 2012, Orange County’s four Housing Authorities were assisting 22,229 households with rent.
- When the Orange County Housing Authority (OCHA) opened their waiting list to new applicants for a two-week period in February 2012, the result was 27,935 new applicants who live or work in one of OCHA’s 31 participating cities or unincorporated areas.
- The OCHA also received more than 10,000 applications from residents that are served by Orange County’s three other Housing Authorities: Anaheim, Garden Grove, and Santa Ana.
- Among the applicants residing or working in OCHA’s service area, 8% were veterans, 75% were elderly, disabled, or a working family, and the remaining 17% were non-working families or singles.
- The majority of residents currently receiving rental assistance countywide are elderly (42%), followed by families with children (32%), the disabled (14%), and singles or couples (11%).

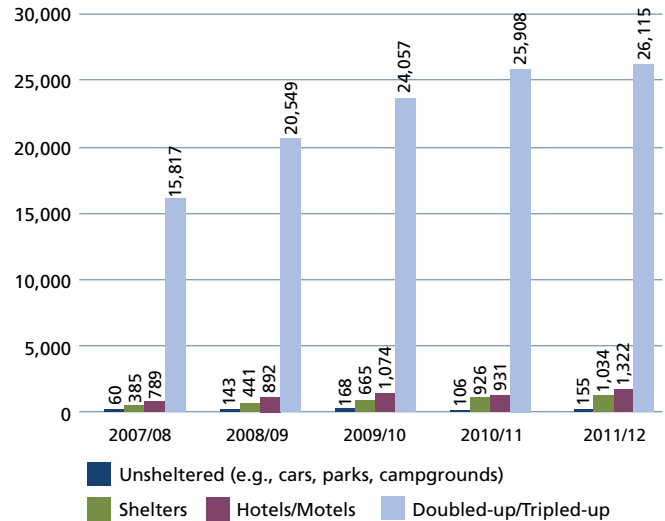
2-1-1 Orange County

In 2011/12, approximately 10% of callers to 2-1-1 Orange County inquired about rental assistance. When looking at all housing-related issues (such as shelters, rental assistance, mortgage payment assistance, and motel vouchers), as many as 28% of callers, or nearly 25,000 people, inquired about these topics.

¹ Federal law requires public school districts to report the number of students living in shelters or unsheltered in cars, parks or campgrounds, as well as students living in motels or temporarily with another family due to economic hardship. Homeless student data is subject to revision due to the ability of districts to make changes to reported counts.

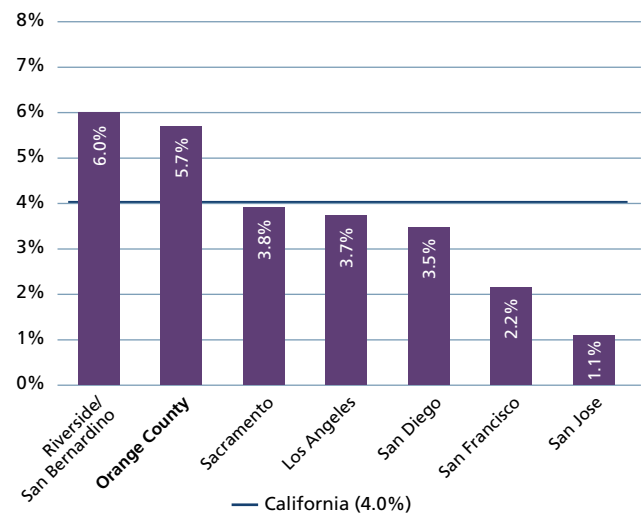
² Children’s HealthWatch (www.childrenshealthwatch.org/page/policyactionbriefs)

Homeless and Housing Insecure School Age Students, by Primary Nighttime Residence
Orange County, 2008-2012



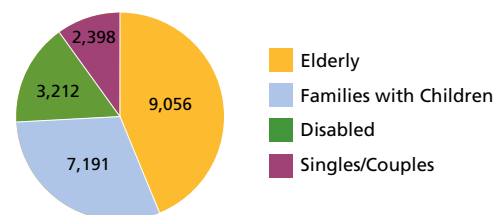
Source: California Department of Education, November 2012

Homeless and Housing Insecure School Age Students, by Percentage of Total Enrollment
Regional Comparison, 2011/12



Source: California Department of Education, November 2012

Households Receiving Rental Assistance from the Anaheim, Garden Grove, Santa Ana, and Orange County Housing Authorities, 2012



Source: Housing and Urban Development (<https://pic.bud.gov/pic/RCRPublic/rcrmain.asp>)

30% of Young Adults are Uninsured

Description of Indicator

This indicator measures the proportion of Orange County residents that are uninsured, including details about coverage by age, race and ethnicity, educational attainment and income.¹

Why is it Important?

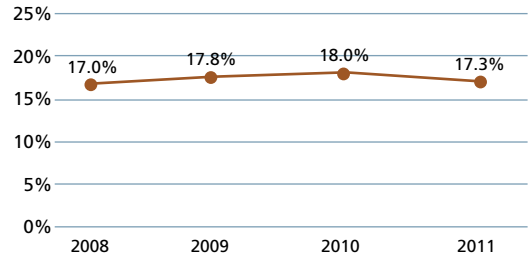
Access to quality health care is heavily influenced by health insurance coverage. Due to the high cost of health care, individuals who have health insurance are more likely to seek routine medical care and to take advantage of preventive health screening services than those without such coverage. This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

How is Orange County Doing?

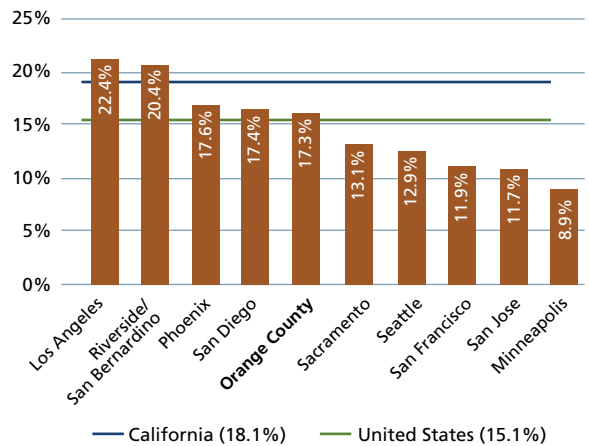
Estimates indicate approximately one in six Orange County residents are uninsured, a proportion that has not changed significantly over the past four years:

- In 2011, 17.3% of Orange County residents were uninsured.
- This proportion is higher than the United States average (15.1%), lower than the California average (18.1%), and in the mid-range compared to peers.
- Young adults were the age group most likely to be uninsured (30%).
- Hispanic residents were the race or ethnic group most likely to be uninsured (30%).
- When broken out by household income, those with incomes in the lower-middle range (\$25,000-\$49,000) were the most likely to be uninsured (28%).
- Fully 40% of those with less than a high school diploma were uninsured.

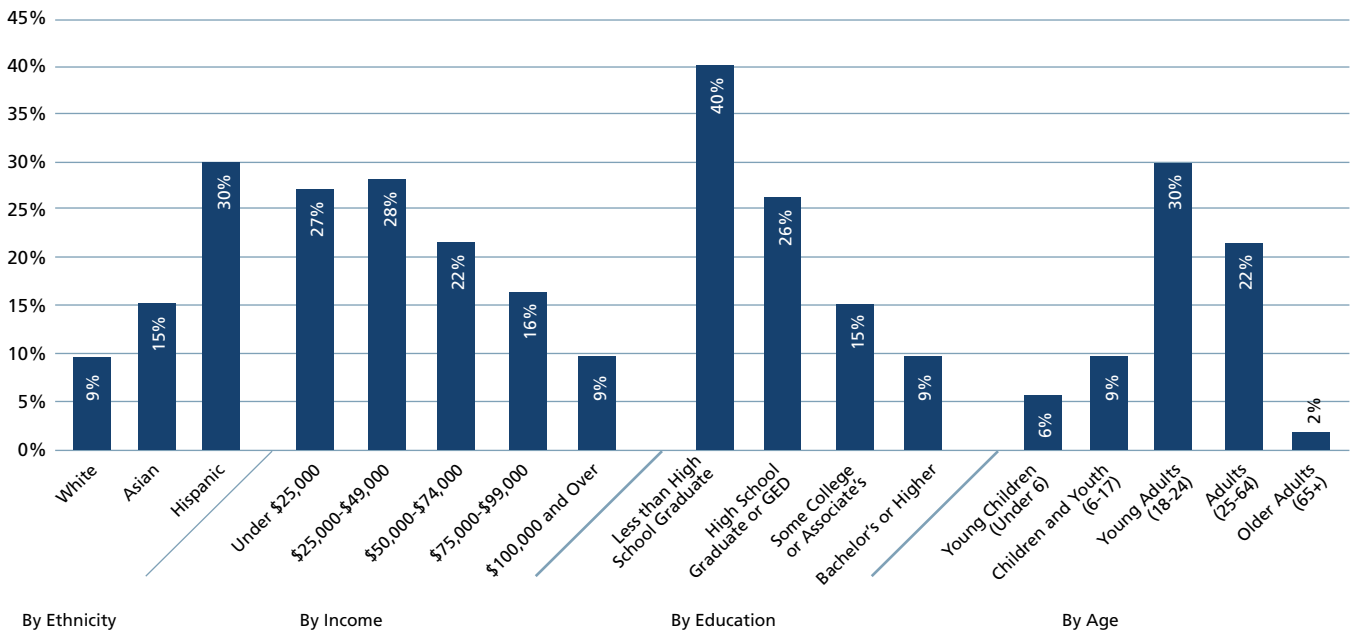
Uninsured (All Ages)
Orange County, 2008-2011



Uninsured (All Ages)
Regional Comparison, 2011



Uninsured by Race/Ethnicity, Income, Education and Age
Orange County, 2011



Note: Asian includes Native Hawaiian/Pacific Islander. White is non-hispanic. Latino is of any race. Educational attainment data is for the population age 25 and over.

Source: U.S. Census Bureau, American Community Survey, 1-Year Estimates (<http://factfinder2.census.gov>)

¹Data are from the U.S. Census Bureau and not comparable to data from the California Health Interview Survey presented previously in this indicator.

Poverty Rate for Seniors Remains Historically High

Description of Indicator

This indicator measures the economic, safety, and health status of Orange County older adults (65 years of age and over).¹

Why is it Important?

Between 2007 and 2011, Orange County's senior population grew 10%. This trend is expected to increase, with Orange County's older population projected to grow by 94% between 2010 and 2030, and to experience a significant shift in racial and ethnic composition.² These trends will place greater and changing demands on health, transportation and support services for this population.

How is Orange County Doing?

Poverty among Orange County's seniors was largely unchanged:

- In 2011, 8.8% of older adults lived in poverty, compared to 8.7% in 2010.
- This proportion is relatively high considering that Orange County's senior poverty rate in the prior 10 years averaged 6.9%.
- Orange County's senior poverty rate is lower than the state and nation, but it has increased at a faster rate than both.
- The 2011 median household income of Orange County's older adults is \$46,194, compared to the county median of \$72,293.
- Homeownership among seniors is higher than the non-senior adult population (77% vs. 54%), and median monthly mortgage costs for older adults are nearly \$1,000 less than for the population overall.

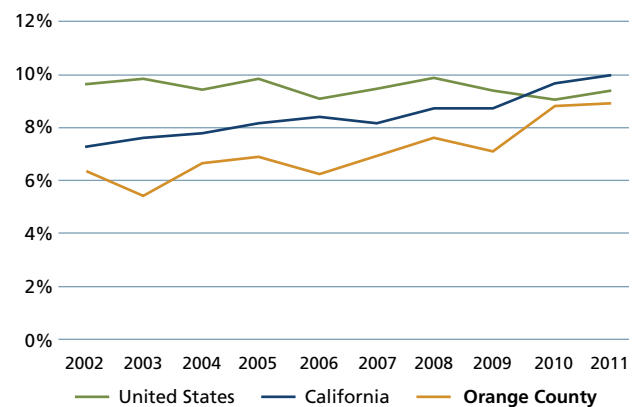
Most older adults are healthy:

- According to the 2009 California Health Interview Survey, as many as 70% of older adults rate their health as "excellent," "very good" or "good," while the remaining 30% rate their health as "fair" or "poor."
- While deaths due to heart disease and cancer are declining, the death rate for Alzheimer's disease rose 36% between 2006 and 2010.³
- Medicare and Medicaid payments for people with Alzheimer's and other dementias range from three to nine times higher than patients without these conditions.⁴
- The older adult caseload for the County of Orange Social Services Agency's (SSA) In-Home Supportive Services program increased 24% since 2008, totaling 13,319 seniors served as of July 2012.⁵
- Similarly, Medi-Cal enrollment by older adults increased 23% since 2008, with an average of 53,559 seniors enrolled in Medi-Cal in any given month in 2011/12.⁵
- At the same time, the number of seniors receiving CalFresh (formerly Food Stamps) rose to 4,569, an increase of 259% since 2008.
- Of the support services tracked, only congregate and in-home meals served to older adults by the County of Orange Office on Aging decreased in 2011/12, falling 11% in one year, to 1.64 million meals. Budget reductions are the cause of the decrease.

Elder abuse reports increased:

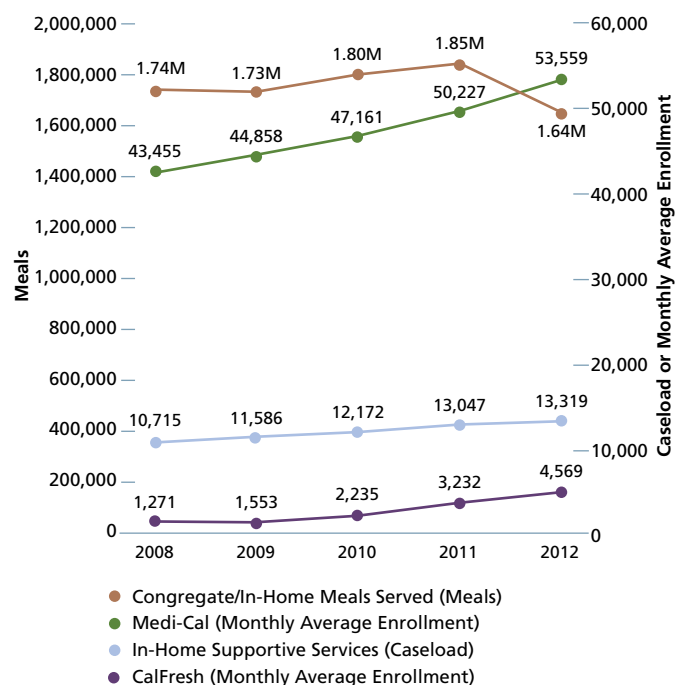
- The average monthly number of elder abuse cases handled by SSA rose to 453 cases in 2011/12, an increase of 18% since 2008.
- Elder abuse includes self-neglect – the most common form of abuse – as well as abuse by others including neglect, and financial, physical, or emotional abuse.

Percent Age 65 and Over in Poverty
Orange County, California and United States, 2002-2011



Source: U.S. Census Bureau, American Community Survey (<http://factfinder2.census.gov>)

Older Adult Support Services
Orange County, 2008-2012



Note: Data for In-Home Supportive Services is the caseload as of June of a given year (except 2012, when it is as of July); Congregate/In-Home Meals served, Medi-Cal enrollment and CalFresh enrollment are by fiscal year (2011 refers to 2010/11).

Sources: County of Orange Social Services Agency (IHSS, Medi-Cal, CalFresh); Orange County Community Services/Office on Aging (C/HMS)

¹Data are from the U.S. Census Bureau, 2011 American Community Survey unless otherwise noted.

²California Department of Finance

³California Department of Public Health (age-adjusted death rates)

⁴Centers for Disease Control and Prevention (www.cdc.gov/aging/aginginfo/alzheimers.htm)

⁵In-Home Supportive Services for seniors includes domestic assistance, personal and paramedical care, and protective supervision to prevent self-harm.

Gallup-Healthways Index Tracks Residents' Wellbeing

Description of Indicator

This indicator measures residents' sense of wellbeing about their lives and overall emotional health based on data derived from the Gallup-Healthways Well-Being Index.

Why is it Important?

Life satisfaction and emotional health have profound impacts on individuals as well as the home, workplace, and community. Public and private entities can use this data to identify problems and develop strategies to overcome these difficulties, helping the community thrive.

How is Orange County Doing?

Life satisfaction among residents remained relatively constant:

- At 57.3% in 2011, slightly fewer Orange County residents were "thriving" than a year ago (57.9%), but since 2008, life evaluation has improved nearly five percentage points.
- Also in 2011, 40.7% were "struggling" and 2.0% were "suffering."
- Orange County's overall Life Evaluation Index score was 55.3 in 2011, up from 54.9 in 2010.
- In 2010, Orange County's Life Evaluation Index score was higher than the state (50.0) and nation (50.3).
- Similarly, Orange County's 2010 Emotional Health Index score of 81.2 was higher than the state (78.9) and nation (79.4).
- In 2011, Orange County's Emotional Health Index score fell slightly, dropping from 81.2 in 2010 to 80.3 in 2011.
- A strong majority of residents consider themselves treated with respect (94%) and happy (88%).
- 39% indicated they are currently living with stress, and 12.5% reported they were diagnosed with clinical depression at some point in their lives.

Gallup-Healthways Well-Being Index

The Well-Being Index measures health through six sub-indices including Emotional Health and Life Evaluation:

Emotional Health Index

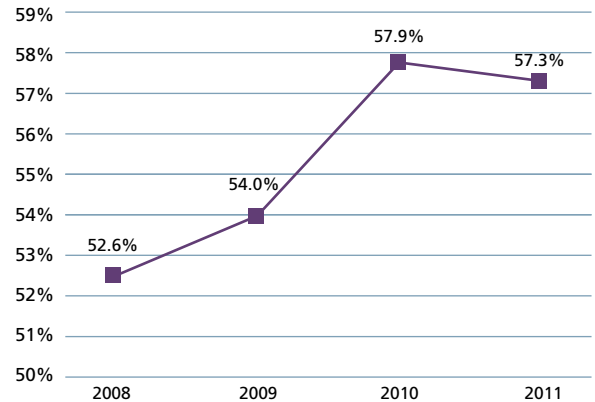
Measures daily experiences including smiling or laughter, being treated with respect, enjoyment, happiness, worry, sadness, anger, stress, learning or doing something interesting, and depression.

Life Evaluation Index

Measures how residents evaluate their current status and outlook for the future on a scale of zero to 10. The results are then categorized with the highest rankings considered "thriving," the middle rankings considered "struggling," and the lowest rankings considered "suffering."

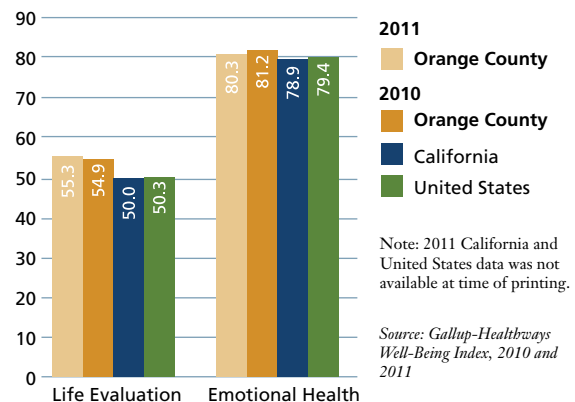
For more information, visit: www.well-beingindex.com.

Life Evaluation Index: Percent "Thriving"
Orange County, 2008-2011

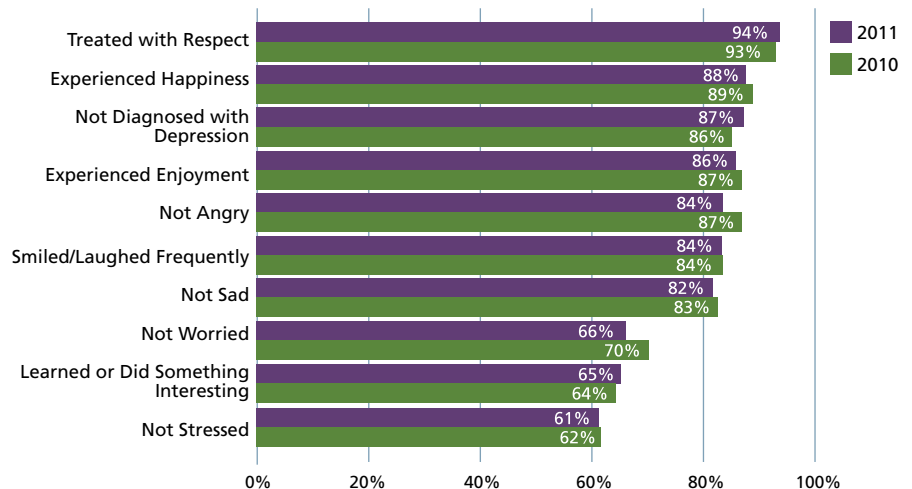


Source: Gallup-Healthways Well-Being Index, 2008-2011

Life Evaluation and Emotional Health Composite Index Scores
Orange County, California and United States, 2010 and 2011



Emotional Health Index
Orange County, 2010 and 2011



Source: Gallup-Healthways Well-Being Index, 2010 and 2011

Heart Disease and Cancer Death Rates Continue to Fall

Description of Indicator

This indicator reports mortality rates (age-adjusted deaths per 100,000 people) and progress toward the Healthy People 2020 objectives for 18 commonly measured causes of death, with detailed trend analysis for six selected leading causes.¹

Why is it Important?

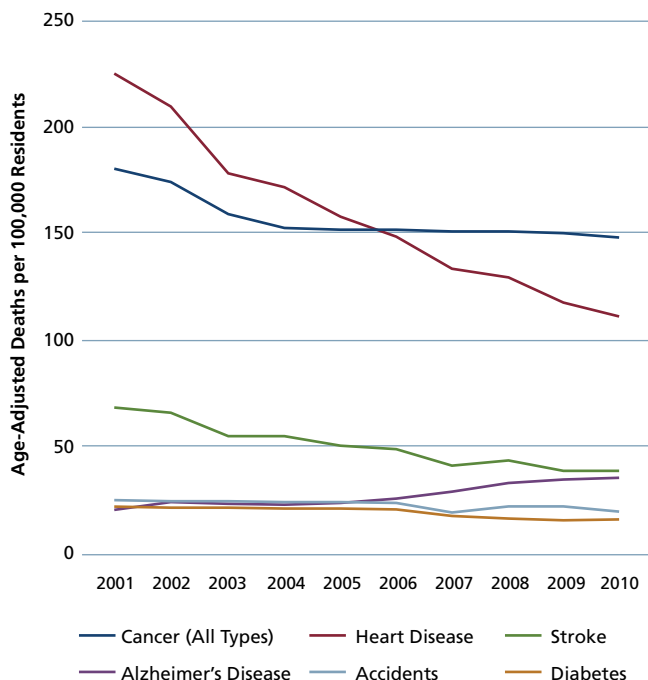
Viewing the county in relation to statewide averages and national health objectives identifies public health issues that are comparatively more or less pronounced in Orange County. This information helps the development and prioritization of public health initiatives.

How is Orange County Doing?

Death rates for cancer and heart disease continue to fall:

- Cancer deaths declined 19% since 2001 and heart disease deaths declined 48% during the same period.
- While deaths due to stroke rose slightly in 2010, the long-term trend is strongly downward, falling 43% since 2001.
- The diabetes death rate did not change in 2010, although the long-term trend is gradually downward.
- Deaths due to accidents fell in 2010 but variable death rates over the past 10 years do not point to a discernable trend.
- Alzheimer's disease deaths continued to rise, maintaining Orange County's above-average rate in the state.
- Orange County is also above the statewide average for deaths due to the flu or pneumonia.
- For the remaining 16 commonly measured causes of death, Orange County has lower death rates than the statewide average.
- Orange County has yet to achieve the Healthy People 2020 objectives for accidents, chronic liver disease/cirrhosis, stroke and heart disease.

Age-Adjusted Death Rates for Selected Leading Causes of Death
Orange County, 2001-2010



Source: California Department of Public Health, County Health Status Profiles (www.cdph.ca.gov/programs/ohir/Pages/CHSP.aspx)

Orange County Age-Adjusted Death Rate, Ranking, and Comparison to the California Average, 2010

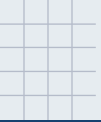
Rank Among California Counties	Cause of Death	Death Rate per 100,000
4	Accidents	21.6
5	Motor Vehicle Crashes ✓	4.9
6	Firearms Injury ✓	4.5
8	Suicide ✓	8.4
13	Chronic Lower Respiratory Disease *	32.8
14	Chronic Liver Disease and Cirrhosis	9.2
14	Homicide ✓	2.2
17	Drug-Induced ✓	9.8
18	Colon Cancer ✓	12.8
18	Lung Cancer ✓	34.5
19	Diabetes ✓	14.2
21	All Cancers ✓	146.1
26	Stroke	37.2
29	Breast Cancer ✓	20.6
31	Prostate Cancer ✓	21.0
33	Heart Disease	113.3
44	Influenza or Pneumonia *	18.5
46	Alzheimer's Disease *	32.4

Note: Ordered by Orange County's rank among California counties (one is best, 58 is worst).

- Better than California Average
- Worse than California Average
- ✓ Healthy People 2020 Target Achieved
- * No matching Healthy People 2020 target

Source: California Department of Public Health, County Health Status Profiles (www.cdph.ca.gov/programs/ohir/Pages/CHSP.aspx)

¹ See page 38 for a description of Healthy People 2020. Data reflect three-year averages (with the exception of Alzheimer's Disease deaths from 2001 to 2004, which are sourced from the Vital Statistics Query System and are single-year age-adjusted rates). For example, "2010" is an average of 2008, 2009, and 2010 data. Counties with varying age compositions can have widely disparate death rates since the risk of dying is largely a function of age. Age-adjusted rates control for this variability and enable county comparisons and the ability to track progress toward Healthy People 2020 objectives, which are also based on age-adjusted rates.



Public Safety

Orange County's **low crime** rate held steady, and **gang-related crime fell** for the second consecutive year. **Child abuse** reports also **declined** for a fourth year, yet Orange County is high compared to peers for confirmed abuse reports. Nearly one-third of all **traffic fatalities** and severe injuries were **alcohol-related**.

NATIONAL PEERS

Phoenix, Seattle

CALIFORNIA PEERS

Sacramento, San Francisco, San Jose

NEIGHBORS

Los Angeles, Riverside/San Bernardino, San Diego

Child Abuse Reports Continue to Fall

Description of Indicator

This indicator tracks confirmed child abuse and neglect reports (substantiated referrals) and the number of children entering foster care. Domestic violence is tracked by measuring calls for assistance.

Why is it Important?

Foster care placement is often the final act to protect children from abuse and neglect after repeated attempts to stabilize their families have failed. Domestic violence threatens the physical and emotional wellbeing of children and women in particular, and can have lasting negative impacts. It can also lead to homelessness when the abused flees a dangerous environment.

How is Orange County Doing?

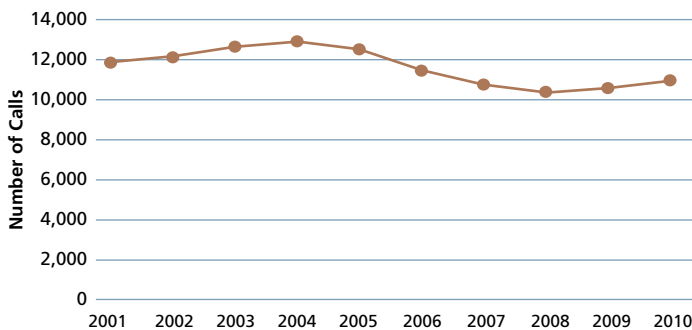
Child abuse and neglect reports continue to decline:

- In 2011, Orange County had roughly the same level of child abuse and neglect referrals per 1,000 children (ages 0-17) as the statewide average, and a 7% decrease over 2010 levels.
- The number of children entering foster care fell 10% between 2010 and 2011.
- While Orange County is on the high end among regions compared for confirmed child abuse and neglect reports, it has the lowest rate of children entering foster care (1.7 per 1,000 children).
- When possible, the Orange County Social Services Agency keeps families intact while providing stabilizing services. This may account for the fact that only 18% of substantiated referrals in Orange County result in foster care placement, compared to between 31% and 48% in peer regions.

Domestic violence-related calls for assistance rose for the second year:

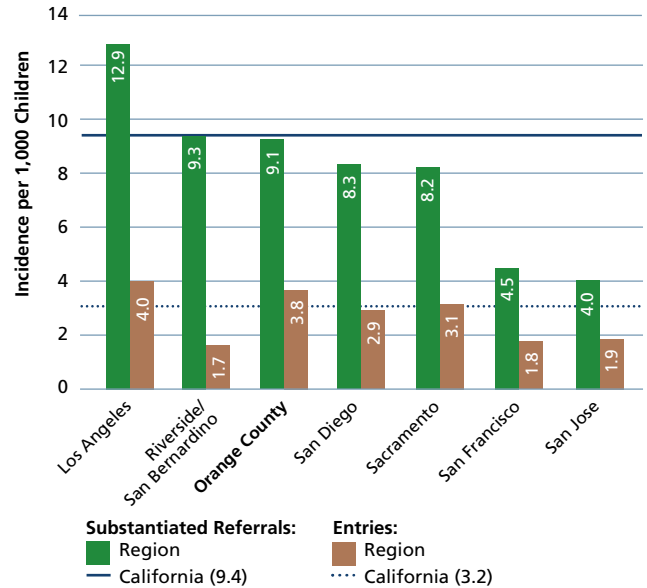
- In 2010, there were 11,003 domestic violence-related calls for assistance, compared to 10,377 in 2009.
- Despite the increase, the 10-year trend for calls for assistance remains downward, falling 13% since 2001.

Domestic Violence-Related Calls for Assistance Orange County, 2001-2010



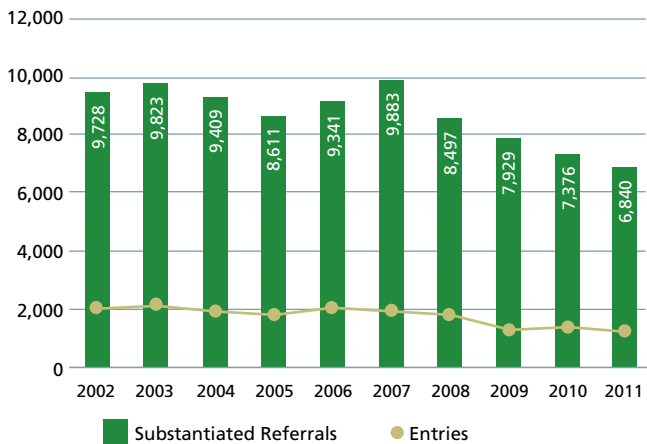
Source: California Department of Justice, Criminal Justice Statistics Center

Substantial Referrals and Entries to Foster Care Regional Comparison, 2011



Source: University of California Berkeley, Center for Social Services Research, Child Welfare Research Center (http://cssr.berkeley.edu/uch_childwelfare/default.aspx)

Substantial Referrals and Entries to Foster Care Orange County, 2002-2011



Source: University of California Berkeley, Center for Social Services Research, Child Welfare Research Center (http://cssr.berkeley.edu/uch_childwelfare/default.aspx)

2-1-1 Orange County

In 2011/12, 204 calls made to the system were related to a child abuse concern, down from 263 in 2010/11. Also in 2011/12, there were 232 calls related to child safety, 52 calls related to adoption and foster care, and 22 calls related to emancipation services for teens aging out of foster care. Five calls pertained to safely surrendering a baby. In total, these calls comprise less than one percent of all calls made to 2-1-1 Orange County in 2011/12.

Violent Crime Rate Drops; Property Crime Rate up Slightly

Description of Indicator

This indicator uses FBI Uniform Crime Reports to compare crime rates among regions and to track crime rate trends. This analysis includes violent felonies (homicide, forcible rape, robbery, and aggravated assault) and property felonies (burglary, motor vehicle theft, and larceny-theft). Also included is the trend in the number of juvenile arrests and proportion of students expelled from school.

Why is it Important?

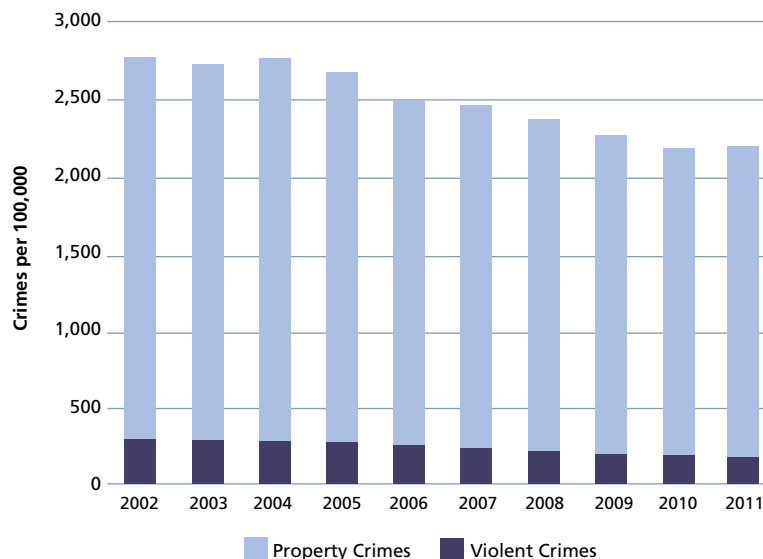
Crime impacts both real and perceived safety in a community. It can also negatively affect investment in a community if a neighborhood is considered unsafe. Tracking juvenile arrests helps the community understand the level of major and minor crime in Orange County and the extent to which youth contribute to that crime. Intervening early with at-risk youth can help reduce criminal activity in their adult lives.

How is Orange County Doing?

Orange County's overall crime rate rose a modest 0.5% between 2010 and 2011:

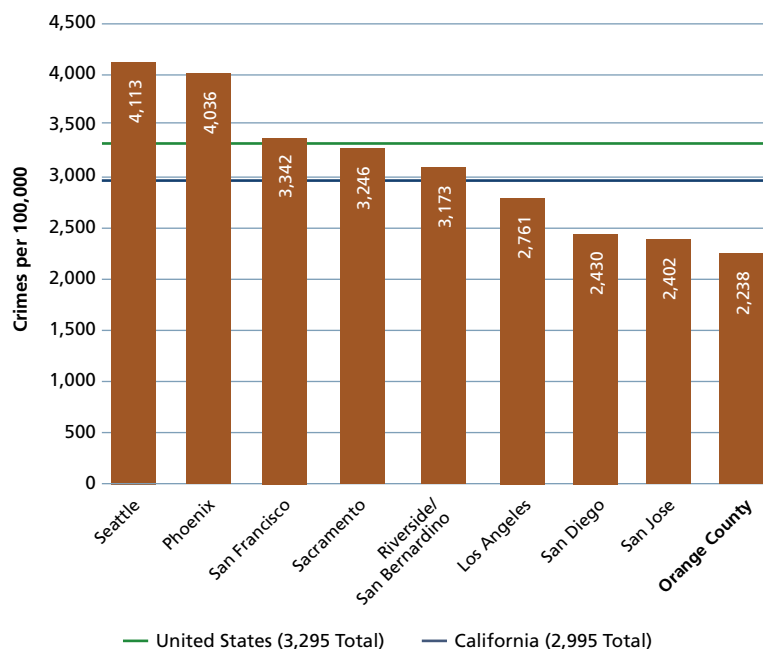
- This increase was driven by a slight increase in the property crime rate (1.2%), which comprises the majority of crime in Orange County.
- The violent crime rate fell 5.9% during the same period.
- Over the past 10 years, the crime rate in Orange County dropped 20%, or an average of approximately 2% each year.
- Compared to peers, Orange County has the lowest overall crime rate, as well as the lowest violent and property crime rates.

Crime Rate
Orange County, 2002-2011



Source: Federal Bureau of Investigation, Uniform Crime Reporting Program (www.fbi.gov/ucr/ucr.htm)

Crime Rate
Regional Comparison, 2011



Source: Federal Bureau of Investigation, Uniform Crime Reporting Program (www.fbi.gov/ucr/ucr.htm)

Juvenile Crime

- Most juvenile arrests in 2010 (69%) were for misdemeanors:
- Juvenile arrests dropped 6% between 2009 and 2010 to a total of 11,903 arrests.
- Juvenile arrests in Orange County fluctuate from year-to-year but dropped an average of 1% annually since 1994.
- Typically, juveniles account for 15% of all arrests.
- The rate of students expelled from school due to violent or dangerous behavior, or for committing a drug or firearm offense on school grounds, fell in 2010/11.

Expulsions per 1,000 Students Enrolled

Orange County and California, 2007-2011

	2006/07	2007/08	2008/09	2009/10	2010/11
Orange County	2.0	1.7	2.2	2.4	1.7
California	5.2	2.8	2.7	3.4	3.0

Sources: California Department of Justice, Criminal Justice Statistics Center; California Department of Education, DataQuest (<http://data1.cde.ca.gov/Dataquest/>)

Little Change in Gang Membership

Description of Indicator

This indicator measures gang-related crime filings, homicides, and the percentage of countywide filings that are gang-related.¹ Also measured are the numbers of gang members and gangs known to law enforcement in Orange County.

Why is it Important?

Tracking gang-related crime can help the community gauge the extent and nature of gang participation in crime. It can also aid policymakers in decisions regarding the effectiveness of programs designed to combat gang-related crime and the level of funding needed to support these programs now and in the future.

How is Orange County Doing?

The proportion of serious crime that is gang-related dropped for the second consecutive year:

- In 2011, 7.4% of all felony filings in Orange County were gang-related – down from the 10-year record high of 10.5% in 2009.²
- Gang members were responsible for 44% of countywide felony homicide/manslaughter filings, 33% of felony weapons filings, and 21% of all felony robbery charges in 2011.
- Gang-related misdemeanor and felony filings fell to 1,638; however, this figure is higher than the previous 10-year average of 1,525 filings.
- The number of victims of gang-related homicides in 2011 (15) was the lowest number in over 15 years and well below the previous 15-year average of 27 annually.
- The number of gang members stayed roughly the same in 2011, while the number of gangs grew 2% between 2010 and 2011.
- According to the 2010 California Healthy Kids Survey, 8% of 9th and 11th grade students consider themselves a member of a gang. This rate is down from 9% in 2009 and the same as the California average.

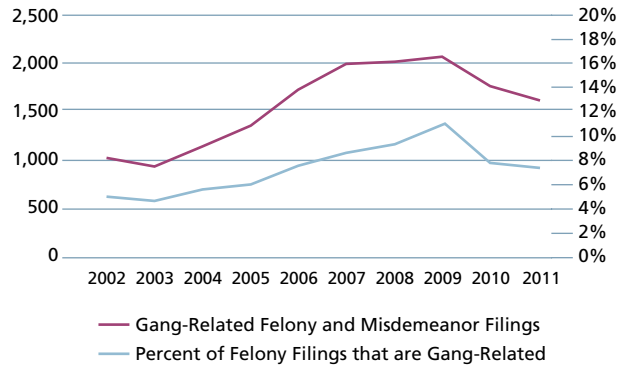
Gang Membership

Using a detailed set of criteria, law enforcement agencies submit information on gang members to a statewide law enforcement database. Gang members are removed from the state database if they have not had contact with law enforcement in the last five years.

¹ Gang-related data includes crimes filed by anti-gang units, crimes tagged as gang-related by the filing deputy district attorney, or charges specific to gangs.

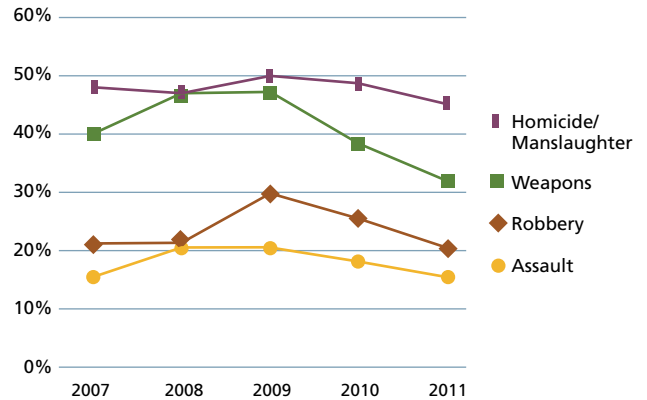
² A filing is a charging document filed with the superior court clerk by a prosecuting attorney alleging that a person committed or attempted to commit a crime.

Gang-Related Filings and Proportion of All Felony Filings that are Gang-Related, Orange County, 2002-2011



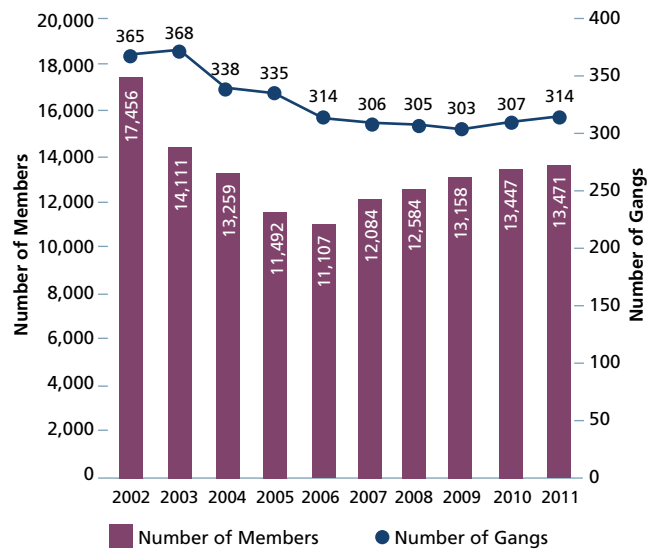
Source: County of Orange Office of the District Attorney

Anti-Gang Unit and Gang-Related Felony Filings as a Percentage of all District Attorney Filings, by Offense Orange County, 2007-2011



Source: County of Orange Office of the District Attorney

Gangs and Gang Membership Orange County, 2002-2011



Source: County of Orange Office of the District Attorney

DUI: More Severe Injuries and Deaths than State Average

Description of Indicator

This indicator tracks the number of people killed or severely injured in alcohol-involved collisions in Orange County and neighboring counties.

Why is it Important?

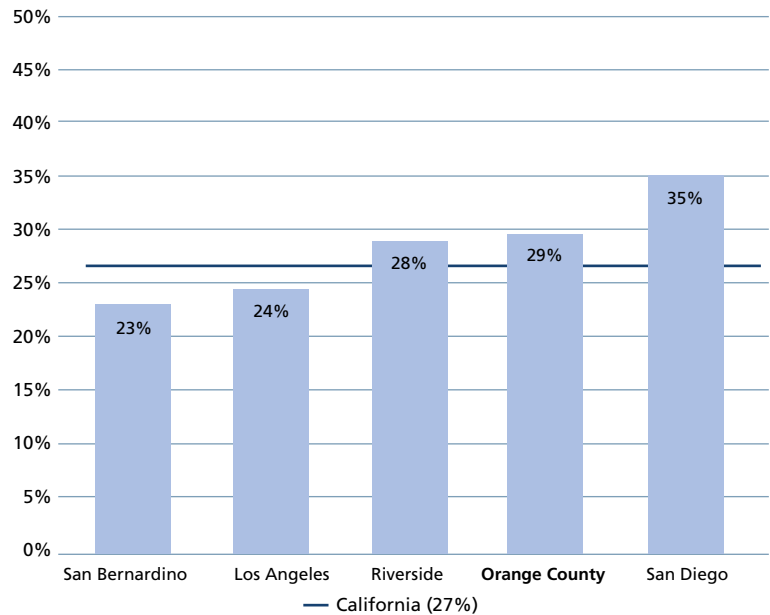
A regional comparison of victims of alcohol-involved collisions can help residents determine if the issue is more or less pronounced in Orange County. Tracking the number of victims over time allows policymakers and law enforcement to assess the effectiveness of measures used to reduce drinking and driving.

How is Orange County Doing?

In 2011, 29% of all fatalities and severe injuries in traffic collisions involved alcohol:

- Orange County's proportion of alcohol-related crash victims is higher than the state average and all other counties compared except San Diego (35%).
- At 29%, the 2011 proportion is the lowest in five years, down from the 10-year peak of 34% in 2008.
- Over the past 10 years, the total number of alcohol-involved crash victims in Orange County with fatal or severe injuries decreased 46%, from 267 victims in 2002 to 143 victims in 2011.

Percentage of Traffic Fatalities and Severe Injuries that Involved Alcohol County Comparison, 2011

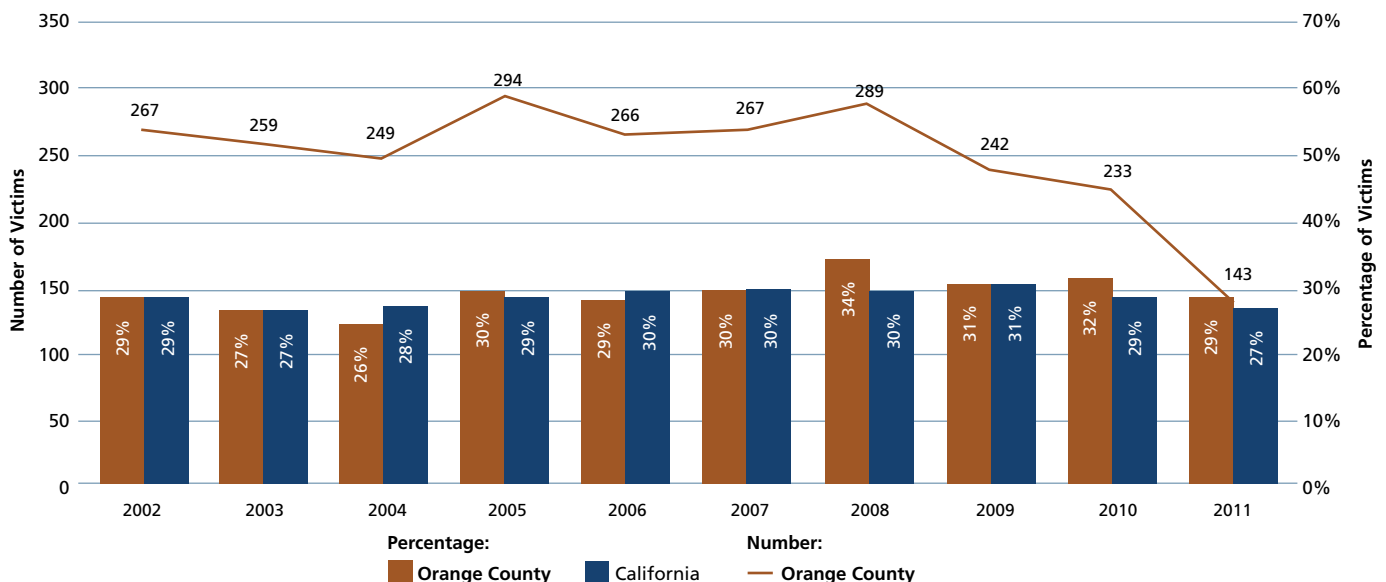


Source: Statewide Integrated Traffic Records System (SWTRIS), California Highway Patrol

Tackling Drinking and Driving


Cities and the County of Orange employ many strategies to address the problem of drinking and driving. These include: educating drivers about the dangers of drinking, drug use and driving; enhancing law enforcement training and the tools for detecting impaired drivers; improving the tracking of convicted impaired drivers; and the use of treatment programs to reduce recidivism. Orange County has a DUI Task Force that meets regularly to help reduce the number of alcohol and drug impaired vehicle-related injuries and fatalities in Orange County. The goals of the Task Force include sharing DUI information and best practices, conducting trainings and educational campaigns, and supporting law enforcement efforts. For information about activities and the 2013 DUI Summit visit www.ocduiTaskforce.org.

Number and Percentage of Traffic Fatalities and Severe Injuries that Involved Alcohol Orange County and California, 2002-2011



Source: Statewide Integrated Traffic Records System (SWTRIS), California Highway Patrol

Environment



More electricity is being produced from **renewable** sources. Despite a slight rise in water usage, the long-term forecast is for increased water conservation. Disposal of solid **waste** in Orange County landfills **dropped** to the lowest level since 1996, and a growing number of residents are bringing household hazardous waste to regional collection centers. While there were **fewer** beach **closures** and reported sewage spills, there were also **more** water quality **warnings** overall.

NATIONAL PEERS

Boston, Minneapolis, Phoenix, Seattle

CALIFORNIA PEERS

Sacramento, San Francisco, San Jose

NEIGHBORS

Los Angeles, Riverside/San Bernardino, San Diego

Utilities on Their Way to 33% Renewable Target

Description of Indicator

This indicator assesses the percentage of electricity generated from eligible renewable sources by Orange County's three major electricity suppliers. It also measures grid-connected solar installations completed through the California Solar Initiative (CSI).

Why is it Important?

Generating energy from domestic, renewable sources reduces a community's impact on the environment. It also addresses resource supply challenges from nonrenewable sources and contributes to national security. Increasing the proportion of electricity from carbon-neutral sources (such as solar) in Orange County's energy portfolio – along with reduced auto emissions – will help the county meet statewide greenhouse gas reduction goals and improve air quality.

How is Orange County Doing?

In 2011, the amount of Orange County's electricity generated from renewable sources increased for all providers:

- Southern California Edison, which provides most of Orange County's electricity, supplied 21.1% from renewable energy sources, up from 19.2% in 2010.
- San Diego Gas & Electric, which serves many south county residents, nearly doubled its renewable energy from 11.9% in 2010 to 20.8% in 2011.
- The City of Anaheim, which has its own utility, increased renewable energy from 11.0% in 2010 to 13.0% in 2011.
- The 2011 California average was 20.6% renewable energy sources, while the U.S. average lagged behind at 11.8%.

Another 18,000 kilowatts of grid-connected solar capacity was added in Orange County in 2012:

- New solar capacity in 2012 was led by a significant rise in residential installations.
- Orange County ranks below the California average for the number of kilowatts added per 100,000 residents in 2012.

Renewables Portfolio Standard

California's Renewables Portfolio Standard (RPS) is one of the most ambitious renewable energy standards in the country. The RPS program requires investor-owned utilities, electric service providers, and community choice aggregators to increase procurement from eligible renewable energy resources to 33% of total procurement by 2020. Eligible renewable sources include geothermal, biomass and waste, wind, small hydroelectric, and solar. Non-eligible sources, such as large hydroelectric projects and customer-owned generation (e.g. rooftop solar panels), do not count toward the 33%.

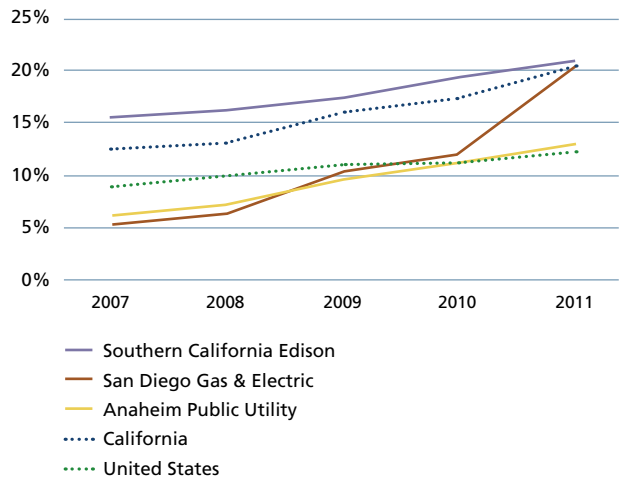
Source: California Public Utilities Commission (www.cpuc.ca.gov/PUC/energy/Renewables/overview.htm)

Grid-Connected Solar Installations

To be eligible for rebates in California, photovoltaic (PV) energy systems installed on residential, commercial, nonprofit or governmental buildings must be connected to the utility company electrical grid. As the customer's PV system produces electricity, the kilowatts are first used for any electric needs in the home or business. If more electricity is generated than the customer needs, the extra kilowatts are fed into the utility grid and customers receive the full retail value of the extra electricity their system generates.

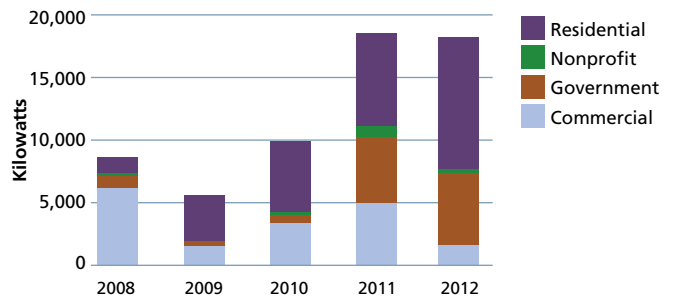
Source: California Energy Commission & California Public Utilities Commission (www.gosolarcalifornia.ca.gov)

Electricity Generated from Renewable Sources
Orange County Utilities, California, and United States, 2007-2011



Sources: Anaheim Public Utilities; San Diego Gas & Electric; Southern California Edison; California Public Utilities Commission (www.cpuc.ca.gov); U.S. Energy Information Administration (www.eia.gov/renewable/data.cfm#summary)

Grid-Connected Solar Installations Completed Annually, by Capacity and Sector
Orange County, 2008-2012



Source: California Solar Statistics (www.californiasolarstatistics.ca.gov)

Completed Grid-Connected Solar Installations
Regional Comparison, 2012

Region	Kilowatts per 100,000 residents
San Jose	1,294
Riverside/San Bernardino	1,215
San Francisco	1,071
California	941
San Diego	888
Orange County	598
Los Angeles	551
Sacramento	477

Note: Figures represent kilowatts completed in 2012, not cumulative solar capacity.

Sources: California Solar Statistics (www.californiasolarstatistics.ca.gov); California Department of Finance, Table E-2, July 2012 (www.dof.ca.gov/research/demographic/reports/view.php)

Urban Runoff Leads to More Water Quality Warnings

Description of Indicator

This indicator measures coastal water quality by tracking when ocean and bay waters are closed to the public (closures) or warning signs have been posted (postings) due to a sewage spill or other contamination. Closures and postings are shown by Beach Mile Days, which is calculated by multiplying the number of days of closure or posting by the number of miles of beach closed or posted. This measurement takes into account both the length of time and amount of beach that is unavailable for recreational use due to a closure or posting. For additional information, visit www.ocbeachinfo.com.

Why is it Important?

Ocean and bay water closures and postings discourage tourists and local residents from visiting Orange County's beaches. This results in less consumer traffic in the beach communities and diminishes our overall sense of quality of life. Furthermore, pollutants that enter the ocean or bays through urban runoff and sewage spills have the potential to compromise public health and endanger marine life. Residents can take steps to reduce stormwater pollution by properly handling litter, pet waste, motor oil, pesticides, fertilizers and toxic household chemicals.

How is Orange County Doing?

There were fewer closures but more postings in 2011:

- There were 13 Beach Mile Days of closures in 2011, compared to 68 in 2010 and 6 in 2009.
- Pipeline blockages were responsible for the majority of the closures since 1999 (63%).
- There were 164 Beach Mile Days of postings in 2011, up from 88 in 2010 but below the previous 10-year average of 196.

Sewage spills reported by sanitation districts, cities that operate sewage collections systems, and private property owners decreased for the ninth consecutive year:

- There were 181 sewage spills reported in 2011, well below the previous 10-year average of 323 spills.
- Only 3% of spills in 2011 resulted in an ocean water closure, compared to the previous 10-year average of 8%.
- Since intense rain can lead to spills and carry polluted water to ocean waters, this low level of spills resulting closures is noteworthy given slightly more Rain Advisory Days in 2011 than average (64 compared to the previous 10-year average of 61).

Closures

By state law, recreational ocean or bay waters must be closed when they have been directly contaminated by sewage or when the streams, creeks and rivers that discharge into them have been contaminated by sewage.

Postings

The Orange County Health Care Agency is required to post warning signs when water quality exceeds state bacteriological standards. This poor water quality is largely attributed to urban runoff (runoff containing pollutants such as fertilizers, road oils, litter and large amounts of bacteria from a variety of sources).

Sewage Spills

Sewage spills occur when wastewater in underground pipes overflows through a manhole, cleanout, or broken pipe. Although intense rain can overwhelm the sewer system and lead to spills, only a small fraction of all sewage spills reach the ocean and cause beach closures.

Pipeline Blockages and Breaks

Roots and grease build-up are the most common causes of pipeline blockages.

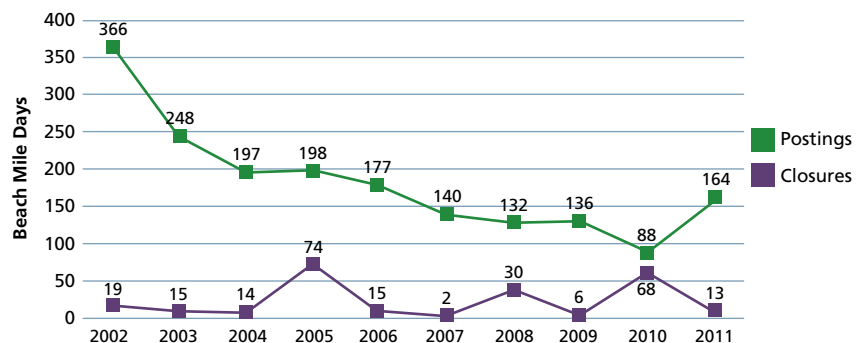
Infrastructure Capacity

Intense rain can overwhelm certain portions of a sewer system and lead to sewage spills. An aging sewer system in need of maintenance is also at increased risk of blockages and breaks.

Rain Advisory Days

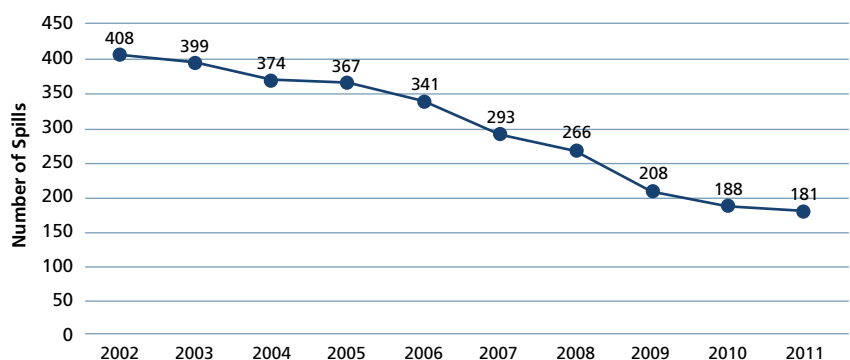
Because rain can carry urban runoff into the ocean, bays and harbors, residents are warned via a Rain Advisory to avoid contact with recreational waters during or following a rain event of 0.2 inches or more.

Beach Mile Days of Ocean Water Postings and Closures
Orange County, 2002-2011



Note: Due to the reduction of the monitoring period, posting data reflects monitoring from April 1 through October 31 and is not comparable to calendar year data presented prior to the 2011 Community Indicators Report.

Reported Sewage Spills
Orange County, 2002-2011



Source: County of Orange Health Care Agency, Public Health Services, Environmental Health (www.ocbeachinfo.com)

Drop in Solid Waste Disposal Continues

Description of Indicator

This indicator measures the tons of commercial and residential solid waste deposited in Orange County landfills. It also measures the pounds of household hazardous waste (such as oil, paint, batteries, cell phones, computers, and monitors) collected at Orange County's four regional collection facilities and the number of annual participants.

Why is it Important?

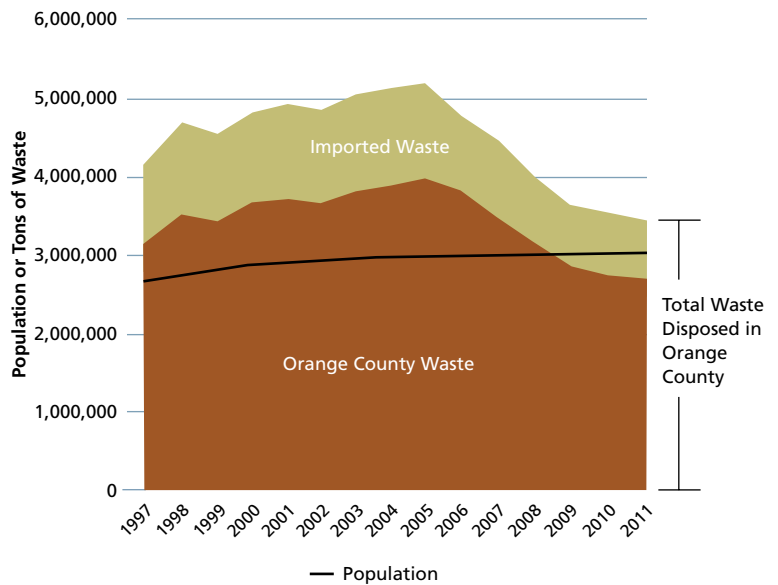
Reducing solid waste production and diverting recyclables and green waste extends the life of landfills, decreases the need for costly alternatives, and reduces environmental impact. Collection of household hazardous waste helps protect the environment and public health by reducing illegal and improper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

How is Orange County Doing?

Waste disposal decreased for the sixth consecutive year:

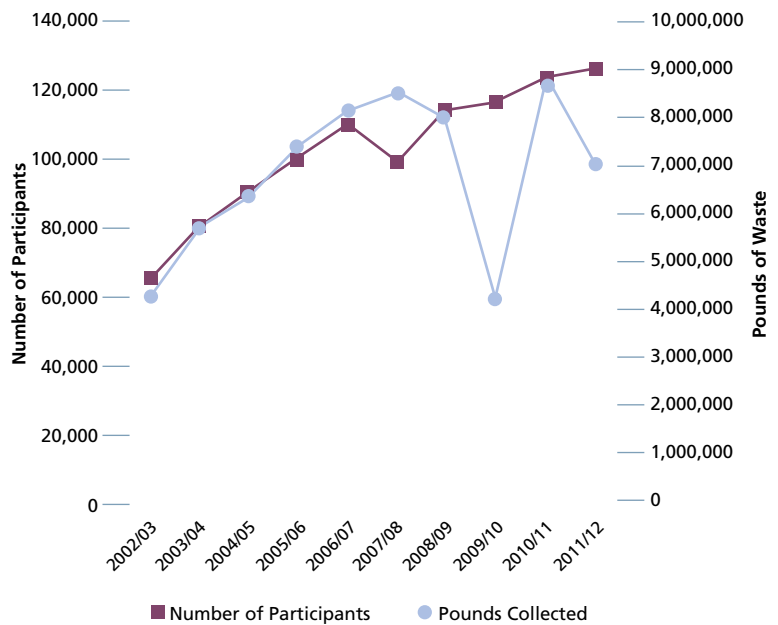
- At 2.7 million tons, waste generated in Orange County and disposed in Orange County landfills reached the lowest level since 1996.
- Over the past 15 years, the amount disposed by Orange County residents has fallen 14% while population has grown 13%.
- In 2010, all but two Orange County jurisdictions met their pounds per person target rate.¹
- The number of residents bringing household hazardous waste to regional collection centers continues to increase, rising to 126,169 participants in 2011/12 – an 85% increase over the past 10 years.
- The number of pounds collected has fluctuated in recent years, falling most recently to 7,083,904 pounds in 2011/12.
- In addition to public outreach and education to encourage proper disposal and more recycling, economic factors heavily influence solid and hazardous waste trends, with waste collection typically declining during economic downturns.

Solid Waste Disposal in Orange County Landfills Compared to Population Growth, 1997-2011



Source: OC Waste & Recycling

Household Hazardous Waste Orange County, 2003-2012



Source: OC Waste & Recycling

¹Annually, the California Integrated Waste Management Board calculates a jurisdiction's per capita disposal rates. Targets for each jurisdiction are based on these calculations. In addition to targets to determine compliance, the state also evaluates program implementation and local jurisdictions performance.

Air Quality Gradually Improving

Description of Indicator

This indicator measures Orange County's air quality (including specific pollutants) compared to neighboring and peer regions using the Air Quality Index (AQI).¹

Why is it Important?

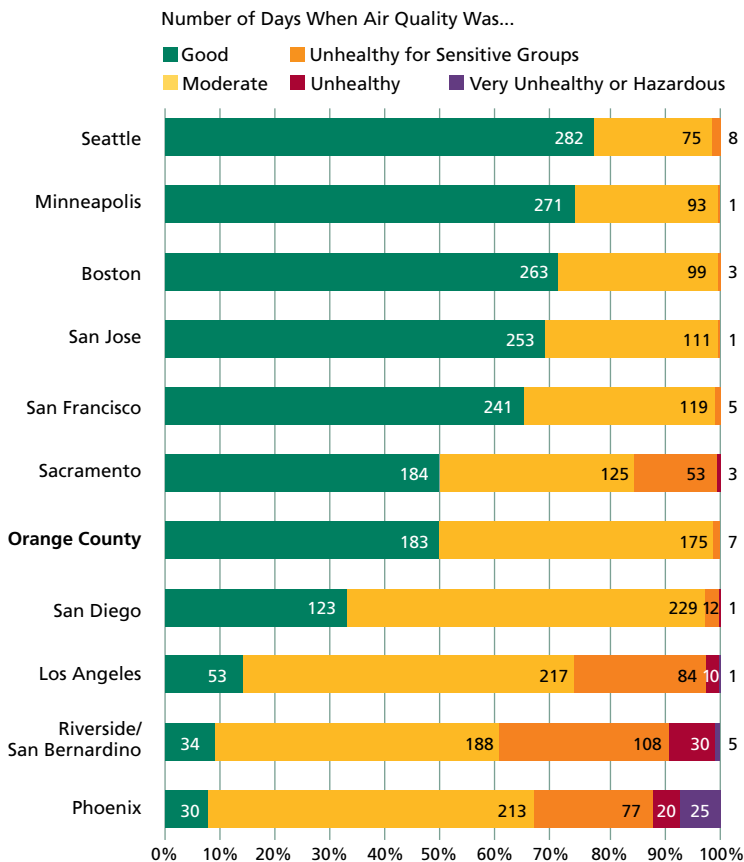
Poor air quality can aggravate the symptoms of heart and lung ailments, including asthma. It can also cause irritation and illness among the healthy population. Long-term exposure increases the risks of lung cancer, cardiovascular disease, and many other health conditions. Poor air quality can also put children's lung development at risk.

How is Orange County Doing?

In 2011, Orange County's air quality was nearly evenly split between "good" and "moderate" days:

- 183 days (50%) were in the "good" range.
- Another 175 days (48%) were in the "moderate" range.
- Seven days (2%) were considered "unhealthy for sensitive groups" and there were no days in the "unhealthy" or "very unhealthy" range in 2011.
- Orange County falls in the middle compared to neighbors and peers, with Seattle experiencing the best air quality and Phoenix experiencing the worst.
- Over the past 10 years, there has been a gradual increase of "good" days and a decrease of days considered "unhealthy for sensitive groups."
- Median AQI values have improved an average of 1% each year since 2002. The 2011 median value was 50, which is in the "good" range, bordering on "moderate."

Air Quality Index Regional Comparison, 2011



Source: U.S. Environmental Protection Agency, Air Data (www.epa.gov/airdata)

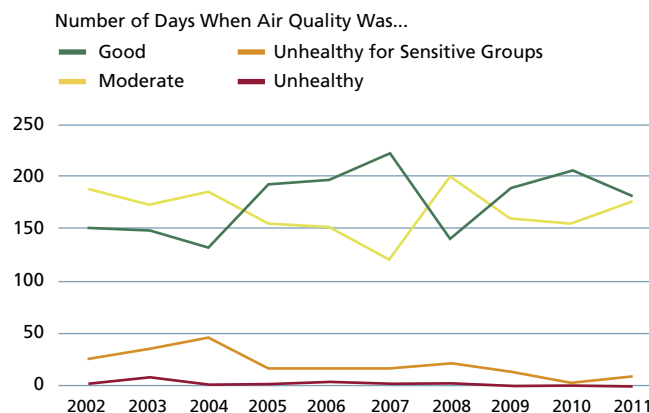
Air Quality Index

The Air Quality Index is calculated for ground-level ozone, particulate matter, carbon monoxide, sulfur dioxide, and nitrogen dioxide. The number 100 corresponds to the national air quality standard for the pollutant.

AQI 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 (<http://airnow.gov/>)

Air Quality Index Orange County, 2002-2011



Source: U.S. Environmental Protection Agency, Air Data (www.epa.gov/airdata)

¹Due to a combination of stricter air quality standards and differing calculation methodologies between the current and previously used databases, these data are not comparable to data presented previously.

Per Capita Water Usage Increases Slightly

Description of Indicator

This indicator measures Orange County’s annual urban (residential and commercial) water usage. Known and estimated costs of water by source as well as projected water use and supply through 2030 are also included.

Why is it Important?

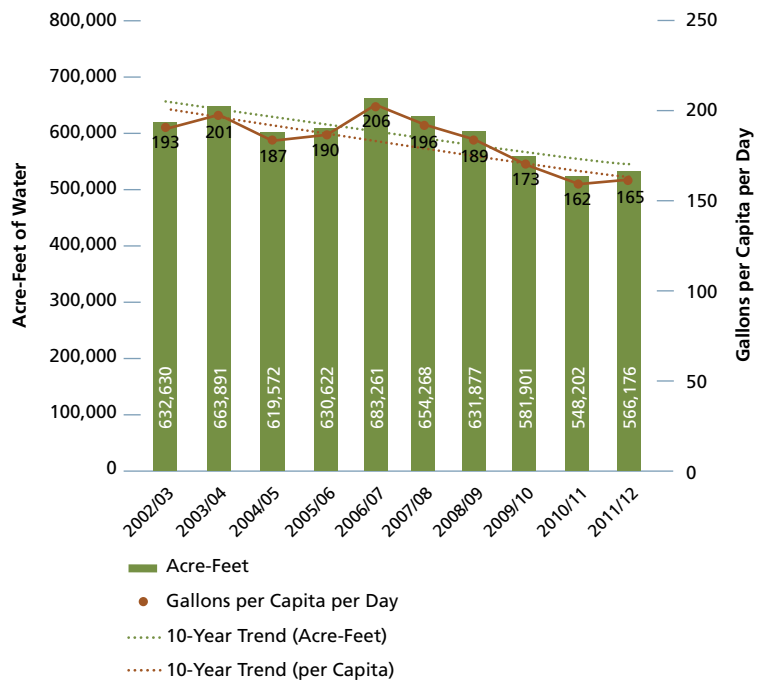
Effective water management is essential to ensure that the county has an ample water supply now and in the future. As population and business growth drive water demand, reliance on imported water will continue. The county’s long-term sustainability will also rely on increased conservation and investment in additional water supplies such as groundwater basin replenishment and desalination.

How is Orange County Doing?

Urban water usage rose slightly in 2011/12:

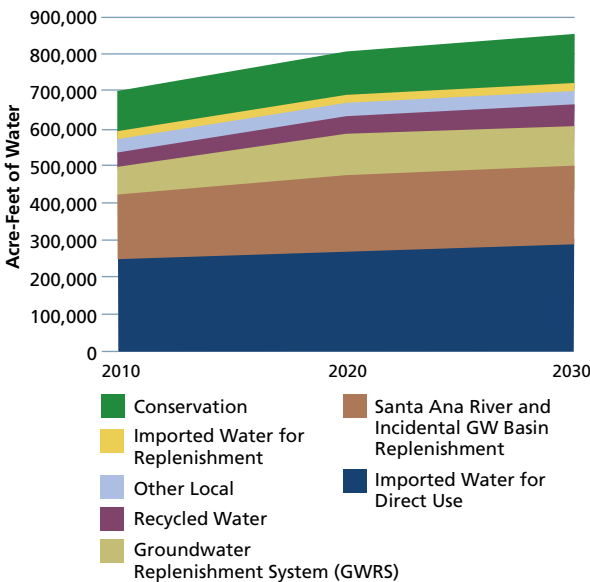
- Between 2010/11 and 2011/12, per capita usage rose 3%.
- Although usage fluctuates from year-to-year, long-term trends show per capita usage rates falling by approximately 2% annually, and overall acre-feet usage declining by approximately 1% annually – even while population grew roughly 0.5% each year.
- However, long-term projections anticipate increases in overall water use, although less than previously projected due in part to SB7.
- SB 7 passed by the state legislature requires an approximate 20% reduction in per capita usage by the year 2020. To comply with this law and meet future water demand, water conservation efforts must increase.
- Local groundwater and conservation are the least costly sources of water, while desalination and recycled water are among the most costly.
- Over the past decade (2002-2012), wholesale water costs have about doubled. This is true for both imported water (Colorado River and Northern California sources) and for Orange County Water District Basin groundwater.

Urban Water Usage
Orange County, 2003-2012



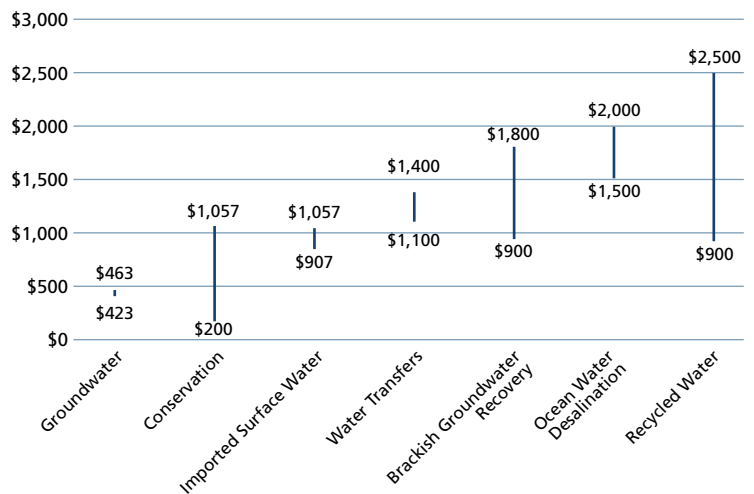
Note: Figures have been revised since previously reported.

Water Sources Projection
Orange County, 2010-2030



Note: 2010 figures reflect 2009/10 actual use. Projections have been revised since previously reported.

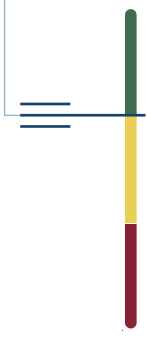
Range of Cost of Water per Acre-Foot to Retailer, by Source
Orange County, 2012



Sources: Municipal Water District of Orange County; Orange County Water District; California Department of Finance (Tables E-4 and E-1)



Civic Engagement



Orange County's **nonprofit** sector is **growing**. However, a closer look reveals that most nonprofits have **fewer resources** than in 2000, with almost half using reserves to cover expenses. Among residents eligible to vote, **59% participated** in the 2012 presidential election.

NATIONAL PEERS

Austin, Boston, Minneapolis, Seattle

CALIFORNIA PEERS

Sacramento, San Francisco, San Jose

NEIGHBORS

Los Angeles, Riverside/San Bernardino, San Diego

59% of Residents Turnout for Presidential Election

Description of Indicator

This indicator measures voter registration and voter turnout among registered voters and the voting-eligible population. Also shown are percentages of Orange County's electorate who are voting by mail.

Why is it Important?

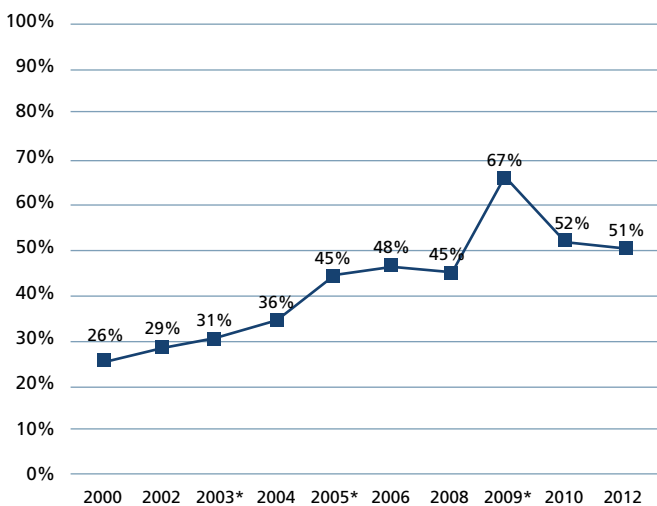
Voter participation measures civic interest and the public's optimism regarding their impact on the decision-making process. A high level of citizen involvement increases government accountability and personal investment in community issues. An increase in the number of constituents voting by mail may reduce the overall cost of holding elections.

How is Orange County Doing?

While turnout varies depending on how it is measured, Orange County maintains high voter registration:

- As of October 2012, 87% of Orange County residents who are eligible to vote were registered.
- This rate is greater than state and national averages and all peers compared.
- Among registered Orange County voters, 67% chose to vote in the November 2012 presidential general election, lower than the statewide average and all peer counties compared.
- Among all Orange County residents eligible to vote, 59% voted in the 2012 presidential election.
- This participation rate for the voting-eligible population is higher than the statewide average and all peer counties compared except San Francisco.
- In 2012, 51% of Orange County voters chose to vote by mail, the same as voters statewide.

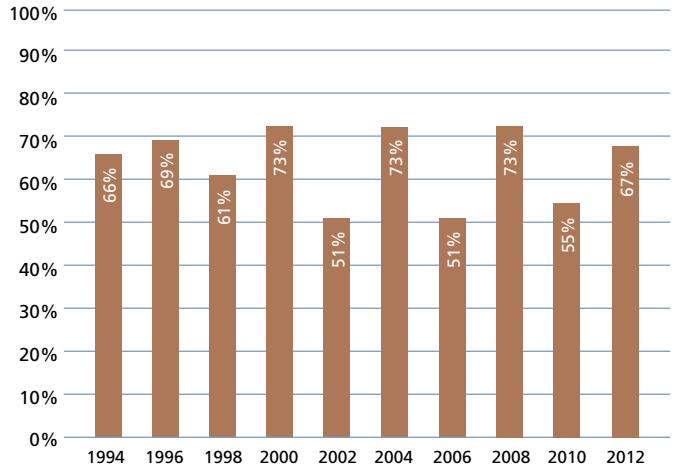
Voting by Mail in General, Mid-Term and Special Elections Orange County, 2000-2012



*Special Election

Source: California Secretary of State (www.sos.ca.gov)

General and Mid-Term Election Turnout Among Registered Voters Orange County, 1994-2012



Source: California Secretary of State (www.sos.ca.gov)

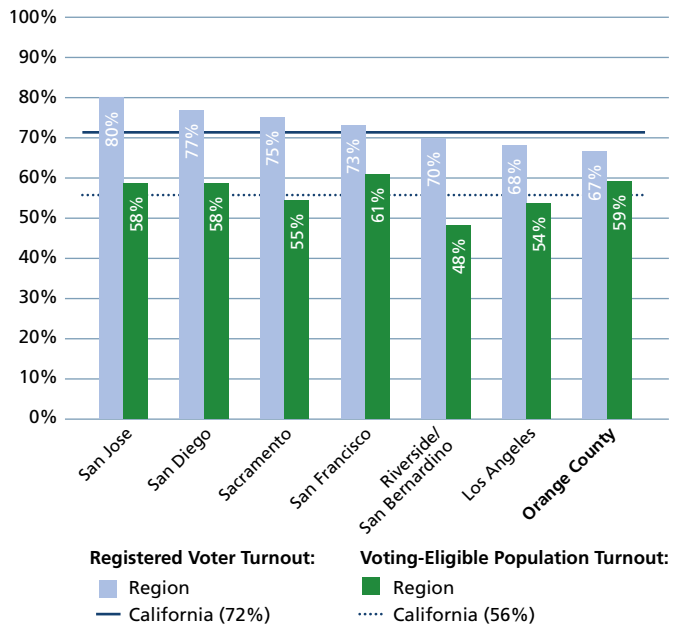
Measuring Voter Turnout

Registered voter turnout is the number of votes cast in any given election divided by the number of residents who are registered to vote. Voting-eligible population turnout is the number of votes cast divided by the number of eligible residents (U.S. citizens 18 years of age or older who are not convicted felons in prison or on parole).

Many analysts prefer voting-eligible population turnout, viewing it as a truer picture of voter participation. It takes into account the citizens who are eligible to vote but not registered, as well as the proportion of the population that is ineligible to vote – a proportion that has increased from about 2% to 10% since the 1970's.

Source: United States Election Project, George Mason University (<http://elections.gmu.edu/EAQ.html>)

Presidential Election Turnout Among Registered Voters and Voting-Eligible Population Regional Comparison, 2012



Source: California Secretary of State (www.sos.ca.gov)

Most Charities Working with Fewer Resources

Description of Indicator

This indicator assesses Orange County's nonprofit sector by tracking change in the number, revenue, and assets of financially active organizations (those with gross receipts over \$25,000) using analysis conducted by the Gianneschi Center for Nonprofit Research and OneOC. It also provides a comparison of nonprofits among peer regions using data from the National Center for Charitable Statistics.

Why is it Important?

A well-funded and supported nonprofit sector is an integral part of a healthy and stable community. Nonprofit service organizations help bridge the gap between government programs and local needs, and are a valuable contributor to the economy.

How is Orange County Doing?

Orange County's nonprofits have grown over a decade:

- Between 2000 and 2010, the number of financially active charitable organizations grew nearly 70% from 1,899 to 3,181.
- This equates to per capita growth from 6.7 to 10.6 organizations per 10,000 residents between 2000 and 2010.
- This growth is more than twice the rate of growth of charitable organizations nationwide (28%).
- In 2010, Human Services organizations comprised the highest percentage of nonprofits (29%), followed by Education (27%) and Religious (12%).
- Nonprofit revenues increased 96% from \$4.2 billion to \$8.2 billion, which equates to \$2,739 per 10,000 residents in 2010.
- Nonprofit assets increased 132% from \$7.1 billion to \$16.5 billion, for a total of \$5,479 per 10,000 residents in 2010.

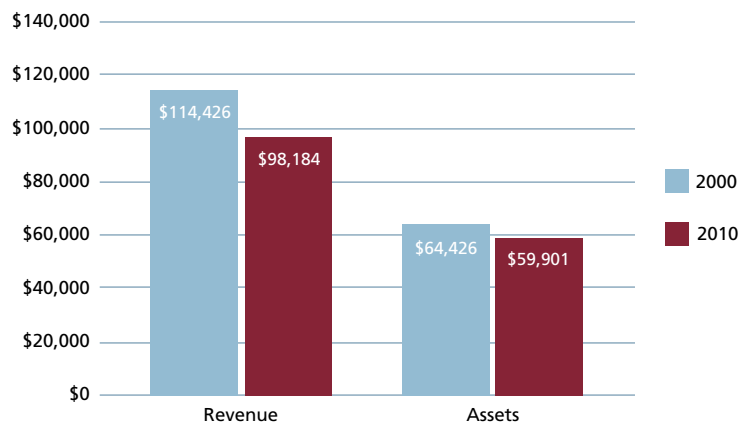
However, most Orange County nonprofits had fewer financial resources in 2010 than in 2000, based on a review of median revenues and assets:

- In 2010, median total revenues for all Orange County nonprofits were \$98,183 compared with median total revenues of \$114,426 in 2000, a decline of 14%.
- Similarly, median total assets were \$59,901 in 2010 compared with \$64,426 in 2000, a decline of 7%.
- Growth was concentrated in the largest nonprofits. The top 10 nonprofits in Orange County are hospitals and make up 54% of all nonprofit revenues.
- In contrast, 43% of nonprofits experienced a loss in 2010 and used reserves to cover expenses.

Orange County's nonprofit revenues are relatively low compared to other regions:

- In August 2012, Orange County nonprofits averaged revenue of \$3,305 per resident.
- This compares with a high of reported revenues of \$52,851 per resident in Boston and a low of \$1,446 in the Inland Empire.

Median Nonprofit Revenues and Assets
Orange County, 2000 and 2010



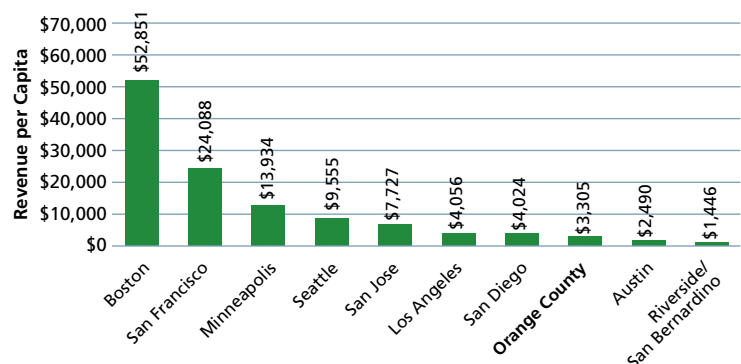
Note: A median calculation is used to assess change in revenues and assets because it moderates the dominance of the largest nonprofits, allowing for a truer picture of the majority of organizations.

Source: *Nonprofit Sector: Orange County*, Gianneschi Center for Nonprofit Research and OneOC, 2012

Defining a Charitable Organization

The Orange County-specific analysis in this indicator is based on research conducted by the Gianneschi Center for Nonprofit Research, detailed in the report *Nonprofit Sector: Orange County 2012*. This report narrows the population of registered nonprofits to a subset of filers: those with gross receipts of \$25,000 or more for a specific filing year. This additional drill-down of data from the National Center for Charitable Statistics provides a more accurate picture of how Orange County's financially active nonprofit organizations fared between 2000 and 2010. For the regional comparison, all registered public charities, which may or may not be active, are included in the analysis.

Registered Nonprofit Revenue Per Capita
Regional Comparison, August 2012



Source: National Center for Charitable Statistics (<http://nccsweb.urban.org/tableviz/bmf.php>)

Note: Data are for all registered 501(c)(3) public charities as reported by the National Center for Charitable Statistics for August 2012.

The Community Indicators report sponsors would like to thank the following organizations for providing data and expertise in support of this effort:

Anaheim Public Utilities
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California Department of Finance
California Department of Justice, Criminal Justice Statistics Center
California Department of Public Health
California Department of Transportation
California Division of Tourism
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California Energy Commission
California Highway Patrol
California Integrated Waste Management Board
California Managed Risk Medical Insurance Board
California Public Utilities Commission
California Secretary of State
California Solar Statistics
California State University, Fullerton
Capistrano-Laguna Regional Occupational Programs
Center for Demographic Research at California State University, Fullerton
Central County Regional Occupational Programs
CEOs for Cities
Chapman University
Children and Families Commission of Orange County
Children's HealthWatch
Coastline Regional Occupational Programs
Council for Community and Economic Research
County of Orange Community Services/Office on Aging
County of Orange Community Services/Orange County Housing Authority
County of Orange Health Care Agency/Environmental Health and Assessment
County of Orange Health Care Agency/Family Health Division
County of Orange Health Care Agency/Immunization Program
County of Orange Office of the District Attorney
County of Orange Public Works
County of Orange Social Services Agency
Dean Runyan Associates
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Gallup-Healthways
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Healthy People 2020
Institute for Economic and Environmental Studies at California State University, Fullerton

Metrolink
Milken Institute
Municipal Water District of Orange County
National Center for Charitable Statistics
National Low Income Housing Coalition
National Transit Database
National Venture Capital Association
North Orange County Regional Occupational Programs OneOC
Orange County Business Council
Orange County Community Foundation
Orange County Department of Education
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Orange County Waste & Recycling
Orange County Water District
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South Coast Air Quality Management District
Southern California Edison
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United States Census Bureau
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University of California, Irvine
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