AGENDA

1. Call to Order (Micah Weinberg)

2. Public Comments (Micah Weinberg)

3. Appoint New Member to the HRTC (Micah Weinberg)
   A. Collective Partnership Agreements from Potential HRTC Members (p. 2)
      ▪ VOTING ITEM- CONSIDERATION FOR APPROVAL:
          o Melanie Schlotterbeck, Banning Ranch Conservancy

4. Research Execution Strategy (Wallace Walrod)

5. Research (Robert Kleinhenz) (p. 3)
   A. Regional Summary Economic and Economic Development
   B. Labor Market Analysis
   C. Industry Cluster Analysis

6. CERF Process Feedback (Micah Weinberg)

7. Next HRTC Meeting
   ▪ Friday, May 26, 2023

8. Adjourn

9. Research Deep Dive (Optional)
   • Extra Q&A
   • Additional Research other than today’s presenters
     o Covid Recovery (p. 49)
     o ESRI Demo CERF Data Portal

10. Reminders
    
    Stakeholder Mapping Survey
    
    Outreach and Engagement RFP
Collective Partnership Agreement Letter
Community Economic Resilience Fund: Orange County Region

May 3, 2023

Dear Orange County Highroad Transition Collaborative:

Banning Ranch Conservancy is pleased to inform you that we agree with the goals and objectives of the Community Economic Resilience Fund (CERF) and therefore, will serve as a Highroad Transition Collaborative member (HRTC) to execute the CERF planning grant in the Orange County region. As a member of the HRTC, we agree to participate in developing a fair governance structure, an effective outreach and engagement plan, engage colleagues for input into the CERF process, provide guidance and approve the regional plan, approve initiatives for implementation funding, and attend HRTC meetings and stakeholder group meetings. As an HRTC member, we commit to working towards the goals set out in the grant and collectively share the weight of responsibility in creating a more inclusive, equitable, resilient, and competitive regional economy.

Our organization is a non-profit focused on the conservation of the Banning Ranch property (now called the Randall Preserve). We aim to unite the community, park management, and stewardship opportunities in this coastal corridor, which extends from the Pacific Ocean to Adams Street in Costa Mesa.

We bring to the table experience with the conservation of lands and waters, 25 years in the non-profit arena, experience with grant writing, extensive community connections, and an understanding of the potential for nature-based solutions especially as it relates to climate resilience, sustainability, and job training/opportunities. We’ve recently launched a PEER Program (Partnerships, Engagement, Equity/Inclusion, and Restoration). This includes both restoration work and community clean ups to be sure the community understands it has a role in the protection of the environment. Being able to expand this understanding to a broader community would be a goal of ours through HRTC.

Our primary contact (s) for this process will be:
Contact person: Melanie Schlotterbeck
Title: Executive Director
Email Address: ED@BanningRanchConservancy.org

Thank you for your time and consideration.

Authorized signatory:

Melanie Schlotterbeck
Executive Director
May 3, 2023
Socioeconomic Profile of Orange County

Orange County CERF
HRTC Meeting
May 12, 2023

Robert A. Kleinhenz, Ph.D.
Overview
Orange County is a Large, Prosperous Region

Size:
• Population: 3.2 million (3rd largest in California)
• Household empl: 1.6 million (3rd largest in California)
• Nonfarm jobs: 1.7 million (2nd largest in California)

Economic Well-Being
• Unemployment rate: 3.4% (5th lowest in California, below U.S.)
• Personal income/capita: $81,000 (9th highest in California)
• Median household income: $100,600 (18% higher than CA median)
Orange County is a Diverse Community

Source: U.S. Census Bureau, American Community Survey

2010
- White: 43.9%
- Hispanic or Latino: 33.8%
- Asian: 18.0%
- Two or More Races: 2.2%
- African American: 1.5%
- Some Other Race: 0.2%
- Pacific Islander: 0.2%
- Native American: 0.2%

2021
- White: 37.6%
- Hispanic or Latino: 34.1%
- Asian: 21.9%
- Two or More Races: 4.0%
- African American: 0.4%
- Some Other Race: 0.2%
- Pacific Islander: 0.1%
- Native American: 0.1%

Source: U.S. Census Bureau, American Community Survey
OC has Several Leading Industry Clusters (Cluster Scores, 2022)

Cluster Score

<table>
<thead>
<tr>
<th>Cluster</th>
<th>Orange County Cluster Score</th>
<th>California Cluster Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Devices</td>
<td>62</td>
<td>40</td>
</tr>
<tr>
<td>Local Commercial Services</td>
<td>62</td>
<td>40</td>
</tr>
<tr>
<td>Information Technology</td>
<td>54</td>
<td>54</td>
</tr>
<tr>
<td>Business Services</td>
<td>52</td>
<td>46</td>
</tr>
<tr>
<td>Financial Services</td>
<td>50</td>
<td>42</td>
</tr>
<tr>
<td>Local Education and Training</td>
<td>49</td>
<td>33</td>
</tr>
<tr>
<td>Local Financial Services</td>
<td>46</td>
<td>38</td>
</tr>
<tr>
<td>Electric Power Generation</td>
<td>44</td>
<td>39</td>
</tr>
<tr>
<td>Hospitality / Tourism</td>
<td>43</td>
<td>28</td>
</tr>
</tbody>
</table>

Source: Lightcast; U.S. Cluster Mapping Project
Future is Promising but there are Challenges

High Cost of Living

- Median price: among the highest in California
- Affordability: lowest in Southern California region
- Rent: among the highest in California and the U.S.
- Rent burden: 56% of renters spend > 30% of income on rent

Poverty: 9.9% (13th lowest in California, lower than U.S.)
Economy and Industries
## Orange County Industry Employment

<table>
<thead>
<tr>
<th>Industry</th>
<th>February 2023</th>
<th>YoY Change</th>
<th>YoY Percent Change</th>
<th>Vs. February 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Nonfarm</td>
<td>1,691,100</td>
<td>44,600</td>
<td>2.7%</td>
<td>100.5%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>169,500</td>
<td>8,700</td>
<td>5.4%</td>
<td>99.0%</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical Services</td>
<td>146,700</td>
<td>7,500</td>
<td>5.4%</td>
<td>107.9%</td>
</tr>
<tr>
<td>Arts, Entertainment, and Recreation</td>
<td>54,000</td>
<td>7,400</td>
<td>15.9%</td>
<td>98.9%</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>217,300</td>
<td>6,700</td>
<td>3.2%</td>
<td>105.6%</td>
</tr>
<tr>
<td>Government</td>
<td>165,500</td>
<td>4,800</td>
<td>3.0%</td>
<td>98.5%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>148,000</td>
<td>3,600</td>
<td>2.5%</td>
<td>99.9%</td>
</tr>
<tr>
<td>Educational Services</td>
<td>38,300</td>
<td>3,200</td>
<td>9.1%</td>
<td>114.7%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>156,000</td>
<td>2,600</td>
<td>1.7%</td>
<td>98.1%</td>
</tr>
<tr>
<td>Transportation, Warehousing &amp; Utilities</td>
<td>35,500</td>
<td>2,400</td>
<td>7.3%</td>
<td>117.5%</td>
</tr>
<tr>
<td>Other Services</td>
<td>52,900</td>
<td>1,300</td>
<td>2.5%</td>
<td>97.2%</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>39,100</td>
<td>1,300</td>
<td>3.4%</td>
<td>101.6%</td>
</tr>
<tr>
<td>Construction</td>
<td>105,000</td>
<td>1,200</td>
<td>1.2%</td>
<td>98.7%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>76,500</td>
<td>100</td>
<td>0.1%</td>
<td>97.1%</td>
</tr>
<tr>
<td>Real Estate and Rental and Leasing</td>
<td>39,900</td>
<td>100</td>
<td>0.3%</td>
<td>98.3%</td>
</tr>
<tr>
<td>Information</td>
<td>24,700</td>
<td>-</td>
<td>0.0%</td>
<td>95.7%</td>
</tr>
<tr>
<td>Administrative / Support and Waste Management</td>
<td>148,700</td>
<td>(-2,500)</td>
<td>-1.7%</td>
<td>96.9%</td>
</tr>
<tr>
<td>Finance &amp; Insurance</td>
<td>73,200</td>
<td>(-3,700)</td>
<td>-4.8%</td>
<td>92.9%</td>
</tr>
</tbody>
</table>

Source: California Employment Development Department
Orange County Gross Regional Product ($ billions), 2010-2021

Source: BEA
Orange County Gross Regional Product and Employment by Major Industry Sector

Source: BEA, EDD
Industry Cluster Ranks and Score, 2022

Cluster Score

- Medical Devices: Orange County Cluster Score 62, California Cluster Score 40
- Local Commercial Services: Orange County Cluster Score 62, California Cluster Score 40
- Information Technology: Orange County Cluster Score 54, California Cluster Score 46
- Business Services: Orange County Cluster Score 52, California Cluster Score 46
- Financial Services: Orange County Cluster Score 50, California Cluster Score 42
- Local Education and Training: Orange County Cluster Score 49, California Cluster Score 33
- Local Financial Services: Orange County Cluster Score 46, California Cluster Score 38
- Electric Power Generation: Orange County Cluster Score 44, California Cluster Score 39
- Hospitality / Tourism: Orange County Cluster Score 43, California Cluster Score 28

Source: Lightcast; U.S. Cluster Mapping Project
Traded versus Local Industries

Traded Industries
• Produce goods/services with markets that extend beyond OC
• Source of economic growth...expanding the economic pie

Local Industries
• Produce goods/services that serve the OC market (residents and visitors)
• Customers are OC residents
• Give OC communities their identities through services, amenities, etc

NOTE: Local industries have more jobs, but Traded industries jobs have higher incomes that drive OC growth overall, with spillovers to Local industries
County Workforce
OC Worker Educational Attainment, 2021

Proportion of Population 25 Years and Over

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Orange County</th>
<th>California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less Than 9th Grade</td>
<td>7.0%</td>
<td>8.8%</td>
</tr>
<tr>
<td>9th to 12th Grade, No Diploma</td>
<td>5.7%</td>
<td>6.7%</td>
</tr>
<tr>
<td>High School Graduate</td>
<td>17.4%</td>
<td>20.7%</td>
</tr>
<tr>
<td>Some College, No Degree</td>
<td>19.1%</td>
<td>19.7%</td>
</tr>
<tr>
<td>Associate's Degree</td>
<td>7.7%</td>
<td>7.9%</td>
</tr>
<tr>
<td>Bachelor's Degree</td>
<td>26.8%</td>
<td>22.1%</td>
</tr>
<tr>
<td>Graduate or Professional Degree</td>
<td>16.3%</td>
<td>14.0%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau, American Community Survey
Orange County is a Net Importer of Workers

Source: California Employment Development Department
Percent of Workers Who Worked From Home, 2016-2021

Orange County Occupational Wages by Major Occupational Group, 2022

Mean Annual Occupational Wage
Orange County - $67,741
California - $71,280

Source: Lightcast; California Employment Development Department, Occupational Employment and Wage Statistics, 1st Quarter 2022
County Demographics
Orange County Total Population and Year-Over-Year Change, 2010 - 2022

## Orange County Population Components of Change, 2010-2011 – 2021-2022

<table>
<thead>
<tr>
<th>Period</th>
<th>Births</th>
<th>Deaths</th>
<th>Natural Increase</th>
<th>Net Migration</th>
<th>Net Immigration</th>
<th>Net Domestic Migration</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-2011</td>
<td>38,231</td>
<td>17,633</td>
<td>20,598</td>
<td>15,515</td>
<td>11,027</td>
<td>4,488</td>
</tr>
<tr>
<td>2011-2012</td>
<td>37,831</td>
<td>17,790</td>
<td>20,041</td>
<td>14,770</td>
<td>11,409</td>
<td>3,361</td>
</tr>
<tr>
<td>2012-2013</td>
<td>37,616</td>
<td>18,780</td>
<td>18,836</td>
<td>6,075</td>
<td>11,854</td>
<td>-5,779</td>
</tr>
<tr>
<td>2013-2014</td>
<td>37,874</td>
<td>18,400</td>
<td>19,474</td>
<td>2,939</td>
<td>12,103</td>
<td>-9,164</td>
</tr>
<tr>
<td>2014-2015</td>
<td>38,583</td>
<td>18,975</td>
<td>19,608</td>
<td>1,117</td>
<td>12,293</td>
<td>-11,176</td>
</tr>
<tr>
<td>2015-2016</td>
<td>37,303</td>
<td>19,632</td>
<td>17,671</td>
<td>-3,207</td>
<td>15,322</td>
<td>-18,529</td>
</tr>
<tr>
<td>2016-2017</td>
<td>38,264</td>
<td>19,862</td>
<td>18,402</td>
<td>-603</td>
<td>13,689</td>
<td>-14,292</td>
</tr>
<tr>
<td>2017-2018</td>
<td>36,493</td>
<td>20,443</td>
<td>16,050</td>
<td>-10,744</td>
<td>12,327</td>
<td>-23,071</td>
</tr>
<tr>
<td>2018-2019</td>
<td>35,238</td>
<td>20,389</td>
<td>14,849</td>
<td>-16,948</td>
<td>11,253</td>
<td>-28,201</td>
</tr>
<tr>
<td>2019-2020</td>
<td>33,549</td>
<td>20,674</td>
<td>12,875</td>
<td>-19,727</td>
<td>7,777</td>
<td>-27,504</td>
</tr>
<tr>
<td>2020-2021</td>
<td>30,033</td>
<td>26,344</td>
<td>3,688</td>
<td>-27,026</td>
<td>-624</td>
<td>-26,402</td>
</tr>
<tr>
<td>2021-2022</td>
<td>31,058</td>
<td>23,516</td>
<td>7,542</td>
<td>-22,389</td>
<td>8,135</td>
<td>-30,524</td>
</tr>
</tbody>
</table>

Source: State of California, Department of Finance, E-6. Population Estimates and Components of Change by County — July 1, 2020-2022, January 2023
Orange County by Race/Ethnicity, 2010 and 2021

2010

- White: 43.9%
- Hispanic or Latino: 33.8%
- Asian: 18.0%
- Two or More Races: 2.2%
- African American: 1.5%
- Some Other Race: 0.2%
- Pacific Islander: 0.3%
- Native American: 0.2%

2021

- White: 37.6%
- Hispanic or Latino: 34.1%
- Asian: 21.9%
- Two or More Races: 4.0%
- African American: 1.7%
- Some Other Race: 0.4%
- Pacific Islander: 0.2%
- Native American: 0.1%

Source: U.S. Census Bureau, American Community Survey
Orange County and California Median Age, 2010-2021

Source: U.S. Census Bureau, American Community Survey
Population Grows but What about Labor Force?

- OC Total Pop
- Pop by Age
  - Decline in Prime Working Age
  - Decline in New Workers

- 2015: 3,050,000
- 2020: 3,100,000
- 2025: 3,150,000
- 2030: 3,200,000
- 2035: 3,250,000

- 2016: Decline in New Workers
- 2020: Decline in New Workers
- 2025: Decline in Prime Working Age
- 2030: Decline in Prime Working Age
Housing
Median Rent Price, All Homes Plus Multifamily

Orange County

United States

Mar-15 $1,986
Jul-15 $3,028
Nov-15 $1,304
Mar-16 $1,976
Jul-16 $500
Nov-16 $1,000
Mar-17 $1,500
Jul-17 $2,000
Nov-17 $2,500
Mar-18 $3,000
Jul-18 $3,500
Nov-18 $1,976
Mar-19 $3,028
Jul-19 $1,986
Nov-19 $1,304
Mar-20 $1,976
Jul-20 $500
Nov-20 $1,000
Mar-21 $1,500
Jul-21 $2,000
Nov-21 $2,500
Mar-22 $3,000
Jul-22 $3,500
Nov-22 $1,986

Source: Zillow, Zillow Observed Rent Index (ZORI)
Total Housing Units and Household Size in Orange County, 2010-2022

Source: California Department of Finance
Orange County Mix of Housing Stock, 2010-2022

<table>
<thead>
<tr>
<th>Type</th>
<th>2010</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Detached</td>
<td>51.0%</td>
<td>49.7%</td>
</tr>
<tr>
<td>Single Attached</td>
<td>12.2%</td>
<td>12.0%</td>
</tr>
<tr>
<td>Two to Four</td>
<td>8.7%</td>
<td>8.5%</td>
</tr>
<tr>
<td>Five Plus</td>
<td>24.9%</td>
<td>26.8%</td>
</tr>
<tr>
<td>Mobile Homes</td>
<td>3.2%</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

Single- and Multi-Family Building Permits in Orange County, 2010-2022

OC Regional Housing Needs Allocation (RHNA): 183,861 units → 18,000/yr

Source: Construction Industry Research Board
Economic Well-Being/Stress
Orange County Income per Capita Exceeds CA and LA County

Income Per Capita in $

Source: BEA
Orange County and California Median Household Income, 2010-2021

Source: U.S. Census Bureau, American Community Survey
Orange County Median Income by Educational Attainment, 2021

<table>
<thead>
<tr>
<th>Educational Attainment</th>
<th>Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less Than High School Graduate</td>
<td>$30,043</td>
</tr>
<tr>
<td>High School Graduate (includes equivalency)</td>
<td>$36,165</td>
</tr>
<tr>
<td>Some College or Associate's Degree</td>
<td>$46,107</td>
</tr>
<tr>
<td>Bachelor's Degree</td>
<td>$74,838</td>
</tr>
<tr>
<td>Graduate or Professional Degree</td>
<td>$98,289</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau, American Community Survey
Orange County and California Median Household Income by Race/Ethnicity, 2021

Source: U.S. Census Bureau, American Community Survey
Orange County and California Poverty Rates by Race/Ethnicity, 2021

Source: U.S. Census Bureau, American Community Survey. *Data for Pacific Islanders in Orange County was not available for 2021.
National Equity Atlas – Housing Burdened in Orange County

Proportion of Population

<table>
<thead>
<tr>
<th>Group</th>
<th>Workers Earnings at Least $15/Hr</th>
<th>Housing Burdened</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>80%</td>
<td>84%</td>
</tr>
<tr>
<td>Asian American</td>
<td>56%</td>
<td>58%</td>
</tr>
<tr>
<td>Black</td>
<td>57%</td>
<td>59%</td>
</tr>
<tr>
<td>Latino</td>
<td>65%</td>
<td>51%</td>
</tr>
<tr>
<td>Mixed/Other</td>
<td>85%</td>
<td>73%</td>
</tr>
<tr>
<td>People of Color</td>
<td>58%</td>
<td>54%</td>
</tr>
<tr>
<td>White</td>
<td>90%</td>
<td></td>
</tr>
</tbody>
</table>

Source: National Equity Atlas
Mean Commute Time for Counties in Southern California, 2010-2021

Source: U.S. Census Bureau, American Community Survey. *Data for 2020 not available.
Percent of Uninsured in Orange County and Regional Peers, 2021

Source: U.S. Census Bureau, American Community Survey
CalEnviroScreen 4.0 – Pollution Burden

Source: California Environmental Protection Agency, CalEnviroScreen 4.0
Orange County and Regional Peer Distressed Community Index, 2021

<table>
<thead>
<tr>
<th>Region</th>
<th>Distressed Community Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orange County</td>
<td>11.8</td>
</tr>
<tr>
<td>San Diego</td>
<td>14.4</td>
</tr>
<tr>
<td>Riverside</td>
<td>21.2</td>
</tr>
<tr>
<td>San Bernardino</td>
<td>34.1</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>38.4</td>
</tr>
</tbody>
</table>

Source: Economic Innovation Group, Distressed Communities Index
California Healthy Places Index – Orange County

- Social: 94.6%
- Education: 87.5%
- Economic: 82.1%
- Transportation: 57.1%
- Healthcare Access: 44.6%
- Neighborhood: 42.9%
- Clean Environment: 19.6%
- Housing: 5.4%

Source: Public Health Alliance of Southern California; California Healthy Places Index
Thank You!

Questions??
Map Link: https://www.arcgis.com/apps/dashboards/048fb9c488ab428888bfdf01b4e58465

Title:
OC County COVID Cases and Vital Conditions

Summary:
The dashboard provides a landscape of COVID-19’s impact on the region in two maps. The first map of “Orange County COVID-19 Totals” spatially visualizes COVID cases and deaths at the zip code level. The second map, “Orange County COVID Vulnerability Index,” depicts communities’ vital conditions at the Census tract level and includes ranks for several key indicator categories.

Extended Explanation:

**Orange County COVID-19 Totals**
Toggle between a spatialized view of COVID-19 cases and deaths by clicking on the tabs at the bottom of the map. To view the overall number of COVID cases and deaths at the zip code level, click on the square select button in the map’s upper left hand corner. The numbers for both cases and deaths will change in the left hand column as varying zip codes are selected.

**Orange County COVID Vulnerability Index**
Key indicators reflect vital conditions in communities’ facing the lasting impacts of COVID-19. Indicator categories include: Economic Quality Rank; Education Quality Rank; Housing Quality Rank; Environment Quality Rank; Neighborhood Quality Rank. Individual ranks have been assigned to each indicator based on pre-covid socio-economic indicators and can be viewed at the Census tract level by clicking the square select button in the upper lefthand corner of the map’s window. Once a tract has been selected, the information in the Data Detail pane, quintile and category ranks, on the bottom will change reflecting the key indicator data specific to that tract.

*Please note, this map layer displays potential for community impact; outcomes are highly dependent on external factors such as intervention by governing bodies, nonprofits, community organizers, etc.*