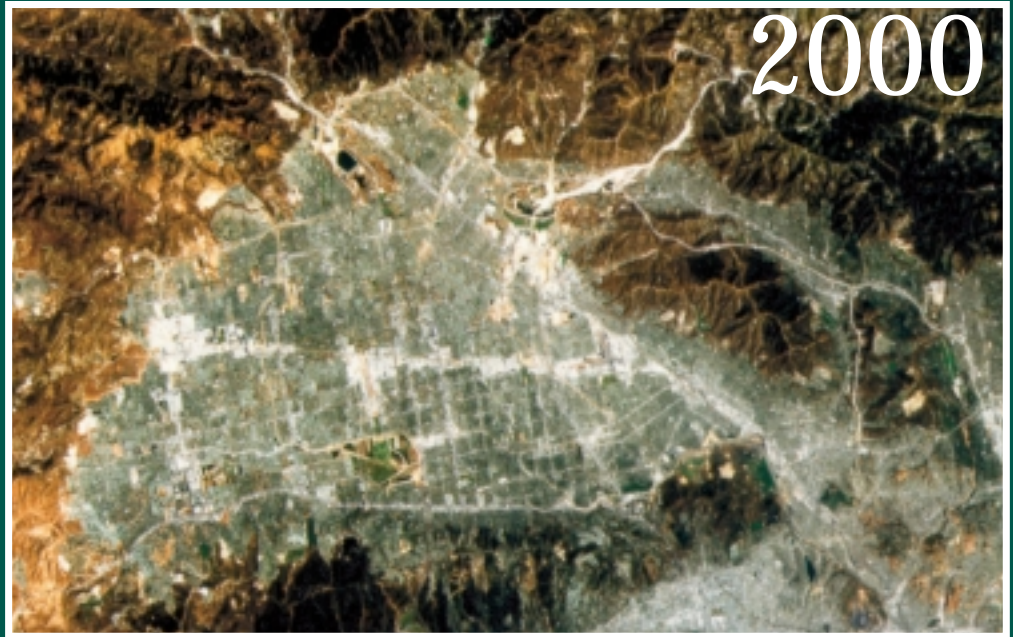




San Fernando Valley ALMANAC



BURBANK • CALABASAS • GLENDALE • LOS ANGELES • SAN FERNANDO

\$50



Economic Alliance board of directors 2000-2001

EXECUTIVE BOARD OF DIRECTORS

Chairman David W. Fleming
Executive Vice Chair Robert L. Scott
Vice Chair Cathy Maguire
Treasurer Thomas R. Soulé
President and CEO Bruce D. Ackerman

Representatives

United Chambers of Commerce: J. Richard Leyner, Tom Soulé, Gerald Curry

Valley Industry and Commerce Association: Cathy Maguire, Walter Mosher, Robert L. Scott

Small Manufacturers Association of California: David Goodreau

San Fernando Valley Conference and Visitors Bureau: Justin Aldrich

Valley Economic Development Center: Wayne Adelstein, Marvin Selter

Valley International Trade Association: Martin Gopelt

Southland Regional Association of Realtors: Millie Jones

Valley Leadership Institute: Barbara Perkins

Educational Community: Tyree Wieder, Rocky Young

Burbank: Robert Ovrom (City Manager)
Calabasas: Lesley Devine (Councilmember)
Glendale: Sheldon Baker (Councilmember)
Los Angeles: William Violante (Deputy Mayor)
San Fernando: Silverio Robledo (Mayor Pro Tem)

At Large Members:

David W. Fleming
 William C. Allen
 LeRoy Chase
 Ike Massey
 Gary Thomas

Ex Officio Members:

Bruce Ackerman
 Debbie Adelsberg
 Roberto Barragan
 Bonny Herman
 David Iwata
 Debra Sakacs

BOARD OF DIRECTORS

Ex Officio (No Term) Bruce Ackerman CCE, President and CEO, Economic Alliance

TERM ENDING NOVEMBER 2000

Wayne Adelstein, Valley Business Journal
 Lee Kanon Alpert, Alpert & Barr
 William C. Allen
 Robert Arias, One to One
 Bert Boeckmann, Galpin Motors
 William Borellis, Consultant
 Jeff Brain, Valley Vote
 Priscilla Brehm, Morton Capital Management
 LeRoy Chase, Boys and Girls Clubs
 Gerald E. Curry, Law Offices of Gerald E. Curry
 Lesley Devine, City of Calabasas
 James Dunn, Airtel Plaza Hotel
 Victor J. Gill, Burbank Glendale Pasadena Airport
 Cecilia Glassman, Consultant
 Martin Gopelt, Comerica Bank
 Richard Hardman, Northridge Chamber of Commerce
 Marie Harris, Retired
 Janel Huff, California Trade and Commerce
 Jeff Krivis, First Mediation Corp.
 Nancy LaSota, Retired
 Joe Lucente, Fenton Avenue Charter School
 Dale Ma, AAA Fast Foods
 Rafi Manoukian, City of Glendale
 James G. Morris, Morris & Assoc.
 Walter Mosher Ph.D., Precision Dynamics
 Robert Bud Ovrom, City of Burbank
 Gloria Pollack, Time Warner Communications
 William Blinky Rodriguez, CIS
 Carol Rowen, Los Angeles Board of Harbor Commissioners
 Jeffrey A. Schwartz, Autoweb.com
 Roger Seaver, Northridge Hospital Medical Center
 Marvin Selter, CMS Inc.
 Irwin Silon, Retired
 Robert M. Tague, City of Burbank
 Gary M. Thomas, The Aaron Group
 Matthew A. Toledo, Los Angeles Business Journal
 Andrea M. Troutman, Los Angeles Times
 Fred Weinhart, Management Services Unlimited

TERM ENDING NOVEMBER 2001

Justin Aldrich, Autry Museum of Western Heritage
 Harlan Barbanell Ph.D., LAUSD
 Jane Boeckmann, Valley Magazine
 Rev. Zedar Broadus, NAACP
 Nate Brogin, The Brogin Companies
 Wendy Brogin, The Brogin Companies
 Barry Cohn, Imperial Bank
 Gary Forsch, Roscoe Hardware
 David Goodreau, Small Manufacturers Association
 Lee K. Harrington, LAEDC
 Horace Heidt, Horace Heidt Productions

Bonny Herman, VICA
 Helen Hernandez, The Legacy Group International
 Irma Horvath, Pacific Bell
 William Hosek Ph.D., CSUN
 Millie Jones, SRAR
 Mannon Kaplan CPA, Miller, Kaplan, Arase & Co.
 Gerald Katell, Katell Properties
 Richard Katz, Katz Consulting
 Steven W. Lew, Universal Studios
 Cathy Maguire, The Gas Co.
 Ike Massey, Daily News
 Julian Montoya, Burrito King
 Sanford Paris, Paris Industrial Parks
 Bob Patterson, City National Bank
 Barbara Perkins, VLI
 Benjamin M. Reznik, Jeffer, Mangels, Butler & Marmaro LLP
 Silverio Robledo, City of San Fernando
 Irwin Rosenberg, Laidlaw Transit Inc.
 Mike Rueff, The Rueff Family Foundation
 Debra Sakacs, United Chambers Of Commerce
 Corine Sanchez, El Proyecto del Barrio
 Robert L. Scott, Scott & Assoc.
 Barry Sedlik, Southern California Edison Co.
 Phillip Flip Smith, Flip's Tires
 Linda Smith, Union Bank of California
 Thomas R. Soulé CPA, Thomas R. Soulé CPA
 Pauline Tallent, Tallent & Associates, Realtors
 Tom Teofilo, World Trade Center Association
 Candice Vorhies, VITA
 Julia C. Wilson, Los Angeles Times

TERM ENDING NOVEMBER 2002

Sheldon Baker, City of Glendale
 Kenneth Banks, K.B. Insurance
 Ken Bernstein, LA Conservancy
 Roberto Barragan, VEDC
 Dallas Boardman, Dallas Boardman & Assoc.
 Pam Corradi, The Pam Corradi Company
 David W. Fleming, Latham & Watkins
 Sonda Frohlich, Sherman Oaks Chamber of Commerce
 Gus Garcia III, Rydell Automotive Group
 Sandy Miller Goldman, BFI
 Richard Goodrich, Bank of America
 Joseph Gray, American Express Financial Advisors
 Susan Harris, Pacific Bell
 David Honda, D.S. Honda Construction
 Ross Hopkins, Ross Hopkins & Assoc.
 Don Hudson, Warner Center Properties
 Mike Jimerson, Boeing Rocketdyne
 Andrew Kane, Arthur Anderson
 J. Richard Leyner, Capital Commercial Real Estate
 Michael Mizrahi, The Gas Co.
 Ken W. Patton, Glendale College
 Gregory Posner, Kaiser Permanent
 Walter Prince, Executive Sweet Services
 David Rattray, Unite LA
 Robert Rodine, The Polaris Group
 Nancy Schmidt, First Western Bank
 Jim Sherman, West Hills Hospital Medical Center
 Shirley Svorny Ph.D., CSUN
 Arthur Sweet, A & E Development Co.
 C.K. Tseng, Northridge Travel
 Bill Violante, City of Los Angeles
 Francisco Uribe, GTE
 Tyree Wieder Ed.D., LA Valley College
 Randy Witt, Randy Witt Productions
 Ken Worthen, Retired
 Darroch Rocky Young Ed.D., LA Pierce College



San Fernando Valley Almanac 2000



Detailed Data and Updates Available at
www.valleyofthestars.org

On behalf of the residents and business community of the San Fernando Valley we wish to thank our sponsor The James Irvine Foundation for their generous support of this project.



THE JAMES IRVINE FOUNDATION
FOR THE PEOPLE OF CALIFORNIA

The James Irvine Foundation is a private grantmaking foundation dedicated to enhancing the social, economic, and physical quality of life throughout California, and to enriching the State's intellectual and cultural environment.

© Copyright 2000, Economic Alliance of the San Fernando Valley and the Civic Center. All rights reserved. The Valley Almanac is a publication of the Economic Alliance of the San Fernando Valley, 15205 Burbank Boulevard, Second Floor, Van Nuys, California 91411 (818) 947-0708 produced by Civic Center, 23161 Ventura Boulevard, Suite 205, Woodland Hills, California 91364 (818) 222-2073.



Project Participants

Project Participants / Advisors

P. Kenneth Ackbarali - Director of Economic Consulting for the Economic Development Corporation of Los Angeles County

Wayne Adelstein - Publisher, Valley Business Journal. Consultant, Asian Business Association and the Port of Los Angeles

Bill Allen - Past President, Economic Alliance of the San Fernando Valley

David Auger - Former Regional Vice President, General Manager Time Warner Communications

Jane Boeckmann - President, World of Communications, Publisher of Valley Magazine

Bert Boeckmann - President and Owner, Galpin Motors. Commissioner, Los Angeles Police Commission

James Bozajian - Former Mayor, City of Calabasas, Deputy District Attorney, County of Los Angeles

Rev. Zedar Broadous - President, NAACP of the San Fernando Valley, Publisher David Butler - Editor, Los Angeles Daily News, Vice President Los Angeles Newspaper Group

Charles Cate - City Manager, City of Calabasas

Yvonne Chan, Ph.D. - Principal of the Vaughn Next Century Learning Center, Adjunct Professor UCLA / California State University

Leroy Chase - Director, Boys & Girls Club of the San Fernando Valley, Commissioner, Los Angeles City Recreation & Parks Commission

David W. Fleming - Of Counsel, Latham & Watkins, Commissioner, California Transportation Commission, Commissioner, Los Angeles City Fire Commission

Shelley Garcia - San Fernando Valley Business Journal

Rickey M. Gelb - Gelb Enterprises

Tom Hayden - California State Senator

Bonnie Herman - President, Valley Industry and Commerce Association, Director, Metropolitan Water District

Robert Hertzberg - California State Assemblyman

Lew Horne - Senior Managing Director, CB Richard Ellis, Inc.

William Hosek, Ph.D. - Dean, College of Business Administration and Economics, California State University, Northridge

Con Howe - Director of Planning, City of Los Angeles

Bing Inocencio, Ph.D. - Past President of Los Angeles Pierce College

David Iwata - President, San Fernando

Valley Conference and Visitors Bureau

Millie Jones - Public Affairs Director, Southland Regional Association of Realtors

Richard Kasper - Former CFO, Los Angeles Daily News and Los Angeles Newspaper Group

James B. Koslow - CEO, Koslow & Associates

Philip S. Lanzafame - Economic Development Administrator, City of Glendale

Steven W. Lew - Universal Studios and Past Chairman, Valley Industry & Commerce Association

Steven Scott MacDonald - Director, Development Services, Department of Building & Safety, City of Los Angeles

Thomas G. McDonald, MCRS - Vice President, Cushman Realty Corporation

Bob Meyler - Financial Consultant, Past-President, United Chambers of Commerce of the San Fernando Valley

Don Nakamoto - Administrative Analyst, Verdugo Private Industry Council

William E. Norlund, Ph.D., Ed.D. - Past President, Los Angeles Mission College

George Nadel Riven, CPA - Partner-in-Charge, Broadcasting Services, Miller, Kaplan, Arase & Co.

Sanford P. Paris, J.D., B.S. - Owner, Paris Industrial Parks

Ken Patton, Ph.D. - Dean, Career Education/Economic Development, Glendale Community College

Robert L. Rodine - Financial Consultant, The Polaris Group

Connie L. Romney - Former Vice President, Manager, Union Bank of California

Jeffrey Schwartz, Ph.D. - Vice President, Strategic Development, Autoweb.com, Former Director, Corporate Affairs, The Walt Disney Company

Robert L. Scott - Principal, Scott & Associates / Civic Center, Commissioner, Past President, Los Angeles City Planning Commission

Gerald A. Silver, Ed.D. - Author, Professor of Business Administration (ret), President, Homeowners of Encino

Ron Sorenson - Planning Manager, Providence Health Systems, Holy Cross Hospital, St. Joseph's Medical Center

Robert Tague - Community Development Director, City of Burbank. Assistant Executive Director, Burbank Redevelopment Agency

Gary Thomas - Vice President, Victory Web & Graphics

Matt Toledo - President / Publisher, Los Angeles Business Journal, San Fernando Valley Business Journal

Andrea Troutman - Northern Regional Manager, Times in Education, Los Angeles Times

Robert Voit - Chairman and CEO, Voit Companies

Candace Voorheis - Executive Director and President, Valley International Trade Association

Fred Weinhart - Principal, Management Services Unlimited

Tyree Wieder, Ph.D. - President, Los Angeles Valley College

Blenda Wilson, Ph.D. - Past President, California State University Northridge

Valley Information Project Committee Participants

Bill Allen

David E. Boiselle

Joann Deutch

David Iwata

Millie Jones

Steve MacDonald

Nancy Nishikawa

Sanford Paris

Walter Prince

Debra Reed

Bob Rodine

Bob Scott

Jim Stewart

Shirley Svorny

Gene Waldman

Fred Weinhart

Valley Almanac Team

Publisher: Civic Center

Editor: Robert L. Scott

Associate Editors: Ellen Fitzmaurice,

Bruce Ackerman

Editorial & Research:

Bill Allen, Joel Kotkin, David Bloom,

James B. Koslow, Robert L. Rodine, Bob

Scott, Marcia Dinneen

Photography: Bill Allen, World of Communications, Valley Magazine, Bob Scott,

Phillip Lanzafame, City of Glendale

Special Thanks To:

City of Burbank

City of Calabasas

City of Glendale

City of Los Angeles

City of San Fernando

County of Los Angeles

InfoUSA / ABI

Los Angeles City

Planning Department

Southland Regional

Association of Realtors

U.S. Census Bureau

Valley Magazine



TABLE OF CONTENTS

Board of Directors, Economic Alliance 2000-2001	i
Valley Information Project, Project Participants	2
Table of Contents	3
Welcome Message	4
The Cities of the San Fernando Valley	5
Global Significance of the San Fernando Valley	6
Economic Overview	7
“The Midopolis in the Digital Economy”	8
Quality of Life	10
Temperature and Precipitation	12
Residential Real Estate Trends	13
Business Trends	14
Motion Pictures, Television and Entertainment	15
Businesses with a Significant Presence in the San Fernando Valley	16
Business Clusters	18
“Voices of the Community” Public Opinion Survey	20
Climate Tables	23
Shopping Opportunities	24
Culture, History, Recreation	25
Commercial Real Estate Trends	26
Construction and Building Permits	28
Retail Sales by Category, Type and Number of Establishments	29
Employment	30
Employment Clusters, 31	
Institutions, Educational, Research and Cultural	32
Technical, Specialty and Trade Schools	40
Kindergarten through 12th Grade Education	41
Student Performance	42
Hospitals, Health and Welfare	44
Public Safety, Crime	46
Transportation and Freight	48
Communications and Media	50
Demographics	51
Housing Trends	52
Occupancy	53
Units and Rents	54
Population	55
Households	56
Families	57
Apartments and Condominiums	58
Age and Language	59
Diversity	60
Education and Achievement	61
Income and Occupations	62
Endnotes, Methodology	64

The San Fernando Valley

Southern California’s San Fernando Valley is surrounded entirely by mountain ranges and supports a population in excess of 1.6 million. This 345 square mile valley is possessed of unique economic assets and has developed its own distinct cultural and social identity. Comprised of six California municipalities; Burbank, Calabasas, Glendale, Hidden Hills, Los Angeles, and San Fernando, the Valley has many issues and challenges that are best addressed in a unified regional fashion. The Valley is widely recognized as a leader in such fields as entertainment, health care, insurance, aerospace, technology and finance. Because it is a composite of cities and unincorporated county areas, the Valley has been challenged in developing a consistent economic identity or a consensus of leadership.

This Valley Almanac is designed to help define and better understand the San Fernando Valley and to provide fundamental support for efforts to improve the prosperity, health and well being of Valley residents. This is accomplished by identifying, developing and maintaining a base of information to assist in tracking future progress, and to facilitate improved economic management and community stewardship. As a result, the Valley’s role as a unique but critical component of the wider marketing region will be further clarified.



The information contained in this publication is presented as a public service, and has been primarily gathered from sources believed to be reliable. Users of this information are advised to contact original sources when information is being relied upon.



Welcome

Welcome to the first edition of the San Fernando Valley Almanac, a compendium of the statistics and figures that together roughly describe a unique, fast-growing and distinctive community that is undergoing rapid change and development on the cusp of a new millennium. The authors of this almanac hope that it functions as both a snapshot of where the Valley is, and a baseline for future generations to understand how far the Valley has come.

To begin with, we should describe the geographic parameters of this region. The Santa Susanna and Santa Monica mountains largely surround the Valley, providing stunning vistas and air-quality challenges, along with distinct physical boundaries that help shape the area's strong sense of identity. More than 1.6 million people live in the giant, 345-square-mile bowl known as the Valley, in unincorporated parts of Los Angeles and Ventura counties, and within six cities: Burbank, Calabasas, Glendale, Hidden Hills, San Fernando and roughly the northern half of Los Angeles, above Mulholland Drive.

Neighborhoods range widely, from massive mansions, to bucolic and modest suburban tract homes to crowded low-income neighborhoods. Where once the region was known as a largely white, middle-class bastion, it is now a remarkably diverse region, with people from all over the world now making their homes and livelihoods here.

After a bumpy transition period following the decrease in federal defense-related spending in the early 1990s, the region has blossomed economically with the



Bill Allen

Past President/CEO

explosion in international markets for its many entertainment businesses, led by some of the world's best-known movie studios, television networks and record labels. Aerospace remains a large employer in the region. And the Valley remains widely recognized leader in the fields of health care, insurance, technology and finance.

The Valley faces many modern challenges, including cohesive transportation, economic development, environmental improvements and neighborhood protection. It must be recognized however that regionwide challenges and issues are best addressed with a unified regional approach. The patchwork of cities and unincorporated areas, and the region's sheer size and increasing complexity will continue to make it difficult to develop a consistent consensus regarding potential solutions.

The San Fernando Valley Almanac is designed in part to aid in the process of developing informed consensus. It will help define what the San Fernando Valley is and support efforts to improve the prosperity, health and well being of its residents.

The almanac is designed to be an evolving document, with both a published version and an interactive research resource on the Internet. By identifying, developing

and maintaining a Valley-wide base of information about the region that crosses political boundaries, we hope to track future progress and improve economic management and community stewardship.

Most importantly, we hope it will illuminate and expand the Valley's substantial, unique and critical role in the wider region. If we have managed that, we have accomplished much.



David Fleming

Chairman

The Cities of the San Fernando Valley

MISSION OF THE ECONOMIC ALLIANCE OF THE SAN FERNANDO VALLEY

The Economic Alliance of the San Fernando Valley has established a partnership among the business community, government, civic leadership, and residents of the region. The Alliance is dedicated to conducting research, maintaining data, facilitating education and sharing information. The goal is to improve the Valley's quality of life, to attract and retain employers in the region, and to support prosperity in the community. This is accomplished through the development and implementation of economic strategies and community initiatives. The Alliance maintains communications with the global economic community, and provides objective support for the development of sound public policies.

Since its founding, the Alliance has developed an unprecedented Valleywide economic strategy. Within its collaborative framework, dozens of business and community organizations have worked together since 1994 to meet the challenges of the San Fernando Valley. Groups have reached a consensus on action steps for meaningful and measurable results. This privately driven project has been made possible through massive volunteer efforts, enormous dedication of private resources, and the cooperation of government and leadership at all levels.

POPULATION OF CITIES AND AREAS

City	Area Size Square Miles	1999 Population
Burbank	17.4	104,641
Calabasas	12.9	17,725
Glendale	30.6	205,474
Los Angeles City - Valley Portion	224.9	1,308,199
San Fernando	2.4	33,439
Hidden Hills	1.6	1,905
Chatsworth Area - Unincorporated*	19.8	960
Tujunga Area - Unincorporated*	25.2	2,129
Universal City - Unincorporated*	0.5	0
West Hills Area - Unincorporated*	10.5	5,888
Total Valley	345.8	1,631,592
Los Angeles City - Total	441.5	3,576,704
Los Angeles County - Total	4083.7	9,217,894



Source: Economic Alliance of the San Fernando Valley

Global Significance of the San Fernando Valley

The San Fernando Valley is, in simple terms, an extremely large metropolitan region possessed of unique media, transportation and culture. With a 1999 population of 1.6 million, the area rivals major U.S. cities, and stands at fifth in population. The Valley has limited amounts of undeveloped property, but nonetheless experiences substantial in fill construction and redevelopment of existing facilities.

Originally burgeoning as a suburban "bedroom" community, the Valley has transformed since 1950 with the establishment of far-flung industrial and commercial centers servicing the growing aerospace, insurance, high-tech, and entertainment industries.

The region's diverse, heavily white-collar job base has made for a comparatively high ratio of skilled professionals, who have great flexibility in choosing where they live and work.

The San Fernando Valley's geography is quite distinct. Ranges of the Santa Monica and Santa Susana mountains encircle a huge, bowl-like area covering 345 square miles. Most of the Valley lies within the city of Los Angeles. Nearly half of L.A.'s area and a third of its population live in communities north of Mulholland Drive, which runs along the ridge of the Santa Monica Mountains, and defines the southern border of the Valley.

In addition to Los Angeles, the Valley includes five other cities and several substantial unincorporated areas --- some extending slightly into neighboring Ventura County. These cities range from Los Angeles County's

third-largest municipality -- Glendale -- to its smallest, most exclusive -- Hidden Hills.

These unincorporated areas include a portion of one that is often thought to be a municipality, Universal City. -- the home of Universal Studios. Universal's property is partially in the City of Los Angeles and also spills into the unincorporated portion of the County. Universal City has no residents, but provides a major portion of the region's entertainment-based business and employment. The Valley

is frequently overshadowed by the strong national and global identity of the City of Los Angeles, as it is with the allure of neighboring Hollywood. The true strengths and assets of the Valley are not widely known.

A Significant Metropolitan Area

Despite the Valley's substantial population and sizable industrial base, it has historically not been well defined or widely recognized for its contributions to the national economy and infrastructure. In part, this is because the region's identity was largely subsumed within the broader national notions of the city of Los Angeles.

With the Valley forming a cluster of interdependent communities, it is best viewed in a more holistic way. To begin with, the Valley's 1.6 million residents would make it the nation's fifth-largest municipality, were it configured by geography. And surprisingly, if it were a state, it would exceed the population of 12 of the existing states.

MAJOR U.S. CITIES COMPARED TO SAN FERNANDO VALLEY POPULATION				
Ranked by 1996 Population				
Rank	City	1990 Population (thousands)	1996 Population (thousands)	Population % Change 1990-1996
1	New York, NY	7323	7381	0.8%
2	Los Angeles, CA	3486	3554	2.0%
3	Chicago, IL	2784	3005	7.9%
4	Houston, TX	1638	1744	6.5%
5	San Fernando Valley	1607	1618	0.7%
6	Philadelphia, PA	1586	1478	-6.8%
7	San Diego, CA	1111	1171	5.4%
8	Phoenix, AZ	984	1159	17.8%
9	San Antonio, TX	959	1068	11.4%
10	Dallas, TX	1009	1063	5.4%
11	Detroit, MI	1028	1000	-2.7%
12	San Jose, CA	782	839	7.3%
13	Indianapolis, IN	731	747	2.2%
14	San Francisco, CA	724	735	1.5%
15	Jacksonville, FL	635	680	7.1%
16	Baltimore, MD	736	675	-8.3%
17	Columbus, OH	633	657	3.8%
18	Memphis, TN	619	597	-3.6%
19	Milwaukee, WI	628	591	-5.9%
20	Boston, MA	574	558	-2.8%

Source: Economic Alliance of the San Fernando Valley, US Census Bureau

POPULATION OF THE SAN FERNANDO VALLEY COMPARED TO 12 STATES IN THE U.S.		
Census, Estimates and Projections - 1997		
State	1997 Population (thousands)	SFV Population Ratio to States
Wyoming	480	338%
Vermont	589	275%
Alaska	609	266%
North Dakota	641	253%
Delaware	732	221%
South Dakota	738	220%
Montana	879	184%
Rhode Island	987	164%
New Hampshire	1,173	138%
Hawaii	1,187	136%
Idaho	1,210	134%
Maine	1,242	130%
San Fernando Valley	1,620	100%

Source: Bureau of the Census, *Statistical Abstract of the US, 1998*, Economic Alliance of the San Fernando Valley



Economic Overview The 1990s was a decade of brutal challenges for the San Fernando Valley's economy. Wrenching changes in some of its key industries, a fast-moving revolution in technology that is still affecting its entertainment stalwarts, and the effects of the 1994 Northridge earthquake all took a bite out of the region's economic well being.

Yet the region has climbed back, in part thanks to a fundamental retooling of its economic superstructure. The entertainment businesses have taken advantage of new opportunities, especially internationally. Overseas markets have turned the films, music and television shows of the Valley's studios into one of the nation's most valuable exports. And studios make more money on the overseas box office of their movie releases than they do at home. The Valley now has a quarter of all the entertainment-related jobs in Los Angeles County, and about a fifth of all the jobs in finance and insurance. Overall, it depends less on cyclical businesses, and has a broader array of job creators than it did a decade ago.

As the economy has improved, real estate vacancy rates have dropped substantially and residential real estate markets seem to have recovered to healthy levels. Taxable retail sales have finally moved past 1990 highs. Some areas haven't completely returned to former health, however, such as the aerospace industry, which has gone through substantial contraction and consolidation both nationally and locally, and now occupies a far less central place in the Valley economy. As well, the number of construction permits issued remains far below levels in the late 1980s, other than a predictable spike in the years following the Northridge earthquake.

The national plunge in unemployment rates is only partially reflected in the Valley, whose cities through 1997 all had rates slightly higher than in 1990. The city of San Fernando in particular



remains challenged, with unemployment rates that consistently remained worse than Valley-, county- and nation-wide averages. And North Los Angeles district bankruptcies reflected a regional and national trend, jumping substantially upward between 1993 and 1997, the most recent years available.



Yet the news overall is promising. The economy's retooling bodes well for the Valley's long-term business stability, which now is less dependent on the vagaries of federal defense spending or interest-rate sensitive industries such as construction and auto manufacturing. At the end of the 1990s, in fact, the region is far more balanced than it was when the decade started. This balance leaves the Valley far better structured to weather the next down cycle in the nation's economy, whenever that may come.





The Midopolis in the Digital Economy

by Joel Kotkin

As it enters the new century, the Valley has become something other than a prototypical suburb. It is now a community caught between a quickly growing, high-tech oriented periphery and the traditional city -- a kind of midopolis -- that blends an increasingly urban reality with a primarily suburban infrastructure.

Like many other midopolitan communities such as the San Gabriel Valley or Long Island outside New York, the Valley now finds itself locked in a competition for jobs and investment with both the old city and the newer suburbs for its place in the evolving information economy. These industries --- spanning a broad range of activities from media and entertainment to telecommunications and computers --- have over the past twenty years doubled its share of the US economy.

Such activity, according to the Milken Institute economist Ross DeVol, now accounts for nearly two-thirds of the differential in economic growth between various regions and most of the nation's growth in productivity. To a large extent, the success of the Valley, like that of most communities, lies in its ability to lure and nurture these industries, and the skilled workers critical to them.

This represents a new kind of challenge to the Valley. In contrast to traditional industries, the information industries are relatively unconstrained by such limitations as access to raw materials, ports, access to markets and skilled or semi-skilled labor. Instead, for these firms and the generally highly educated workers critical to their success, locational choice has more importance. Even government has only a limited role to play: Surveys of high-technology firms find "quality of life" attractive to skilled workers far more important than any of the traditional factors such as taxes, regulation or land costs.

The individuals tied to these industries --- investors, engineers, systems analysts, scientists, creative workers--- are

increasingly what one analyst has called "very sophisticated consumers of place". To them, the world is essentially a vast smorgasbord in which various locales compete for their affections and attention.

In this competition to date, the Valley faces two distinct challenges. On the one side there is the renewed appeal of some older, more urbanized areas, notably Santa Monica and Pasadena, for the rapidly growing Internet and digital imaging industries. Virtually all the key major forces in the region's burgeoning dot.com economy -- Entertainment Media Partners, eCompanies, Digital Coast Partners and idealab! -- are located either on the westside or in Pasadena. Dependent largely on an under-30 workforce, these areas possess a kind of fashionable appeal that the Valley, still widely perceived as classic suburb, does not yet possess.



The other challenge comes primarily for newer, often more planned communities such as Raliegh-Durham, Irvine or, closer to home, Westlake and Thousand Oaks. These communities cannot be described as either "suburbs" in the conventional sense or even as "edge cities" sprawling along the periphery of most major cities. Instead, these

communities are best seen as nerdistans, new urban regions built by their ability to attract the rising technological elite.

Recruitment concerns, not taxes or regulations, drive firms to the nerdistans and out of older midopolitan communities like the Valley says Nancy Tullos, Human Resource Manager at Broadcom, a firm that relocated in the late 1990s from Los Angeles to Irvine. Tullos recalls how on a previous job for Micropolis, a company located in the San Fernando Valley, she was forced to route their visits carefully so they would avoid the Valley's array of unattractive strip malls, decaying barrios and abandoned defense plants. "I used to give them maps to get there so they would not have to come up and see what's on Desoto," she recalls mirthfully.





Playing to Strength: Building the Valley Community

Yet despite these challenges, the Valley enters the new century with considerable strengths, if it can build on them. For one thing, it has a well-developed infrastructure -- freeways, boulevards, industrial parks, and large resident skilled workforce ---that is difficult to duplicate quickly in either the nerdistans or in the inner city. This is particularly true for the critical entertainment complex for which the Valley, with its developed base of soundstages and recording studios, remains the ultimate, and most economically viable, destination. Recent decisions to expand in the Valley by both Dreamworks and Disney reflect the enduring allure of such factors.

The Valley can also take advantage of its increasingly central location. With much growth now taking place on the periphery, the geographic center of gravity in the region is no longer downtown, but in the Valley, which sits conveniently between the two. For companies seeking to cover the LA area -- and tap the region's diverse skill base -- a Valley location can be seen as increasingly efficient, which may be one reason why it ranks second, well ahead of downtown and only slightly behind the westside, as a headquarters for fast-growing firms.

Finally, the Valley remains the one part of Los Angeles that seems best positioned to remain an economically and racially diverse community. Out-of-sight prices have turned the westside largely into an upper-class enclave, with a few exceptions. Gentrification of some more inner city neighborhoods may have the same effect, as already has occurred in other cities such as New York, Chicago, Boston and San Francisco. At the same time, many communities to the north of the Valley, especially Westlake/Thousand Oaks, are becoming increasingly expensive, a trend likely to be accelerated by an intensifying anti-growth movement.

Yet these trends do not mean that the Valley will inevitably secure its niche in the digital age. Ongoing decline in the school system, for example, virtually guarantees the continuing out-migration of middle class families, not only among Anglos but in the increasingly large Latino, African-American and Asian middle class. Without decentralization and radical reform of the Los Angeles Unified School District, in particular, maintaining the historic middle class family atmosphere connected to the Valley may be difficult, if not impossible.

“the geographic center of gravity in the region is no longer downtown, but in the Valley”

Finally, and just as importantly, the Valley must nurture a greater sense of community and common interest. Born largely as the offshoot of another city, the Valley has only recently begun to develop its character as an urban place. One positive step has been the growth of pedestrian-oriented districts --- from largely Latino Van Nuys to middle class Sherman Oaks and Burbank's San Fernando Road to increasingly tony Studio City or Toluca Lake.

Building up these special districts is critical to building a sense of a Valley community. It's unlikely that the Valley will ever be like a traditional centralized city such as a New York or even Los Angeles. It will never possess a single true “downtown”. Instead, its future lies as a city of diverse neighborhoods, each serving its immediate community, yet adding to the diverse mixture of options for the broader constituency of Valley residents.

Another important part of civic renewal can be seen in the burgeoning farmers' markets, ethnic and arts festivals which feed off the Valley's growing ethnic diversity and creative resources. The on-going development of the North Hollywood's NOHO district, including the recent opening of the El Portal theatre, also suggest the possibilities of incubating a Valley arts community, something critical to attracting the kind of young creatives and professionals needed by information age companies.

Although the halcyon days of the Valley as archetypical suburbia are gone forever, this community can still emerge as laboratories for the creation of a new and potentially important archetype of the American future city --- diverse, democratic, family oriented and dynamic. Yet the keys to this future lies not at City Hall, but in the willingness of the citizenry, and the business community, to invest in the lives both of their neighborhoods and the broader Valley community.

Without this kind of grassroots commitment, any attempts to improve the Valley from above --- political or economic --- will be doomed to diminished results. Like any community, the Valley will be only as good as its citizens and their willingness to work together. “People do not live together simply to be together,” wrote the Spanish philosopher Ortega y Gasset. “They live together to do something together.”

For the Valley, the time to “do something together” has now arrived.

Joel Kotkin is a Senior Fellow with the Pepperdine Institute for Public Policy and research fellow in urban studies for the Reason Foundation. He is the author of the forthcoming Repealing Geography: New Rules for Place in the Digital Age to be published next year by Random House. He lives in Sherman Oaks.





Living and Working in the San Fernando Valley

QUALITY OF LIFE

One thing the Valley offers is an enviable quality of life. The numerous cultural and recreational opportunities within its boundaries, are complemented with hundreds more in the broader Southern California region. On the Valley's southeast corner lies Los Angeles' Griffith Park, the nation's largest municipal park and home of the Greek Theater, Traveltown train museum, Los Angeles Zoo, Gene Autry Museum of Western Heritage, Griffith Observatory, Los Angeles Zoo, dozens of hiking and horse trails, a vintage merry-go-round, three 18-hole championship golf courses, deer, bobcats, coyotes and many other indigenous species of animals.

The northeast side of the Valley is covered by the Angeles National Forest, the southwest by the Santa Monica Mountains National Recreation Area and numerous state, county and federal park lands, the northwest by the Santa Susana Mountains and additional county, state and federal park lands. The Sepulveda Basin, a flood-control area of the Los Angeles River, has been turned into a huge recreational space and refuge for both migratory birds and active humans, with playing fields for everything from fast-pitch softball to cricket.

And of course, a few minutes to the southwest are renowned California beaches such as Malibu, Zuma and Santa Monica. An hour's drive to the northeast takes one to the snow-covered ski slopes of Wrightwood and Mount Baldy -- and beyond to Big Bear, Arrowhead, and further north to Mammoth Mountain, June Mountain and Lake Tahoe. Combined with moderate year-round local weather, these facilities invite people to enjoy the outdoors. And when Valley dwellers want to stimulate their mind, they have access to world-class institutions such as the Getty Museum on the southern edge and the Norton Simon Museum in nearby Pasadena. Glendale's refurbished Alex Theater and Canoga Park's restored New Madrid Theater provide attractive local venues for entertainment.

Also to the south in the Cahuenga Pass sits a tremendous entertainment center with Universal Studios Hollywood, Universal Amphitheater and CityWalk. The rides and attractions of Universal Studios Hollywood bring tourists from all over the world. The amphitheater hosts top-name artists, and CityWalk features shopping, restaurants, movie theaters and nightclubs.

Further into the Cahuenga Pass sits another great attraction, the world-famous Hollywood Bowl, where the Playboy Jazz Festival, Los Angeles Philharmonic Orchestra, opera and world music stars all entertain thousands of fans nearly every night during the summer. Across the freeway from the Bowl is another modest treasure, the John Anson Ford Amphitheater, with its own eclectic summerlong array of programming. The Valley's best-known way to spend a lazy afternoon - going to the mall - also gets its due in the region's many mixed use centers, from the Media City Center in Burbank and Glendale Galleria to the conglomeration of malls in Woodland Hills along Topanga Canyon Boulevard. As well, Ventura Boulevard is something of the Valley's Main Street, with miles of eclectic shopping and dining opportunities. There are a wide range of atmospheres from the creative enclaves of Studio City to the dramatic high-end lifestyle spaces of Calabasas.





Balancing Economic and Community Concerns

Much has changed in the last 40 years in the way we view our communities. At the end of the 20th Century, communities are increasingly conscious of the challenge in balancing economic development and increased population with quality-of-life concerns. This is particularly so in the San Fernando Valley, which blossomed after World War II from a few modestly developed neighborhoods into the great suburban tracts whose images have been symbolically etched in people's minds as the vision of the of Southern California lifestyle.

Because Valley communities span eight separate jurisdictions, and strongly impact dozens more, management of suburban sprawl has been particularly challenging. The city of Los Angeles comprises two-thirds of the Valley's area and three-fourths of its population. Thus, a substantial share of regional public policy is set by that city.

But more and more, large regional issues that cross jurisdictional lines are requiring policymakers from various cities and even counties to take regional approaches and to develop regional consensus. Valley leaders are finding it important to engage in regular communication in order to better understand the needs of residents, their goals and the likely regionwide consequences of various civic decisions. Groups such as the Economic Alliance of the San Fernando Valley have been created to ease and encourage that consultation on the balance between economic goals and community concerns.

The Southern California area is one of the most spread out, automobile-oriented regions in the world. Two, three and four-car households are commonplace. Rather than public transportation, Valley residents generally prefer the privacy and convenience of their personal vehicles. They can come and go precisely when they wish -- and they can carry along what they need. For the most part, parking is plentiful and inexpensive when compared to areas such as New York City.

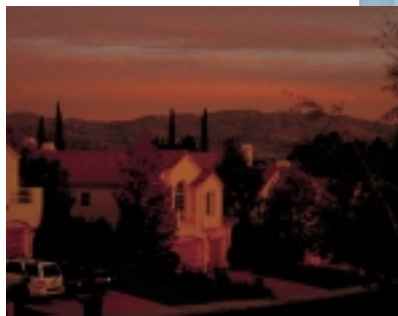
There is a price to be paid, however, and it comes in the form of traffic congestion and prolonged commutes. Of all the environmental challenges, traffic is one of the most difficult to overcome in an area that is essentially "built-out". Great strides have been made in improving air and water quality, and organizations like the Santa Monica Mountains Conservancy have been instrumental in acquiring and protecting open space and parklands.

Yet, even with this concern for the environment, it is still relatively

easy and inexpensive to locate and acquire real estate in desirable areas. As the Valley matures from a suburb, and develops its urban centers, there are increasing opportunities to locate businesses and jobs within livable communities, thus avoiding commutes.

Livable Communities

The importance of maintaining livable communities in the San Fernando Valley cannot be overstated. This is the era of the "corporate citizen," where a company's consideration of community is often the deciding factor in its expansion and development. Corporations are reaching out to the neighborhoods around them in unprecedented ways, making contributions of time and resources. More importantly, entrepreneurs are recogniz-



ing the need to provide leadership and strength for community initiatives.

In part, that's a realization by companies that the quality of life in their community affects their ability to attract quality employees and executives. They recognize the need for diversity in housing opportunities and ready access to culture and entertainment. A superior educational system has been repeatedly identified by corporate decision makers as critical to relocation and expansion decisions, because of the key role a competent and skilled workforce plays in a company's success.

The Valley offers many quality-of-life options, a wide variety of housing, many cultural and recreational opportunities, a robust economy, and a wide array of educational institutions. When coupled with its moderate climate and access to metropolitan resources, these features heighten the Valley's appeal.





A Place in the Sun

Temperature and Precipitation - The San Fernando Valley is situated in one of the most temperate climates in the world. While the Valley experiences a number of summer days that top 100° the average annual maximum temperature is in the high 70s, and even in September, the hottest month, the temperature only averages in the high 80s. The average annual minimum temperature is in the high 40s, with the coldest monthly minimum falling in January at 41.6°. Since this is well above freezing, the Valley has zero average snowfall, in spite of being within minutes of winter recreation areas in the nearby mountains. The Valley is a fertile but naturally arid area with annual rainfall in the range of 5 to 40 inches since 1980.

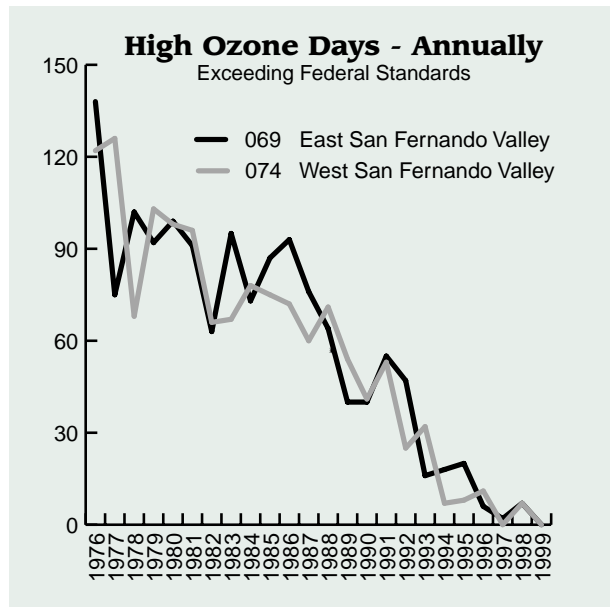
WEATHER IN THE SAN FERNANDO VALLEY AVERAGES - BY MONTH

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Average Max. Temperature (F)	65.9	68.3	70.3	74.7	78.4	84.5	92.1	92.0	88.5	81.1	72.8	66.8	77.9
Average Min. Temperature (F)	41.6	42.8	43.8	46.5	50.6	54.4	58.5	58.9	56.8	51.5	45.8	42.0	49.4
Average Total Precipitation (in.)	3.7	3.8	3.1	1.3	0.3	0.1	0.0	0.1	0.3	0.4	1.9	2.5	17.6
Average Total SnowFall (in.)	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Average Snow Depth (in.)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Western Regional Climate Center, statistics by observation.

The Valley's Weather Southern California is known for some of the world's most consistently moderate weather, with a semi-arid climate of near-desert conditions moderated and somewhat moistened by cooling ocean currents just off the nearby coast. The ring of mountains surrounding the Valley ensure that it will almost always be somewhat warmer, both summer and winter, than areas immediately on the coast. Even within the Valley, there are small but notable differences in average temperature, with the eastern end cooler in the day and warmer at night. But by any standard, the area's climate remains mild, with rainfall levels a third of those on the East Coast, abundant sunshine year-round and a probability that on New Year's Day, residents can take a neighborhood walk in shorts and a T-shirt.

Air Quality There has been substantial improvement in air quality in the San Fernando Valley since 1976. Los Angeles developed a reputation in the late 1940s and early 1950s as being an area with a chronic Smog problem. As late as 1976, the area suffered from air quality challenges during as many as 38% of the days of the year. For the first time since those early days, according to the California Air Resources Board, in 1999 the San Fernando Valley had no days where the Ozone levels exceeded the federal standards.



OZONE - NUMBER OF DAYS EXCEEDING THE FEDERAL STANDARD Federal Standard (12 ppbm, 1-Hour Average)

STN#	LOCATION	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987
069	East San Fernando Valley	138	75	102	92	99	91	63	95	73	87	93	76
074	West San Fernando Valley	122	126	68	103	98	96	66	67	78	75	72	60

STN#	LOCATION	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
069	East San Fernando Valley	64	40	40	55	47	16	18	20	6	2	7	0
074	West San Fernando Valley	71	54	41	53	25	32	7	8	11	0	7	0

Source: California Air Resources Board

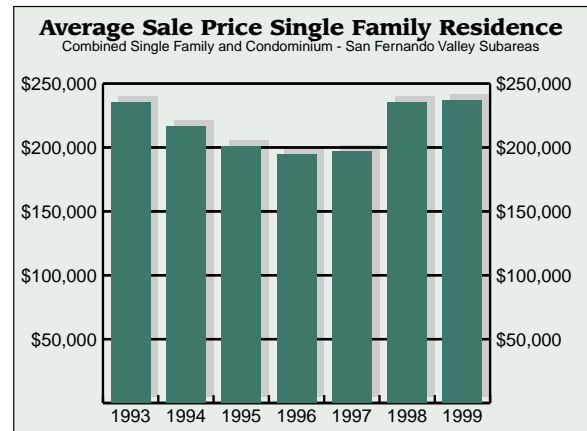
Homes

Residential Real Estate Trends

Southern California growth spawned a construction industry that has, over the last 40 years rippled ever outward to new communities and commercial developments. As early as the 1940s, Valley builders were emerging as pioneers in developing the “American Dream” through the cultivation of suburban housing tracts.

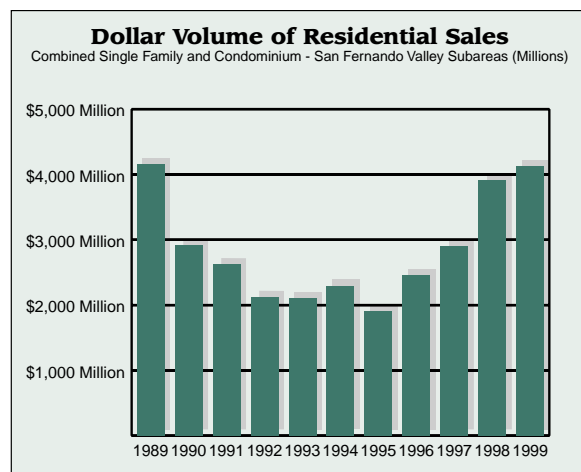
Owing to a strong ongoing demand for housing, residential real estate has become as much a commodity as a necessity in the San Fernando Valley. In the robust market of the late 1980s, it was not uncommon for one family to own multiple houses, or to trade up on an annual basis.

In 1990, market prices took a tumble, and with them went the volume of residential sales. Several corrections took place in 1994-1995, at least in part because of the displacement of the Northridge Earthquake. By



AVERAGE SALE PRICE SINGLE FAMILY RESIDENCE							
Combined Single Family and Condominium - San Fernando Valley Subareas							
	1993	1994	1995	1996	1997	1998	1999*
Total SFV	235,483	216,070	200,617	194,382	197,060	235,214	236,600

Source: Southland Regional Association of Realtors
* Estimates based on October Totals



1999, with a strong national economy and low unemployment, the residential market had completely recovered.

Porter Ranch is the largest and most recent new planned community in the Valley. Situated in the high-demand northwest Valley, on completion the project will provide 3,395 new homes in the range of \$500,000 to \$800,000. It will be served by 6 million square feet of new, high-end commercial and retail including the 53-acre “Porter Ranch Town Center.”

With other new developments including stylish Mulholland Park in Tarzana and high-end Mountain View estates in Calabasas, the Valley is also seen pioneering a new phenomenon known as “million-dollar tract homes”.

DOLLAR VOLUME OF RESIDENTIAL SALES (Millions)											
Combined Single Family and Condominium - San Fernando Valley Subareas											
	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999*
Northeast	563.106	459.48	356.866	270.068	250.484	257.596	225.926	233.801	266.379	353.720	413.812
Southeast	1,173.600	850.09	745.928	558.972	540.404	555.993	447.213	519.172	665.468	996.129	1,104.155
South Central	756.203	490.35	445.265	370.954	348.568	436.362	343.747	525.100	609.573	724.578	667.768
North West	783.033	551.80	516.236	428.963	454.928	447.443	417.161	520.802	597.507	751.707	839.671
South West	880.630	559.36	555.816	490.425	507.909	596.385	469.323	657.181	766.382	1,078.426	1,086.497
Total	4,156.572	2,911.080	2,620.111	2,119.382	2,102.293	2,293.779	1,903.370	2,456.056	2,905.309	3,904.560	4,117.903

Source: Southland Regional Association of Realtors
* Estimates based on October Totals



Business Trends

The Valley in the New Century

by Joel Kotkin

As the new millennium opens, the San Fernando Valley stands at a critical juncture. A product of the great middle class suburban expansion of the post-war era, it has evolved into a complex, increasingly urban, diverse and multi-faceted region. The question is whether those changes can be used to forge a new sense of the community, or whether the area will become a massive digital age suburban slum.

On the economic front, the immediate prospects are fairly good. After the tough days of the early 1990s, the Valley's employment base is surging, commercial vacancy rates are down in the single digits, and property values are once again rising. The Valley's strong and varied industrial base includes the largest concentration of entertainment-related employment in the country. As the need for content grows on the Internet, this could anchor the region in the emerging digital economy.

The Valley also has an increased wealth of human resources. Once primarily Anglo, it has become home to a series of dynamic new ethnic communities, ranging from Vietnamese and Chinese to Mexican, Salvadoran, Iranian and Israeli. This positions the Valley as a potential center of an increasingly integrated world economy.

Yet there is another side to this story. As the Valley has evolved, it has also developed larger pockets of poverty, particularly in its northeast corner; its schools have deteriorated and, although down for now, crime remains a primary worry for a large number of residents. Fractured political leadership, particularly in those parts

controlled by the City of Los Angeles, has resulted in a weak political culture and often a kind of hodge-podge pattern of land use.

Fundamentally, the Valley is both the victim, and the beneficiary, of its own success. First annexed to Los Angeles in 1915, the Valley developed from an agricultural community into a vast bedroom and shopping mall haven for the city's expanding middle class. Its population quintupled between 1944 and 1960. Shopping centers, housing tracks, churches and synagogues rose like flowers after the rain.

But something more than sub-urbanization of farmland was taking place. Like other new suburbs --- such as Northern California's Santa Clara Valley, Northern New Jersey and Fairfax County, Virginia --- the Valley was becoming a major center of technology and information-related industries. Not only was Hollywood moving "over the hill" but newer industries, such as disc-drives and telecommunications, were establishing their primary L.A. beachheads there.



According to analysis by Cal State University Northridge

economist Shirley Svorny, the Valley today still boasts a sizable concentration of manufacturing, ranging from high-technology electronics and garments as well as some of the most important entertainment related clusters of activity, employing over 60,000 people. Like Los Angeles as a whole, what makes the Valley economy run are small, often highly specialized creative-oriented firms that service the region's enormous cultural-industrial complex.

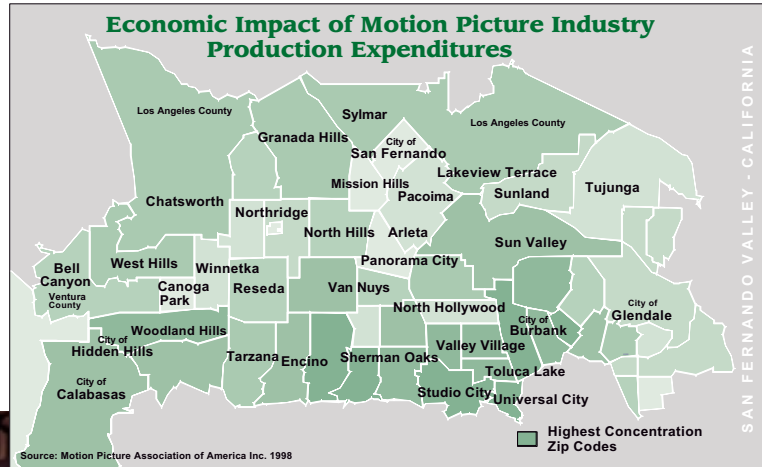
This economic diversity is also evident in an election of retail outlets that rivals that of most

Continued on Page 63



Motion Pictures - Television Entertainment

The Entertainment Industry Generates a major Portion of San Fernando Valley Jobs and Commerce



A 1998 study by the Motion Picture Association of America among its members shows \$6.4 billion in vendor and employee payments being generated in the San Fernando Valley. \$4.2 billion was generated in the L.A. City portion alone. The San Fernando Valley enjoys far more economic benefit from the motion picture industry than most are aware of.

Perhaps the most interesting revelation is the distribution of economic benefits -- over \$1 billion dollars of business is being done in the west San Fernando Valley -- and enormous impacts being shown in virtually every Valley Zip Code.

Burbank leads the subareas with \$1.7 billion in jobs and trade, followed by the Studio City/North Hollywood subarea with \$1.4 billion, Sherman Oaks/Encino/Tarzana with \$862 million, Universal City with \$745 million, Woodland Hills/West Hills with \$321 million, and Chatsworth/Northridge with \$199 million.

As the demand for production space grows, companies have looked to the broader Valley region for accommodations. Between 1992 and 1996, California's motion picture, commercial and television production employment rose 38% to 226,000 -- with a large share going to the San Fernando Valley.

The massive motion picture industry brings wealth into the community, provides jobs, and enhances cultural awareness. The San Fernando Valley is home to virtually all of the major entertainment companies and a large percentage of the talent.

Two dozen or so mega-companies dominate the entertainment landscape and are served by 5,000 smaller niche and specialty companies. These entrepreneurs provide a network of goods and services essential to the creative development of the entertainment community.



Businesses with a Significant Presence in the San Fernando Valley

BUSINESS AND REAL ESTATE

David Bloom

At the turn of the last century, the Valley was comprised mostly of ranches and farms, and dotted with a few small communities such as San Fernando that clustered around railheads. Real estate development, aided by the extension of Henry Huntington's Red Car trolley lines to San Fernando, Van Nuys and Canoga Park, encouraged more residents to move into the area, though it remained largely undeveloped. The region also attracted a number of film production facilities, including one of the first major studios, Universal, to be followed within a few years by Warner Bros. and then Walt Disney.

The region benefited mightily by the nation's huge defense buildup during and after World War II, as aerospace companies such as Lockheed established major aerospace production facilities from Burbank to Chatsworth. The postwar years also saw the rise of a new entertainment medium -- television -- and the arrival of production facilities for that medium led by NBC.

Southern California's general prosperity helped feed a huge population boom in the Valley, with real-estate development and construction becoming a major part of the area's economy. This also helped fuel a rise in insurance companies in the region, especially in the health and auto categories. Several of the nation's largest insurers now are headquartered in the western end of the Valley.

Aerospace is no longer as dominant a portion of the region's economy, but the decrease in defense spending has been replaced by a huge increase in other types of jobs in the computer and technology sector. And the massive worldwide popularity of American movies, music and television has made the Val-

ley's entertainment sector one of the country's most reliable and profitable areas of export. Technology also has spawned new media sectors, including an array of online companies, special effects houses, videogame developers and others. The Valley is also home to a new movie studio founded in the 90s -- Dreamworks SKG. The presence of the major entertainment complexes masks a

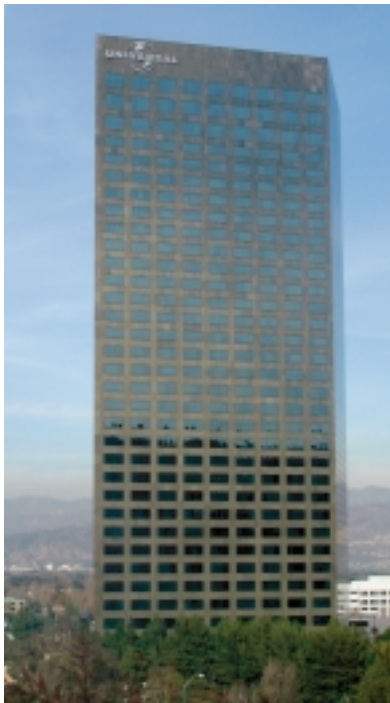


deeper reality, however, because most jobs in the huge Valley-based entertainment sector are actually with companies of fewer than 50 employees. Those thousands of small businesses, many of them created only for the duration of a six-month or year-long project, provide the high-paying opportunities that comprise the heart of the region's flourishing economy.

Even a cursory glance at the Valley's commercial office vacancy rates through most of this decade will quickly tell a story of prosperity recovered. The start of the 1990s, when aerospace industries were shutting down factories and the entertainment and high-tech sectors hadn't yet taken off, were difficult ones in the Valley and throughout Southern California. At the end of the 1990s, however, the picture is substantially different, and nowhere is it more quickly evident than in the plummeting office vacancy rates that are now down to as little as 5.7 percent from highs of as much as 20 percent early in the decade.

Vacancies have actually risen slightly in the east Valley around many of the fast-growing entertainment studios, but that's a factor of the construction of hundreds of thousands of square feet of new office, studio and other space in the region, often done by converting or demolishing abandoned aerospace properties, to ease a serious crunch in available space that hit in the mid-1990s and sent vacancy rates to barely 5.1 percent in that area. And rates there are still the Valley's lowest. Overall, about 2.7 million square feet of space were vacant Valley-wide in 1997, the most recent year available, out of 26.1 million square feet available, for a Valley-wide vacancy rate of 10.2 percent. Chatsworth, at 26 percent, and Panorama City, at over 90 percent, have the highest vacancy rates in the region.

These communities are perceived as being far from the entertainment centers in the Riverside Drive axis of the east Valley, and it may be some time before that sector fully recovers. Nonetheless, Chatsworth's 91311 Zip Code accounted for nearly \$60 million in motion picture vendor and employee payments in 1998, according to the Motion Picture Association of America. Panorama City's small supply of office space is largely out of service, accounting for much of the vacancy there. But they too, enjoyed nearly \$20 million in motion picture revenues for the year. Formerly quake-ravaged Northridge and stuffed-to-the-gills Universal City have the region's





COMPANIES WITH A SIGNIFICANT PRESENCE
IN THE SAN FERNANDO VALLEY

20th Century Industries	Matthew Studio Equipment
ACT Networks Inc.	Medical Resources Mgmt Inc
Air Conditioning Co. Inc.	MiniMed Inc
Align-Rite International	MRV Communications Inc
Amgen	N U Pizza Holding Corp
American Cytogenetics Inc	National Technical Systems, Inc.
Ampersand Corp.	Natrol Inc.
Amwest Insurance Group	NBC Studios
Anheuser - Busch	Netter Digital Entertainment
Applause Enterprises Inc.	Networks Electronic Corp
Apple One Employment Services	North American Scientific
Brilliant Digital Entrtnmnt	Nova Development
Burbank Aeronautical	Nu-Med Inc
Blue Cross of California	OAN Services Inc.
Rocketdyne/Boeing	Ocal Inc
Chad Therapeutics, Inc.	On Assignment Inc.
Cheesecake Factory Inc., The	Optical Comm. Products
Cherokee Group Inc.	OroAmerica Inc.
Cinema Ride Inc	Pacific Crest Capital
COHR INC	Panavision Inc.
Countrywide Credit Industries, Inc.	Perceptronics
Creative Computer Applications	Pico Products Inc
Daily News, Los Angeles	Pinkerton's Inc.
Data Direct Networks	Pioneer Commercial Funding
Datametrics Corp	PMC Global Inc.
Delta Circuits	Pollution Research & Con.
Dcc Compact Classics	Precision Dynamics
Dick Clark Productions	Providence Saint Joseph Medical Center
Dreamworks SKG	PS Business Parks, Inc.
Dycam Inc	Public Storage Inc.
Dynamic Sciences Intl	Puroflow Inc
Easyriders Inc.	Ryland Group
Electronic Clearing House Inc.	Sage Holding Co.
Electro Rent Corp.	SKG Dreamworks
Environmental Industries	Soligen Technologies, Inc.
Film Roman, Inc.	Sound Source Interactive
Flamemaster Corporation	Spa Faucet Inc.
Forest Lawn Memorial Parks	Spatializer Audio Labs Inc
Foundation Health Systems Inc	Summit Care Corporation
Four Media Company	Sunkist Growers Inc.
Frawley Corp	Superior Industries International Inc.
Galpin Motors Inc	Superior National Insurance
General Motors Design	Syncor International Corp.
Glendale Adventist Medical Center	Tekelec
Golden State Bancorp.	THQ Inc.
Guitar Center, Inc.	Trio-Tech International
Haskel International Inc.	Turbodyne Technologies Inc
Hawker Pacific Aerospace	Tutor-Saliba Corp.
Hema Care Corp	Unico American Corp.
Highland Federal Bank	Unilab Corp.
IHOP Corp.	United Golf Products, Inc.
Image Entertainment Inc	Universal Studios
Intellicell Corp.	Vertel Corp
International Remote Imaging	Vitesse Semiconductor
Interscience Computer Corp.	Voice Powered Technology Intl
Irvine Optical Co.	Walt Disney Co.
Iwerks Entertainment	Warner Brothers Studios
Jerry's Famous Deli, Inc.	Washington Mutual Bank
K Swiss Inc.	Weider Health and Fitness Inc.

Zenith National Insurance Corp.

lowest vacancy rates, at less than 1 percent each. Burbank, Glendale and Studio City, all situated along the Riverside Drive entertainment axis, also enjoy low vacancies.

It's much the same story in the industrial sector, where vacancy rates have plummeted to submarket levels as low as 2 percent, from rates that had hit as high as 23.5 percent in the central portion of the Valley. Part of the decline was a result of the elimination of about 2 percent of the more than 99 million square feet of rentable industrial space in the region from 1993 to 1998.

As with commercial space, some of the highest vacancy rates are in the Valley's northwest end, in Chatsworth and Granada Hills, and some of the lowest in Glendale and Burbank. And the trends are the same for the same reasons: the growth of the entertainment and tech sectors, which have been converting industrial space to their own needs.

In many parts of the Valley, industrial space is at a premium, because virtually nothing is available for rent. Despite the tight markets, rents have remained quite affordable, at less than \$2 per square foot in nearly all areas except Burbank and the insurance and finance centers in Woodland Hills.

It's a different story when it comes to residential real estate, however. The Valley provides a wide array of housing, and has been known for decades as a much more affordable alternative to neighborhoods south of Mulholland in Los Angeles and other neighboring cities. The range of opportunities is staggering, from small starter homes and low-cost rentals on the floor of the Valley, to sprawling multi-million dollar hilltop estates.

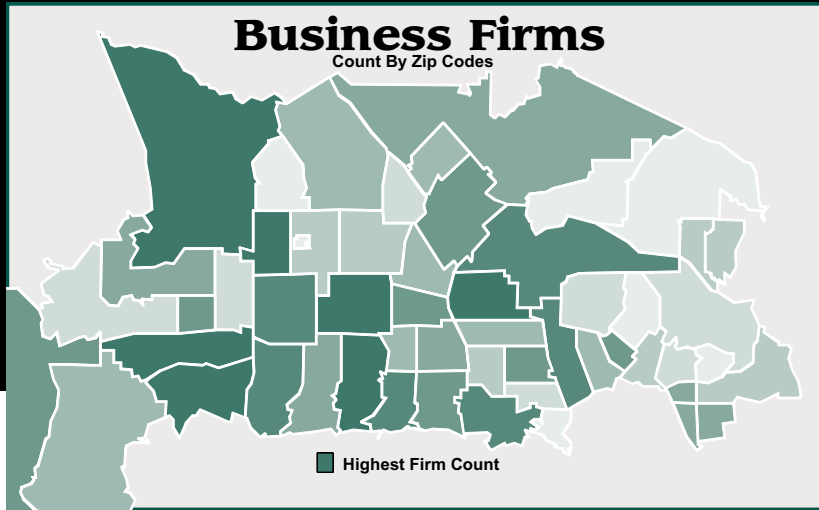
Residential real-estate markets were battered in the wake of the early 1990s economic malaise, but recovered nicely with the rest of the economy, with both the number of residential real-estate listings and the dollar volume in residential sales shooting back up by 1998.

The hottest area, in something of an inversion of the commercial and industrial sectors' trends, has been the Northwest Valley, where large homes with big yards are available at remarkably competitive prices in many neighborhoods. After a big spike in construction permit issuances after the 1994 Northridge earthquake, much of it for repairs, construction activity has returned to something of the baseline levels of much of the 1980s.

Source: Economic Alliance of the San Fernando Valley



Business Clusters



TOTAL NUMBER OF FIRMS

1999 Counts by City/Region

City / Region	Count
1. NY NEW YORK	144,999
2. TX HOUSTON	113,567
3. IL CHICAGO	102,286
4. CA LOS ANGELES	94,550
5. TX DALLAS	65,541
6. CA SAN FERNANDO VALLEY	63,810
7. CA SAN FRANCISCO	52,779
8. PA PHILADELPHIA	52,206
9. TX SAN ANTONIO	46,287
10. CA SAN DIEGO	45,931
11. AZ PHOENIX	42,228
12. DC WASHINGTON	40,377
13. WA SEATTLE	39,638
14. TX AUSTIN	36,229
15. MD BALTIMORE	35,944
16. IN INDIANAPOLIS	33,620
17. OH COLUMBUS	30,534
18. WI MILWAUKEE	28,470
18. TN MEMPHIS	28,210
19. CA SAN JOSE	28,136
20. FL JACKSONVILLE	26,852
21. MI DETROIT	24,075
22. TN NASHVILLE	22,941
23. MA BOSTON	21,156
24. TX EL PASO	18,742

TOTAL NUMBER OF LARGER FIRMS

1999 Counts by City/Region \$10M+ Annual

City / Region	Count
1. NY NEW YORK	21,320
2. IL CHICAGO	14,604
3. TX HOUSTON	12,500
4. CA LOS ANGELES	9,428
5. DC WASHINGTON	8,441
6. TX DALLAS	7,923
7. PA PHILADELPHIA	7,843
8. CA SAN FRANCISCO	5,287
9. MD BALTIMORE	5,205
10. TX SAN ANTONIO	4,781
11. WA SEATTLE	4,705
12. IN INDIANAPOLIS	4,645
13. CA SAN DIEGO	4,563
14. AZ PHOENIX	4,554
15. OH COLUMBUS	4,469
16. CA SAN FERNANDO VALLEY	4,398
17. MI DETROIT	4,312
18. WI MILWAUKEE	3,975
18. TN MEMPHIS	3,937
19. TX AUSTIN	3,843
20. FL JACKSONVILLE	3,399
21. TN NASHVILLE	2,992
22. MA BOSTON	2,923
23. CA SAN JOSE	2,800
24. TX EL PASO	2,010

NO. OF LARGER MANUFACTURING FIRMS

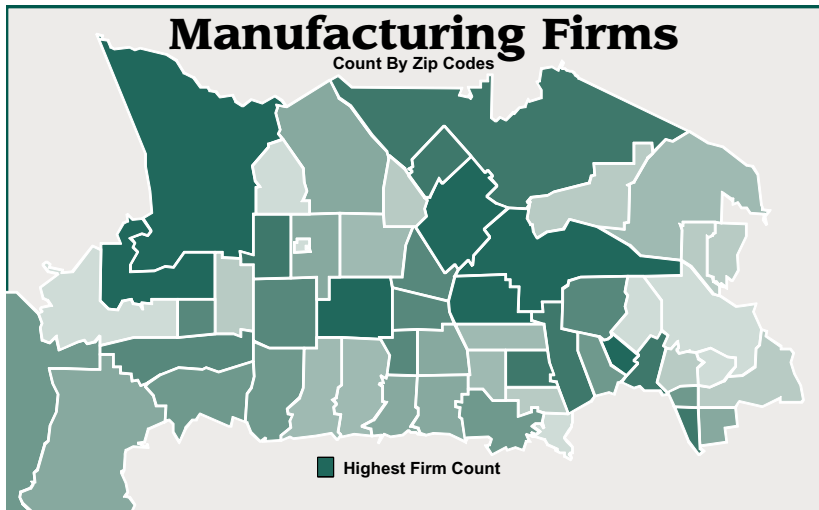
1999 Counts by City/Region \$10M+ Annual

City / Region	Count
1. NY NEW YORK	1,219
2. TX HOUSTON	956
3. IL CHICAGO	934
4. CA LOS ANGELES	713
5. TX DALLAS	552
6. CA SAN FERNANDO VALLEY	426
7. AZ PHOENIX	391
8. WI MILWAUKEE	356
9. CA SAN DIEGO	354
10. IN INDIANAPOLIS	337
11. CA SAN JOSE	322
12. PA PHILADELPHIA	309
13. WA SEATTLE	280
14. MD BALTIMORE	275
15. TN MEMPHIS	263
16. OH COLUMBUS	261
17. TX SAN ANTONIO	234
18. MI DETROIT	212
18. TN NASHVILLE	207
19. FL JACKSONVILLE	198
20. TX AUSTIN	174
21. CA SAN FRANCISCO	169
22. TX EL PASO	151
23. MA BOSTON	85
24. DC WASHINGTON	75

NUMBER OF MANUFACTURING FIRMS

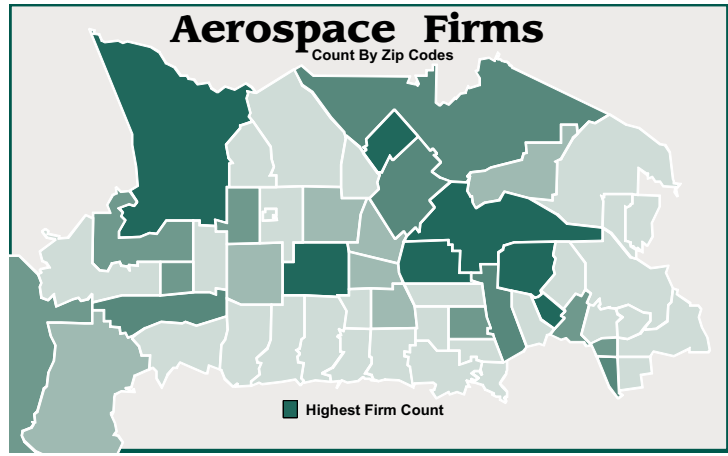
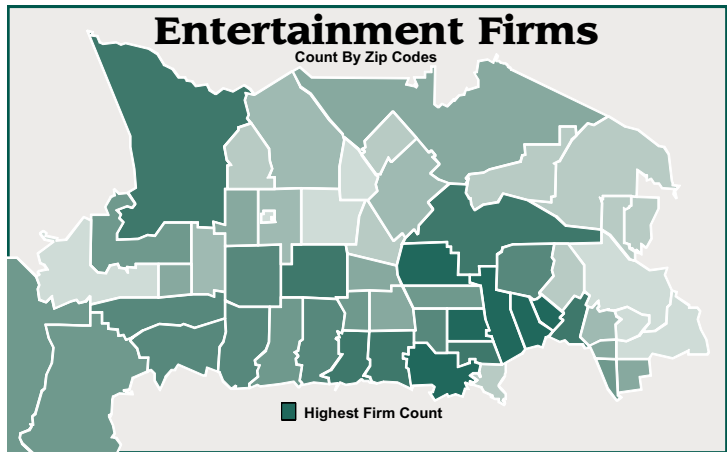
1999 Counts by City/Region

City / Region	Count
1. NY NEW YORK	10,406
2. CA LOS ANGELES	7,945
3. TX HOUSTON	7,768
4. IL CHICAGO	6,430
5. CA SAN FERNANDO VALLEY	4,913
6. TX DALLAS	4,134
7. AZ PHOENIX	3,257
8. CA SAN DIEGO	2,756
9. CA SAN FRANCISCO	2,607
10. WA SEATTLE	2,515
11. PA PHILADELPHIA	2,417
12. IN INDIANAPOLIS	2,279
13. TX SAN ANTONIO	2,274
14. WI MILWAUKEE	2,065
15. CA SAN JOSE	2,053
16. TX AUSTIN	1,866
17. OH COLUMBUS	1,829
18. MD BALTIMORE	1,773
18. TN MEMPHIS	1,763
19. FL JACKSONVILLE	1,636
20. TN NASHVILLE	1,608
21. MI DETROIT	1,596
22. TX EL PASO	1,216
23. DC WASHINGTON	1,037
24. MA BOSTON	636



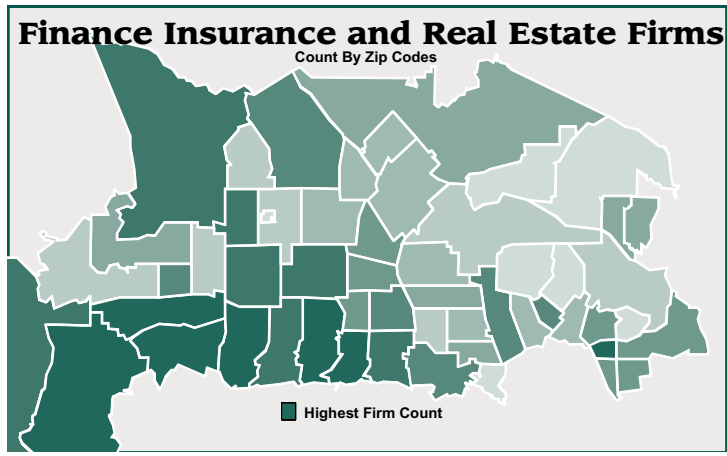


NUMBER OF ENTERTAINMENT FIRMS 1999 Counts by City/Region		NUMBER OF LARGER ENTERTAINMENT FIRMS 1999 Counts by City/Region \$10M+ Annual	
City / Region	Count	City / Region	Count
1. NY NEW YORK	3,509	1. NY NEW YORK	225
2. CA LOS ANGELES	2,365	2. CA LOS ANGELES	160
3. CA SAN FERNANDO VALLEY	1,909	3. CA SAN FERNANDO VALLEY	105
4. IL CHICAGO	1,073	4. IL CHICAGO	52
5. CA SAN FRANCISCO	758	5. TX DALLAS	49
6. TX HOUSTON	711	6. TX HOUSTON	40
7. TX DALLAS	586	7. CA SAN DIEGO	35
8. TN NASHVILLE	571	8. PA PHILADELPHIA	29
9. WA SEATTLE	437	9. CA SAN FRANCISCO	28
10. CA SAN DIEGO	424	10. DC WASHINGTON	28
11. TX AUSTIN	391	11. WI MILWAUKEE	28
12. DC WASHINGTON	373	12. AZ PHOENIX	27
13. PA PHILADELPHIA	317	13. TN NASHVILLE	26
14. TX SAN ANTONIO	314	14. CA SAN JOSE	25
15. AZ PHOENIX	297	15. WA SEATTLE	25
16. WI MILWAUKEE	257	16. TX SAN ANTONIO	23
17. IN INDIANAPOLIS	239	17. IN INDIANAPOLIS	22
18. CA SAN JOSE	232	18. OH COLUMBUS	17
18. OH COLUMBUS	222	18. MD BALTIMORE	16
19. TN MEMPHIS	205	19. TN MEMPHIS	15
20. MD BALTIMORE	197	20. FL JACKSONVILLE	14
21. MA BOSTON	195	21. TX AUSTIN	14
22. FL JACKSONVILLE	193	22. MA BOSTON	11
23. MI DETROIT	144	23. MI DETROIT	8
24. TX EL PASO	105	24. TX EL PASO	8



NUMBER OF AEROSPACE FIRMS 1999 Counts by City/Region		NUMBER OF LARGER AEROSPACE FIRMS 1999 Counts by City/Region \$10M+ Annual	
City / Region	Count	City / Region	Count
1. CA SAN FERNANDO VALLEY	149	1. CA SAN FERNANDO VALLEY	37
2. AZ PHOENIX	94	2. CA SAN DIEGO	26
3. TX SAN ANTONIO	83	3. AZ PHOENIX	22
4. TX DALLAS	63	4. TX HOUSTON	17
5. CA SAN DIEGO	56	5. NY NEW YORK	14
6. TX HOUSTON	53	6. TX DALLAS	13
7. WA SEATTLE	43	7. CA LOS ANGELES	12
8. CA LOS ANGELES	39	8. IN INDIANAPOLIS	8
9. IN INDIANAPOLIS	26	9. WA SEATTLE	8
10. NY NEW YORK	22	10. CA SAN JOSE	7
11. CA SAN JOSE	15	11. TX SAN ANTONIO	7
12. FL JACKSONVILLE	14	12. OH COLUMBUS	5
13. IL CHICAGO	14	13. IL CHICAGO	4
14. PA PHILADELPHIA	14	14. PA PHILADELPHIA	4
15. DC WASHINGTON	12	15. TX AUSTIN	4
16. TX AUSTIN	12	16. FL JACKSONVILLE	3
17. OH COLUMBUS	11	17. MD BALTIMORE	3
18. CA SAN FRANCISCO	10	18. DC WASHINGTON	2
18. TX EL PASO	9	18. MI DETROIT	2
19. MD BALTIMORE	8	19. TN MEMPHIS	2
20. TN MEMPHIS	8	20. WI MILWAUKEE	2
21. TN NASHVILLE	5	21. TN NASHVILLE	1
22. MI DETROIT	4	22. TX EL PASO	1
23. WI MILWAUKEE	4	23. CA SAN FRANCISCO	0
24. MA BOSTON	1	24. MA BOSTON	0

NUMBER OF FINANCE INS & RE FIRMS 1999 Counts by City/Region		NO. OF LARGER FINANCE INS & RE FIRMS 1999 Counts by City/Region \$10M+ Annual	
City / Region	Count	City / Region	Count
1. NY NEW YORK	11,897	1. NY NEW YORK	2,464
2. TX HOUSTON	11,544	2. IL CHICAGO	1,857
3. IL CHICAGO	8,867	3. TX HOUSTON	1,345
4. TX DALLAS	7,453	4. CA LOS ANGELES	994
5. CA LOS ANGELES	6,213	5. TX DALLAS	992
6. CA SAN FERNANDO VALLEY	5,780	6. CA SAN FRANCISCO	773
7. CA SAN DIEGO	4,944	7. CA SAN DIEGO	701
8. TX SAN ANTONIO	4,692	8. CA SAN FERNANDO VALLEY	697
9. AZ PHOENIX	4,551	9. IN INDIANAPOLIS	674
10. TX AUSTIN	4,370	10. PA PHILADELPHIA	661
11. CA SAN FRANCISCO	4,249	11. AZ PHOENIX	623
12. IN INDIANAPOLIS	3,545	12. MD BALTIMORE	568
13. PA PHILADELPHIA	3,308	13. WI MILWAUKEE	523
14. WA SEATTLE	3,239	14. WA SEATTLE	516
15. OH COLUMBUS	3,071	15. TX SAN ANTONIO	515
16. MD BALTIMORE	2,965	16. OH COLUMBUS	507
17. CA SAN JOSE	2,733	17. DC WASHINGTON	489
18. DC WASHINGTON	2,657	18. MA BOSTON	489
18. FL JACKSONVILLE	2,631	18. TX AUSTIN	471
19. TN MEMPHIS	2,575	19. TN MEMPHIS	466
20. WI MILWAUKEE	2,410	20. FL JACKSONVILLE	413
21. TN NASHVILLE	2,198	21. CA SAN JOSE	325
22. MA BOSTON	2,048	22. TN NASHVILLE	325
23. TX EL PASO	1,842	23. MI DETROIT	215
24. MI DETROIT	1,340	24. TX EL PASO	177



Source: Economic Alliance of the San Fernando Valley, ABI/InfoUSA - City of Los Angeles totals include San Fernando Valley portion.



Voices of the Community

In 1999 the Economic Alliance commissioned a study/survey of community attributes and opinions on selected current topics. The Rose Institute at Claremont McKenna College conducted the survey under the direction of Alan Heslop, Ph.D.. The following are excerpts from the results of the survey. One may wish to note the comparisons between fact and perception.

Resident Satisfaction Residents gave generally high marks to the quality of life in the San Fernando Valley, with 73% rating it good to excellent. Only 2% rated it as poor. 79% of respondents rated future prospects as fair to very optimistic. A significant 87% of dwellers planned to remain in the area for at least 5 years, or had not considered moving.

In general, how would you rate the quality of life in your community today?

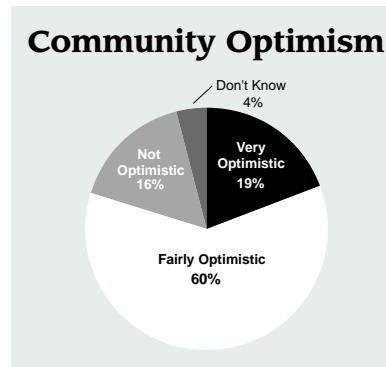
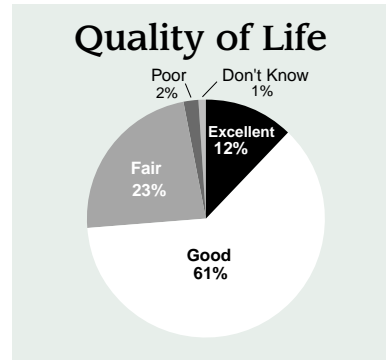
Excellent	Good	Fair	Poor	Don't know
12%	61%	23%	2%	1%

In general, how would you say you feel about the future of your community?

Very optimistic	Fairly optimistic	Not optimistic	Don't know
19%	60%	16%	4%

How long do you intend to live in the San Fernando Valley?

Less than 1 year	1-5 Years	5-10 Years	10-15 Years	More than 15 years	Uncertain
3%	9%	4%	2%	41%	40%



What do you like best about the San Fernando Valley?

Convenient Central Location / Accessibility	20%
Weather / Climate	11%
Quiet / Safe	10%
Family & Friends Live Here / It is Home	7%
Community Living / Neighborhood People	6%
Small Town Suburban Atmosphere	6%
Everything	6%
Other	4%
Nothing	3%
Beauty / Trees, Clean, Parks	3%
Less Congested	2%
Shopping / Stores	2%
Diversity of Culture	2%
Variety of Things to Do	1%
Mountains	1%
Not Much	1%
Schools	1%
Particular Areas	1%
Close to Los Angeles	1%
Nice Area to Raise Kids	1%
Away from Los Angeles	0%
Don't Know / No Response	11%

What do you like least about the San Fernando Valley?

Traffic	18%
Population / Overcrowding	16%
Weather / Heat	14%
Crime / Graffiti	13%
Everything / Other	11%
Air Quality	6%
Cleanliness	4%
No Dislikes	10%
Don't Know	9%

The most prevalent primary reason given for living in the Valley (20%) was proximity to the amenities of the Los Angeles area. This is followed by climate at 11%. Even with the interest in access to metropolitan benefits, 35% of respondents cited levels of peace and quiet, safety, community, and beauty, which are values more typical of suburban life. Not surprisingly, population, traffic and overcrowding lead the group of complaints. This is not uncommon in urban areas where commuting is routine.

Opinion Survey

Technology Penetration The area enjoys a surprisingly high penetration of technology with a full 81% having access to cable or satellite television service. 54% are cellular phone users, and 41% occupy the phone pager category. More than half the people in the Valley have access to the Internet, and nearly 70% have home computers. This indicates a pattern of early adoption of technologies, and also indicates that residents are in a position to understand and enjoy the benefits of new media and technology. Many residents also gain technology access through libraries, schools, rentals and workplaces.

Which of the following devices do you personally own or have available at home?

Cable Television	74%
Computer	67%
Cellular Telephone	54%
Internet Access	53%
Pager	41%
Satellite TV	7%
None	9%

How often do you use the bus?

Often	Seldom	Never
8%	16%	76%

Do you rent or own your home?

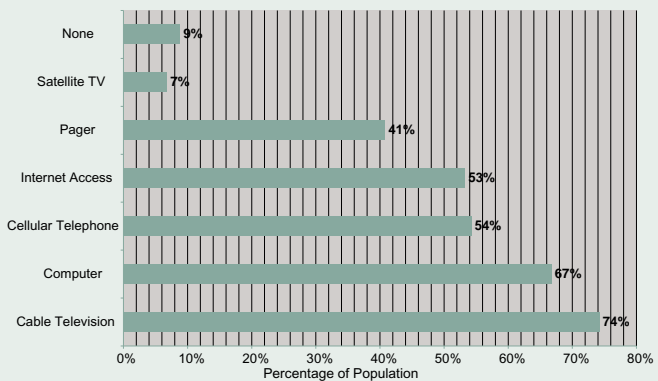
Own	Rent	Other
63%	36%	1%

How old is the home in which you live?

<5 Years	3%
5-10 Yrs	4%
10-20 Yrs	9%
20-30 Yrs	13%
30-40 Yrs	17%
Over 40 Yrs	34%
Don't Know	19%

involvement by renter residents. While capital improvements, enhancements, and ornate landscaping are common to owner-occupied units, they are much less common on rentals, where the goal is to keep maintenance and improvement expenses to a minimum. Very high ratios of renter-occupied units generally indicate increasing disparities in income levels. Much of the housing stock is relatively old in suburban terms, with 51% being over 30 years old. Given the Valley's pioneering role as a suburban model, it follows that the Valley would be one of the first areas to mature. Yet there is significant activity in new subdivisions, and emerging pocket subdivisions where larger lots are being further subdivided and new housing created.

Technology Owned or Available in the Home



Have you done volunteer work for an educational, service or charitable organization in the last 12 months?

Yes	No/Don't know
36%	64%

Civic Engagement 36% of those responding indicated that they had done some form of volunteer work in the preceding 12 months. The Valley has been noted in the past for having a relatively high participation rate in civic and charitable causes. A full 44% also claimed to have contributed in excess of \$100 to charities in the last year.

Housing & Ownership With a 63% owner-occupancy, the Valley would be expected to have a relatively stable civic environment. Often as residents move to the outer suburban rings, earlier housing is converted to rental investment property. This generally translates into shorter tenures and less community

How much did you give to charities in the last year?

\$10 or less	7%
\$10-\$50	4%
\$50-\$100	7%
\$100-\$200	10%
\$200-\$300	6%
\$300-\$400	4%
\$400-\$500	4%
\$500-\$1000	5%
More than \$1000	15%
Don't know	38%

Source: The Rose Institute of State and Local Government, at Claremont McKenna College, 1999



Financial Conditions & Growth 83% of Valley residents indicated that they are financially the same or better off now than they were five years ago. This can be attributed in part to the overall national economic recovery. While raw income statistics may show income erosion in some areas, and widening of income disparities, they generally do not adjust for a mobile population. Industrial growth is recognized as a core component in the development of broad-based community prosperity. 62% were willing to support more industrial development if it creates jobs. Another 14% had no opinion.

Would you support more industrial development for the San Fernando Valley if it creates more jobs?

Yes	No	Don't Know
62%	24%	14%

Do you feel that you and your family are financially better off or worse off today than you were five years ago?

Better off	Same	Worse off	Don't Know
57%	26%	14%	2%

How worried are you about each of these problems in your area of the San Fernando Valley?

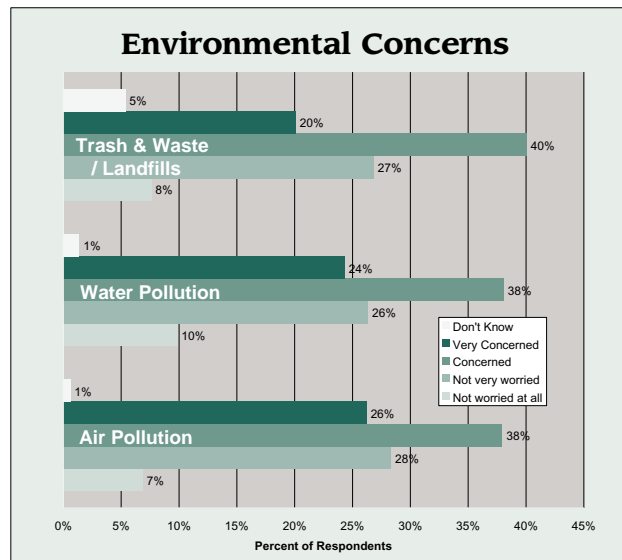
	Not worried at all	Not very worried	Worried	Very Worried	Don't Know
Air Pollution	7%	28%	38%	26%	1%
Water Pollution	10%	26%	38%	24%	1%
Trash & Waste / Landfills	8%	27%	40%	20%	5%

Source: The Rose Institute of State and Local Government, at Claremont McKenna College, 1999

Environmental Concerns Fundamental to quality of life issues are concerns for the quality of the environment, water pollution, air pollution, and solid waste management. Over the last several decades, these issues have taken center stage, to a point where much progress has been made. What once were fringe issues have now become central to consideration of a community's desirability. Employers are more likely to situate in localities that are not environmentally challenged.

The Southern California area has seen great improvement in environmental indicators over the last 50 years. The Valley generally experiences less air and water degradation than the areas to the east and south. Nonetheless, Valley activists are ever-vigilant, and keep the dialogue in the forefront, resulting in ongoing awareness and concern among residents.

Respondents generally preferred to characterize themselves as concerned rather than "very" concerned. A pattern emerges with approximately 35% not very worried or not worried at all, 40% concerned, and approximately 25% very concerned.



Agree or Disagree: Traffic delays on local roads and freeways are getting worse?

Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
46%	44%	6%	0%	2%

Compared to the rest of Los Angeles County, in terms of personal security, would you describe your area and the San Fernando Valley as:

Much Safer	Safer	About the Same	Less Safe	Much Less Safe
16%	48%	27%	6%	1%

Do you think that your community is safer now than it was five years ago?

Yes	No	The same / Don't know
29%	38%	33%



Climate

Detailed Tables

One of the prime attractions of Southern California is the climate. Many parts of the United States are hampered by inclement weather much of the year. With an approximate 16 inches of annual rainfall and no measurable snowfall, the San Fernando Valley is able to function at full capacity virtually 365 days per year. The average minimum temperature for the coolest month, January, ranges from 39 degrees to 67 degrees. The average maximum temperature for the hottest month, September, ranges from 59 degrees to 89 degrees.

Annual Precipitation (inches)		Annual Average Maximum Temperature (Degrees Fahrenheit)		Annual Average Minimum Temperature (Degrees Fahrenheit)				
Burbank	Canoga Park	Burbank	Canoga Park	Burbank	Canoga Park			
1980	30.19	27.3	1980	80.6	80.5	1980	49.1	47.8
1981	14.01	13.65	1981	81.3	81.9	1981	51.8	48.7
1982	17.85	20.47	1982	77.9	78.1	1982	50.4	46.8
1983	39.77	38.48	1983	78.6	80.6	1983	52.1	49.5
1984	9.33	9.55	1984	81.0	84.1	1984	52.4	48.5
1985	6.74	9.23	1985	77.8	82.1	1985	50.8	46.9
1986	16.11	17.57	1986	77.4	82.2	1986	52.7	48.3
1987	12.68	14.55	1987	76.0	81.6	1987	52.2	47.4
1988	12.34	14.89	1988	77.9	82.5	1988	53.1	47.7
1989	4.93	4.63	1989	78.5	83.6	1989	52.8	47.5
1990	7.62	7.04	1990	78.7	83.2	1990	52.9	48.1
1991	16.16	19.59	1991	77.5	80.2	1991	52.9	48.6
1992	33.33	35.23	1992	78.4	81.8	1992	54.5	50.2
1993	29.44	29.41	1993	77.0	81.3	1993	53.5	49.1
1994	10.47	11.04	1994	77.9	80.1	1994	52.2	46.5
1995	29.61	29.3	1995	76.6	80.4	1995	52.7	47.3
1996	17.45	17.36	1996	78.0	83.0	1996	52.5	47.1
1997	12.32	14.01	1997	78.5	81.4	1997	53.4	47.6
1998	32.05	31.04	1998	75.1	77.0	1998	52.1	44.7

WEATHER IN THE SAN FERNANDO VALLEY REGIONAL AVERAGES - BY MONTH

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Average Max. Temperature (F)	65.9	68.3	70.3	74.7	78.4	84.5	92.1	92.0	88.5	81.1	72.8	66.8	77.9
Average Min. Temperature (F)	41.6	42.8	43.8	46.5	50.6	54.4	58.5	58.9	56.8	51.5	45.8	42.0	49.4
Average Total Precipitation (in.)	3.7	3.8	3.1	1.3	0.3	0.1	0.0	0.1	0.3	0.4	1.9	2.5	17.6
Average Total SnowFall (in.)	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Average Snow Depth (in.)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

WEATHER CONDITIONS - AVERAGE BY MONTH BURBANK, VALLEY PUMP PLANT, CALIFORNIA

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Average Max. Temperature (F)	66.8	68.9	70.4	74.1	76.7	81.7	88.8	89.3	87.3	81.0	73.4	67.7	77.2
Average Min. Temperature (F)	41.5	43.7	45.6	49.0	53.3	57.1	60.9	61.2	59.2	53.3	46.1	41.8	51.1
Average Total Precipitation (in.)	3.4	3.7	3.0	1.2	0.3	0.1	0.0	0.1	0.2	0.5	1.7	2.4	16.5
Average Total SnowFall (in.)	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Average Snow Depth (in.)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

WEATHER CONDITIONS - AVERAGE BY MONTH CANOGA PARK, PIERCE COLLEGE, CALIFORNIA

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Average Max. Temperature (F)	67.6	70.1	72.2	77.0	80.7	87.3	94.9	95.3	91.6	84.1	74.8	68.7	80.3
Average Min. Temperature (F)	39.1	40.7	41.8	44.7	48.9	52.9	57.0	57.4	54.6	48.9	42.6	38.8	47.3
Average Total Precipitation (in.)	3.9	3.7	2.9	1.1	0.3	0.0	0.0	0.1	0.2	0.5	1.9	2.4	16.9
Average Total SnowFall (in.)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Average Snow Depth (in.)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

WEATHER CONDITIONS - AVERAGE BY MONTH SAN FERNANDO, CALIFORNIA

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Average Max. Temperature (F)	65.0	67.1	70.5	75.3	78.7	84.3	92.7	92.6	89.6	81.9	73.8	66.4	78.2
Average Min. Temperature (F)	43.2	43.5	44.1	46.7	49.8	52.5	56.3	56.6	54.7	51.1	47.9	45.0	49.3
Average Total Precipitation (in.)	3.5	3.4	2.3	1.4	0.2	0.1	0.0	0.0	0.1	0.4	1.8	2.9	16.2
Average Total SnowFall (in.)	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2
Average Snow Depth (in.)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

WEATHER CONDITIONS - AVERAGE BY MONTH TUJUNGA, CALIFORNIA

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Average Max. Temperature (F)	64.1	67.0	68.0	72.2	77.3	84.6	91.9	90.9	85.3	77.4	69.0	64.2	76.0
Average Min. Temperature (F)	42.6	43.4	43.5	45.4	50.4	54.9	59.7	60.4	58.5	52.7	46.4	42.3	50.0
Average Total Precipitation (in.)	4.1	4.4	4.3	1.5	0.5	0.1	0.0	0.2	0.6	0.4	2.3	2.4	20.8
Average Total SnowFall (in.)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Average Snow Depth (in.)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Western Regional Climate Center, statistics by observation.



Shopping Opportunities Centers

Shopping wasn't invented in the San Fernando Valley, but Valley residents have shown a passion for this pastime. From the early origins of cruising retail thoroughfares such as Van Nuys and Lankershim Boulevards, to more recent notoriety as the home of Moon Zappa's "Valley Girl," the Valley will always be associated with the urban mall as a pop cultural phenomenon. No matter where one lives in the Valley, there is a mall, strip center, or eclectic shopping district nearby.

The dozen or so malls in the Valley range from value-conscious facilities such as the Fallbrook Mall in West Hills, to high-end complexes such as Sherman Oaks Fashion Square. The Sherman Oaks Galleria provided the backdrop for numerous motion pictures and television shows, but changing markets have inspired the owners to demolish most of the old structure, and replace it with a more pedestrian-friendly configuration.

The three largest malls, the Glendale Galleria, Media City Center in Burbank and Northridge Fashion Center, each offer 1.5 million square of shopping.

Some malls have added or expanded the movie theater complexes. Others have begun to replace their outdated symmetrical enclosures with people-friendly meandering open spaces. Most newer centers, typified by the Commons at Calabasas, offer lush landscaping and special amenities such as water features and gazebos.

A 1990s phenomenon in yet another category are the "big box" stores. Large industrial buildings and bulk pricing provide "no frills" shopping for home improvement, electronics, books, office supplies, and general merchandise.

The Valley is home to virtually all of the national chains, as well as several home-grown Southern California operations.



SHOPPING CENTERS IN THE SAN FERNANDO VALLEY Larger Properties

	Street	City
Fallbrook Mall	6633 Fallbrook Ave.	West Hills
Fashion Square, Sherman Oaks	14006 Riverside Dr.	Sherman Oaks
Glendale Galleria	S. Central Ave. and W. Colorado St.	Glendale
Glendale Galleria II	W. Broadway and S. Brand Blvd.	Glendale
Laurel Plaza	6100 Laurel Canyon Blvd.	North Hollywood
Media City Center	201 E. Magnolia Blvd.	Burbank
Northridge Fashion Center	9301 Tampa Ave.	Northridge
Panorama Mall	8401 Van Nuys Blvd.	Panorama City
Promenade at Woodland Hills	6100 Topanga Canyon Blvd.	Woodland Hills
Sherman Oaks Galleria	15301 Ventura Blvd.	Sherman Oaks
Topanga Plaza	6600 Topanga Canyon Blvd.	Canoga Park
Valley Plaza	6601 Victory Blvd.	North Hollywood

SHOPPING CENTERS SERVING THE SAN FERNANDO VALLEY Larger Properties

	Street	City
Antelope Valley Mall	1233 Avenue P	Palmdale
Beverly Center	Beverly Blvd. and N. La Cienega Blvd.	West Hollywood
Camarillo Premium Outlets	740 Ventura Blvd.	Camarillo
Century City Center	10250 Santa Monica Blvd.	Century City
Lancaster Factory Stores	44950 Valley Central Way	Lancaster
Old Town Pasadena	Colorado Blvd. and Fair Oaks Ave.	Pasadena
Santa Monica Place	Colorado Ave. and 2nd St.	Santa Monica
Valencia Town Center	24201 W. Valencia Blvd.	Valencia
Westside Pavillion	Overland Ave. and Ayres Ave.	Los Angeles



Culture History Recreation



MUSEUMS CULTURAL SITES AND POINTS OF INTEREST

San Fernando Valley

Name	Address	City
Andres Pico Adobe	10940 Sepulveda Blvd.	Mission Hills
Angeles National Forest	Angeles Crest Highway	Tujunga
Bolton Hall	10110 Commerce St.	Tujunga
Boys Town of the West - Rancho San Antonio	21000 Plummer St.	Chatsworth
Campo de Cahuenga	3919 Lankershim Blvd.	North Hollywood
Canoga-Owensmouth Historical Society Museum	7248 Owensmouth Ave.	Canoga Park
Casa Adobe De San Rafael	1330 Dorothy Dr.	Glendale
Chatsworth Museum	10835 Shadow Oaks Dr. Chatsworth Park	Chatsworth
Chatsworth Reservoir	Lake Manor Drive and Woolsey Can on Rd.	Chatsworth
Descanso Gardens	1418 Descanso Dr.	La Canada
Gene Autry Western Heritage Museum	4700 Western Heritage Way	Los Angeles
Gordon R. Howard Museum Complex	1015 W. Olive Ave.	Burbank
Homestead Acre and the Hill-Palmer House	10385 Shadow Oak Dr.	Chatsworth
Japanese Garden at the Donald C. Tillman Water Treatment Plant	6100 Woodley Ave.	Encino
Lake Balboa Park (Anthony C. Beilenson)	Sepulveda Basin	Encino
Leonis Adobe	23527 Calabasas Rd.	Calabasas
Lopez Adobe, La Casa de Geronimo	1100 Pico St.	San Fernando
Los Encinos State Historic Park	16756 Moorpark Street	Encino
Mc Groarty Cultural Art Center	7570 Mc Groarty Terrace	Tujunga
Museum Complex	115 N. Lomita St.	Burbank
Natural History Museum of Los Angeles County	555 N. 3rd St.	Burbank
Nethercutt Collection at San Sylmar	15180 Bledsoe St.	Sylmar
Orcutt Ranch Horticultural Center	23600 Roscoe Blvd.	West Hills
Pioneer Church of Chatsworth	22601 Lassen St.	Chatsworth
Plummer House	23537 Calabasas Rd.	Calabasas
Roslin Art Gallery	111 W. California Ave.	Glendale
San Fernando Mission	15151 San Fernando Mission Blvd.	Mission Hills
San Fernando Pioneer Memorial Cemetary	Bledsoe and Foothill	Sylmar
Sepulveda Dam Basin	Burbank Blvd. And Woodley Ave.	Encino
Shadow Ranch House	22633 Vanowen St.	West Hills
Skirball Cultural Center & Museum	2701 N. Sepulveda Blvd.	Los Angeles
Travel Town Transportation Museum	5200 Zoo Dr	Los Angeles
Verdugo Adobe	2211 Bonita Dr.	Glendale

Source: Economic Alliance of the San Fernando Valley

REGIONAL MUSEUMS AND CULTURAL SITES

Significant facilities serving the San Fernando Valley

Name	Address	City
Banning Residence Museum	401 E. M Street	Wilmington
Barnsdall Park	4800 Hollywood Blvd.	Los Angeles
California African-American Museum	600 State Drive, Exposition Park	Los Angeles
California Science Center	700 State Drive, Exposition Park	Los Angeles
Drum Barracks Civil War Museum	1052 Banning Blvd.	Wilmington
Fort MacArthur Military Museum	3601 S. Gaffey St.	San Pedro
Getty Center, The	1200 Getty Center Dr.	Brentwood
Griffith Observatory	2800 East Observatory Road	Los Angeles
Huntington Library, Art Collections & Botanical Gardens	1151 Oxford Rd.	San Marino
Los Angeles County Museum of Art	5905 Wilshire Blvd.	Los Angeles
Los Angeles Maritime Museum	Berth 84, Foot of Sixth St., Port of Los Angeles	San Pedro
Los Angeles Zoo	5333 Zoo Drive	Los Angeles
Museum of Contemporary Art	250 S. Grand	Los Angeles
Museum of Tolerance, Simon Wiesenthal Center	9786 W. Pico Blvd.	Los Angeles
Natural History Museum of Los Angeles County	900 Exposition Blvd.	Los Angeles
Norton Simon Museum of Art	411 W. Colorado Blvd.	Pasadena
Page Museum at the La Brea Tar Pits, The	5801 Wilshire Blvd.	Los Angeles
Petersen Automotive Museum, The	6060 Wilshire Blvd.	Los Angeles
UCLA at Armand Hammer Museum of Art and Cultural Center	10899 Wilshire Blvd.	Los Angeles
UCLA Fowler Museum of Cultural History	506 Hilgard Ave.	Los Angeles
William S. Hart Museum and Park	24151 San Fernando Rd.	Newhall

Source: Economic Alliance of the San Fernando Valley



HISTORIC CULTURAL MONUMENTS

Dedicated by City

Name	Address	City
76 Mature Olive Trees	Lassen St. and Topanga Canyon Blvd.	Chatsworth
Amelia Earhart North Hollywood Regional Library	521 N. Tujunga Ave.	North Hollywood
Andres Pico Adobe	10940 Sepulveda Blvd.	Mission Hills
Bolton Hall	10110 Commerce St.	Tujunga
Campo de Cahuenga	3919 Lankershim Blvd.	North Hollywood
Canoga Mission Gallery	23131 Sherman Way	West Hills
Canoga Railroad Station	21355 Sherman Way	Canoga Park
Chatsworth Community Church	Oakwood Memorial Park 22601 Lassen St.	Chatsworth
Chatsworth Reservoir Kiln Site	Woolsey Canyon Road	Chatsworth
David Familian Chapel of Adat Ari El	5540 Laurel Canyon Blvd.	North Hollywood
Deodar Cedar Trees	White Oak and San Jose St.	Northridge
Department of Water & Powere Building	5106 Lankershim Blvd.	North Hollywood
El Portal Theatre	5265 Lankershim Blvd.	North Hollywood
Faith Bible Church	18531 Gresham St.	North Hills
La Reina Theatre	14626 Ventura Blvd.	Sherman Oaks
Laurelwood Apartments	11833 Laurelwood Drive	North Hollywood
Lederer Residence, Francis	23134 Sherman Way	West Hills
Magnolia (House), The	13242 Magnolia Blvd.	Sherman Oaks
Mc Groarty Cultural Art Center	7570 Mc Groarty Terrace	Tujunga
Minnie H. Palmer Residence	22360 Devonshire St.	Chatsworth
Oakridge & Grounds	18650 Devonshire St.	Northridge
Old Stagecoach Trail	South Chatsworth Park	Chatsworth
Orcutt Ranch, Rancho Sombra del Roble	23555 Justice St.	West Hills
Pepper Trees	Canoga and Ventura	Woodland Hills
San Fernando Mission	15151 San Fernando Mission Blvd.	Mission Hills
Shadow Ranch House	22633 Vanowen St.	West Hills
Site of Pacific Electric Railway Station	16710 Sherman Way	Van Nuys
St. Saviour's Chapel at Harvard School	3700 Coldwater Canyon Ave.	Studio City
Stonehurst Recreation Center Bldg.	99091 Dronfield St.	Sylmar
Stone Point Outcroppings	Topanga Canyon Blvd.	Chatsworth
Tower of Wooden Pallets	15357 Magnolia Blvd.	Van Nuys
Valley Municipal Building	14440 Sylvan St.	Van Nuys
Van Nuys Women's Club Building	15832 Sylvan St.	Van Nuys

Source: Economic Alliance of the San Fernando Valley

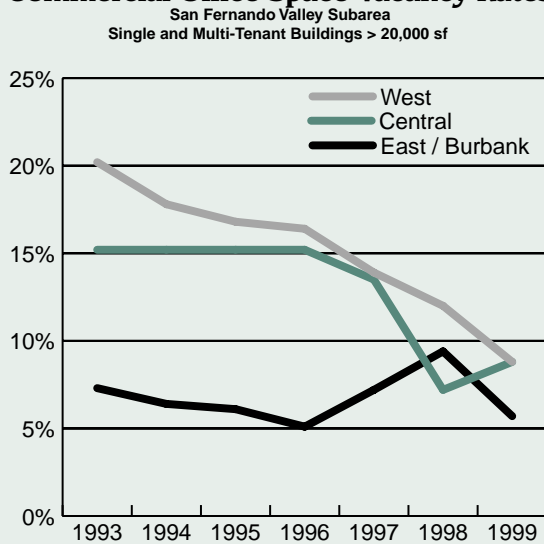
Commercial Real Estate Trends

Office Industrial

The 1990s was a decade of major transition for the San Fernando Valley. The aerospace industry had dominated the Valley's economic landscape since World War II. From 1960 to the fall of the Berlin Wall, the Valley was at the heart of the "Cold War" and the "Space Race" between the United States and the Soviet Union. Aircraft industries clustered around the Burbank area, and nuclear and rocket technologies grew-up in the west San Fernando Valley. Thousands of highly skilled engineers and scientists took up residence in the area. With the departure of aerospace in the late 1980's and early 1990s it would have been expected that the commercial real estate market would



Commercial Office Space Vacancy Rates



have suffered. But diversity played a hand in offering up other industries which have flourished and made full use of the vacated facilities. Even the 1994 Northridge Earthquake was unable to make any long-term impact. With the significant absorption of office space in the east Valley, and the demand of the entertainment industry, the west Valley has seen a steady decline of resources. A large amount of industrial property in the west Valley is being pressed into service as office space, serving as an economical alternative to higher priced Class A office space.

Once the brunt of unrelenting television monologues, "beautiful downtown Burbank" has, along with neighboring Glendale, evolved into a media mecca, attracting a huge influx of creative talent. General Motors, in an effort to capitalize on this creative pool, is establishing its design center in North Hollywood, just minutes from the studios. The company has stated a desire to expose designers to the region's "ethnic, cultural and socio-economic stew." Along with aerospace, design and media-based businesses benefit greatly by clustering and developing pools of specially-skilled employees.

COMMERCIAL OFFICE SPACE VACANCY RATES

San Fernando Valley Subareas
Single and Multi-Tenant Buildings > 20,000 sf

	1993	1994	1995	1996	1997	1998	1999*
East / Burbank	7.3%	6.4%	6.1%	5.1%	7.2%	9.4%	5.7%
Central	15.2%	15.2%	15.2%	15.2%	13.5%	7.2%	8.8%
West	20.2%	17.8%	16.8%	16.4%	13.9%	12.0%	8.8%

Source: Grubb & Ellis, Inc.
*Third Quarter Projection

COMMERCIAL OFFICE SPACE - TOTAL SQ. FT.

San Fernando Valley Subareas
Single and Multi-Tenant Buildings > 20,000 sf

	1993	1994	1995	1996	1997	1998	1999*
East / Burbank	6,205,000	6,101,000	5,811,000	5,856,000	5,856,000	6,260,000	6,474,548
Central	7,870,000	7,366,000	7,087,000	7,240,000	7,240,000	7,202,000	7,493,088
West	7,430,000	7,251,000	7,169,000	7,054,000	7,094,000	7,120,000	7,782,872

Source: Grubb & Ellis, Inc.
*Third Quarter / Projection

"it shifted from a dependence on aerospace to a broader range of job sources"

Industry in Transition What a difference a few years have made for the San Fernando Valley's commercial real estate business. Early in the 1990s, vacancy rates skyrocketed, particularly in the central and west sides of the Valley, as defense spending cuts and a stagnant regional economy walloped first the Valley's industrial base and then the commercial real-estate business.

By 1993, vacancy rates in the West Valley were at 20 percent, with the Central Valley not far behind at about 15 percent. Only the Valley's east end office-space business stayed relatively stable, at 7

percent. The lowest rates remain in tightly-packed Universal City, and post-earthquake Northridge, with vacancy rates of less than 1 percent.

The Valley is one of the more stable subregions in the greater Los Angeles area. There is generally no traceable inward or outward migration of commercial tenants. There have been challenges where companies needed to grow and were unable to find specialized types or sizes of buildings in the area. Some of these problems have been resolved with the establishment of the Economic Alliance

INDUSTRIAL SPACE VACANCY RATES

Single and Multi-Tenant Buildings > 10,000 sf
San Fernando Valley Subareas

	1993	1994	1995	1996	1997	1998	1999*
East	10.0%	13.5%	10.7%	5.2%	3.1%	2.0%	3.8%
Central	23.5%	23.8%	10.1%	9.9%	8.2%	3.3%	6.3%
West	11.4%	13.2%	9.5%	6.7%	6.3%	6.2%	5.2%

Source: Grubb & Ellis Research
* Third Quarter Estimate

INDUSTRIAL SPACE INVENTORY - TOTAL SQ. FT.

Single and Multi-Tenant Buildings > 10,000 sf
San Fernando Valley Subareas

	1993	1994	1995	1996	1997	1998	1999*
East	45,073,000	45,073,000	44,973,000	44,900,000	45,200,000	45,195,000	45,401,363
Central	23,842,000	23,842,000	23,742,000	21,842,000	22,000,000	22,234,000	22,859,865
West	30,198,000	30,098,000	29,698,000	30,198,000	30,225,000	30,442,000	30,294,462

Source: Grubb & Ellis Research
* Third Quarter Estimate

percent. The east Valley benefitted from the huge entertainment studios there, which were beginning to expand their core businesses and moving into new ones such as cable channels, the Internet and computer gaming.

As a result, by the mid-1990s, the East Valley faced a crunch in available space, with vacancy rates dropping to a very tight 5.1 percent. Paradoxically, the space crunch ended up working against the East Valley real estate business, as speculative office and production space were hurriedly put up to fill the need, swelling the amount of available space. As well, some companies began to look to other parts of the region for office and studio space, settling in other parts of the Valley, or in new production space built to the southwest between Torrance and Santa Monica, or to the north, in Santa Clarita.

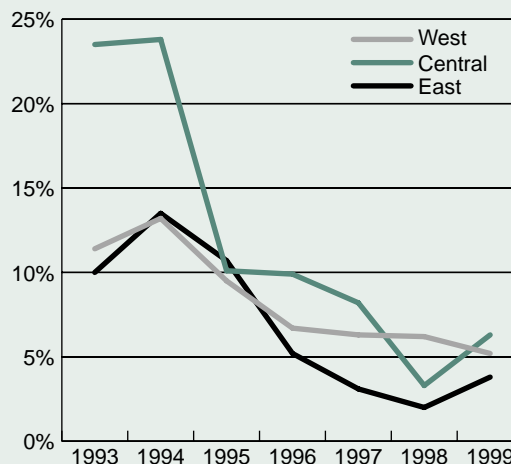
The recovering economy affected the entire spectrum of business particularly in the Central and West Valley areas also, as it shifted from a dependence on aerospace to a broader range of job sources.

Now, the East Valley actually has a higher vacancy rate than does the Central Valley, which saw some of its space destroyed in the Northridge earthquake. Both areas remain at less than 10 percent, which is the Valleywide average. And the West Valley vacancy rate, though still the region's highest, has dropped 40 percent from its 1993 nadir, to 12 percent. Though Chatsworth, at 26 percent, still has easily the area's highest vacancy rate, followed by

and greater emphasis on job generation on the part of the cities. Both Burbank and Glendale have been actively working to create a thoughtful mix of businesses. Calabasas has had a substantial influx of important industries on its western end.

Industrial Property Vacancy Rates

San Fernando Valley Subarea
Single and Multi-Tenant Buildings > 10,000 sf





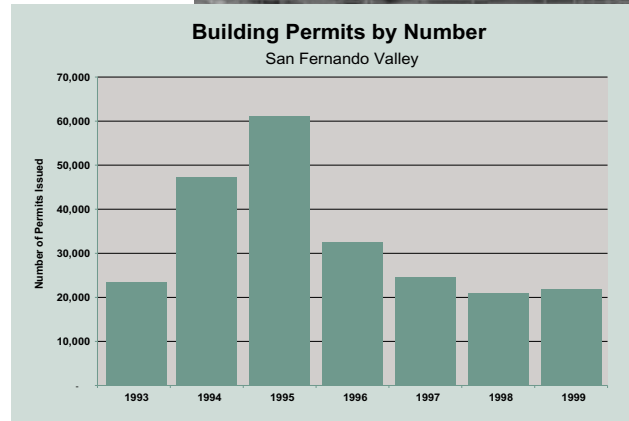
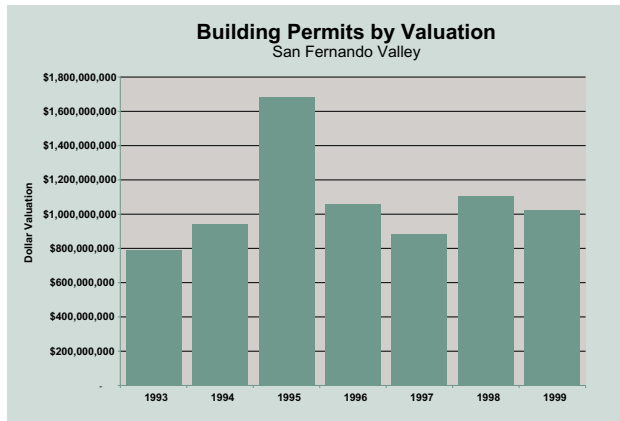
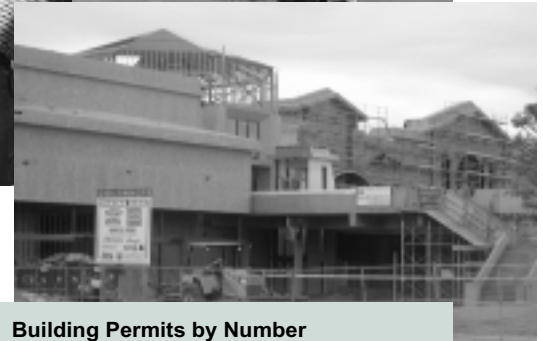
Construction Building Permits

Construction in the San Fernando Valley has been an established industry since the late 1940s. With constant growth in and around the region, there has been sufficient work to keep generations of contractors and tradesmen employed.

If the 1994 Northridge Earthquake had a positive side, it would be the fact that it added over \$500 million in revenues to the Valley's construction industry. Nonetheless, with in-fill construction and redevelopment, the Valley remains strong in the building trades.

Major commercial construction projects begun in Glendale in 1999 account for the city's relatively high average \$64,910 per permit. San Fernando, being built-out and relatively stable, had a nominal average rate per permit.

Valley residents also tend to favor home improvements and remodeling work, including room and garage conversions. This adds to the demand for building permits.



TOTAL VALUATION OF BUILDING PERMITS ISSUED

By City - All Permits

	1993	1994	1995	1996	1997	1998	1999
Calabasas	24,187,142	41,522,182	44,068,976	33,572,655	62,417,425	61,421,701	23,046,721
Burbank	168,233,739	109,616,479	149,802,736	163,282,846	72,607,522	192,457,890	81,363,223
Glendale	71,358,398	75,992,744	81,748,806	103,311,645	125,961,180	175,195,204	154,420,103
Los Angeles - Valley Portion	529,033,877	715,558,524	1,410,277,645	760,933,418	624,343,456	677,104,380	768,098,747
San Fernando	110,477	114,577	141,457	126,026	123,193	106,069	98,378
Total San Fernando Valley	792,923,633	942,804,506	1,686,039,620	1,061,226,590	885,452,776	1,106,285,244	1,027,027,172

NUMBER OF BUILDING PERMITS ISSUED

By City - All Permits

	1993	1994	1995	1996	1997	1998	1999
Calabasas	375	907	790	521	630	665	486
Burbank	2,096	2,770	2,362	2,071	2,197	2,310	2,386
Glendale	2,592	2,736	2,800	2,592	2,292	2,435	2,379
Los Angeles - Valley Portion	18,250	40,235	64,506	6,814	18,974	15,045	15,934
San Fernando	671	581	750	680	608	530	668
Total San Fernando Valley	23,984	47,229	61,208	2,678	24,701	20,985	21,853



Retail Sales



Valleywide, in 1999 estimated household retail expenditures were down a nominal .4 percent over 1998. This was at variance with a countywide increase of 1.6 percent. Burbank had the biggest decline with 7.3 percent and San Fernando the greatest increase at 3.9 percent. Calabasas increased by 1.8 percent, Glendale by .6 percent, and the Los Angeles portion of the Valley decreased by .3 percent.

The 1999 holiday season was an improvement over prior years, and the continued health of the economy is expected to result in sustained increases in retail consumption. Many new pedestrian-oriented shopping districts are being developed and promoted as alternatives to malls and strip centers. The hope is to recover some part of the independent retailer market through these initiatives.

AVERAGE HOUSEHOLD EXPENDITURES BY STORE TYPE - 1999

Business Summary, by SFV Zip Codes

	Average Total HH Expenditures	Avg HH Expend on Restaurants	Avg HH Expend on Liquor	Avg HH Expend on Beauty & Barber	Avg HH Expend on Lawn Care & Mowers	Avg HH Expend on Moving & Storage	Avg HH Expend on Rental Stores	Avg HH Expend on Florists	Avg HH Expend on Homes
Burbank	33,920	1,852	86	260	111	132	35	53	2,574
Calabasas Area	60,155	2,977	150	426	266	164	66	104	5,586
Glendale	42,801	2,234	106	332	154	153	44	67	3,402
Los Angeles - Valley	44,810	2,319	111	336	171	147	47	72	3,753
San Fernando	42,957	2,178	90	315	140	138	43	60	3,514
S.F. Valley Totals	44,001	2,283	109	331	166	147	46	70	3,649
Los Angeles County	43,486	2,236	104	334	159	142	45	67	3,569

	Avg HH Expend on Laundry & Cleaners	Avg HH Expend on Jewelry	Avg HH Expend on Home Audio & Video	Avg HH Expend on Pet Shops & Vets	Avg HH Expend on Auto & Repair	Avg HH Expend on Health & Health Ins	Avg HH Expend on Accounting & Legal	Avg HH Expend on Catering	Avg HH Expend on Travel
Burbank	158	160	476	175	3,906	2,401	257	59	1,404
Calabasas Area	223	304	810	324	7,548	4,441	426	139	2,714
Glendale	187	195	573	209	4,941	3,168	319	81	1,789
Los Angeles - Valley	184	208	614	229	5,342	3,275	324	88	1,880
San Fernando	159	166	614	208	4,790	2,967	264	64	1,488
S.F. Valley Totals	183	204	602	224	5,214	3,214	320	85	1,845
Los Angeles County	184	195	594	211	5,046	3,126	308	80	1,775

Source: Economic Alliance of the San Fernando Valley, Claritas

RETAIL BUSINESS ESTABLISHMENT COUNTS - 1999

Business Summary - Retail Establishment Counts by SFV Zip Code

City	SIC 52 Bldg Mat Garden Mobile Homes	SIC 53 General Merchandise Stores	SIC 54 Food Stores	SIC 55 Auto Dirs Gas Stns	SIC 56 Apparel and Acc Stores	SIC 57 Home Furniture Furnish Equip	SIC 58 Restaurants Eating Drinking	SIC 59 Retail Miscellaneous
Burbank	48	6	91	117	82	151	258	331
Calabasas Area	18	-	38	35	22	74	91	123
Glendale	45	16	191	146	180	272	340	477
Los Angeles - Valley	470	114	999	1,188	983	1,602	2,278	2,763
San Fernando	9	9	40	35	44	38	64	65
S.F. Valley Totals	590	145	1,359	1,521	1,311	2,137	3,031	3,759
Los Angeles County	2,702	1,062	8,478	7,221	8,317	10,164	17,276	20,539

Source: Economic Alliance of the San Fernando Valley, Claritas

Employment

Tracking with other aspects of the Valley's economic structure, unemployment is highest in the north and central east portion of the Valley. Burbank and Glendale have some of the most dramatic intracity contrasts. San Fernando has the highest overall unemployment, and Calabasas the lowest, in the 3 1/2% to 4% range.

After a mid-decade spike in unemployment that hit almost 13 percent in San Fernando (compared to a high of nearly seven percent in Burbank), unemployment rates have dropped to levels similar to those of 1990.

The region's two biggest job sectors are retail trade and durable goods manufacturing, but the Valley comprises only about a sixth of the workers in each of those fields countywide. Overall, the Valley has about 850,000 of the county's 4.3 million employee/jobs, or about 20 percent.

A clear correlation can be seen when the concentration patterns of high school non-graduates is viewed with the patterns of unemployment, service sector, and lower-skill jobs. Similarly, the pattern of college completions and degrees tracks well when compared to professional, technical and executive occupations.

Employment figures do not accurately measure self-employed individuals and independent contractors. According to the 1990 census, the Valley has one of the highest concentrations of self-employed individuals in the area. This is significant when realizing that Southern California is one of the major global regions for entrepreneurs and start-up ventures.

The relative stability of the employment base is remarkable, considering the transition of workforce demand over the last 10 years from aerospace to entertainment, multimedia and finance.

EMPLOYMENT STATUS - 1999 - CLARITAS ESTIMATES

1999 Estimates based on 1990 Census Data, by SFV Zip Codes

	Pop 16+ In Labor Force Employed	Pop 16+ in Labor Force Unemployed	Unemployment Rate of Labor Force	Persons in Labor Force	Pop 16+ Not in Labor Force	Pop 16+ in Armed Forces
Burbank	55,481	3,089	5.3%	58,618	26,350	48
Calabasas Area	24,830	900	3.5%	25,746	10,067	16
Glendale	100,415	7,124	6.6%	107,665	57,447	126
Los Angeles - Valley	671,113	44,221	6.2%	715,993	284,932	659
San Fernando	13,554	1,404	9.4%	14,970	7,332	12
S.F. Valley Totals	865,393	56,738	6.1%	922,992	386,128	861
Los Angeles County	4,487,526	346,308	7.1%	4,846,427	2,342,442	12,593

Source: Economic Alliance of the San Fernando Valley, Claritas

LABOR FORCE STATUS - 1999 - UNITED WAY ESTIMATES

By San Fernando Valley Zip Codes and Communities

City	Persons Employed	Persons Unemployed	Unemployment Rate %	Persons in Labor Force	Persons Not in Labor Force	Total Persons Eligible
Burbank	53,297	2,696	5.7%	55,993	28,489	84,482
Calabasas Area	22,914	889	4.1%	23,803	22,114	45,917
Glendale	97,862	6,619	6.7%	104,483	55,599	160,081
Los Angeles - Valley	669,436	41,785	6.2%	711,225	270,129	981,352
San Fernando	14,660	1,492	9.9%	16,152	6,445	22,596
S.F. Valley Totals	858,169	53,481	6.2%	911,656	382,776	1,294,428
County of Los Angeles	4,331,605	326,488	7.0%	4,658,093	2,295,540	6,953,633

Source: Economic Alliance of the San Fernando Valley, United Way estimate adjusts 1990 Census labor force data for zip codes to 1998 Los Angeles County labor force rates from U.S. Bureau of Labor Statistics

WORKPLACE POPULATION BY SECTOR - 1999

Estimates, Workplace Population, by SFV Zip Codes

	Private Sector	Public Sector	Employed at Home	Military
Burbank	86,133	13,540	1,394	52
Calabasas Area	26,309	4,772	1,616	60
Glendale	79,054	7,809	2,411	36
Los Angeles - Valley	478,502	27,921	20,730	984
San Fernando	12,586	1,969	104	38
S.F. Valley Totals	682,584	56,011	26,255	1,170
Los Angeles County	3,721,240	609,473	111,660	6,923

Source: Economic Alliance of the San Fernando Valley, Claritas

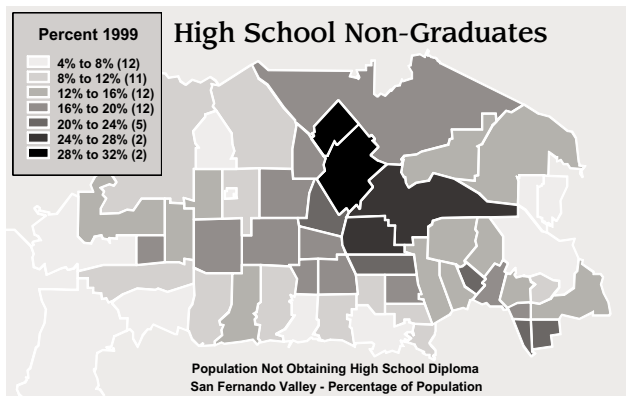
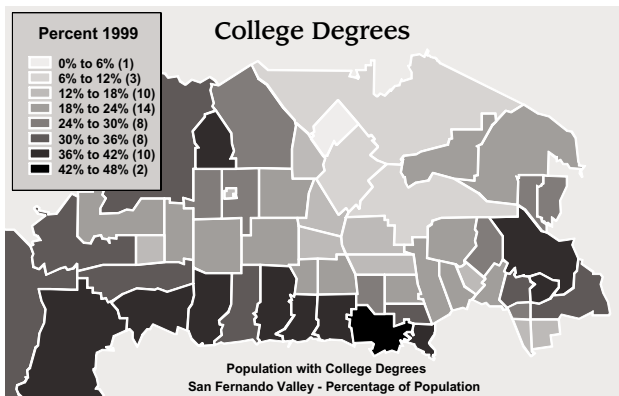
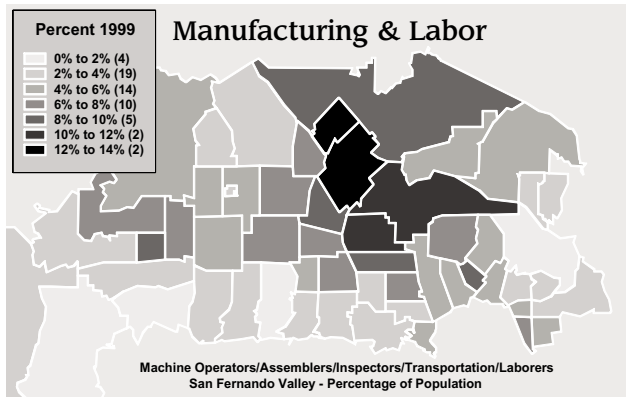
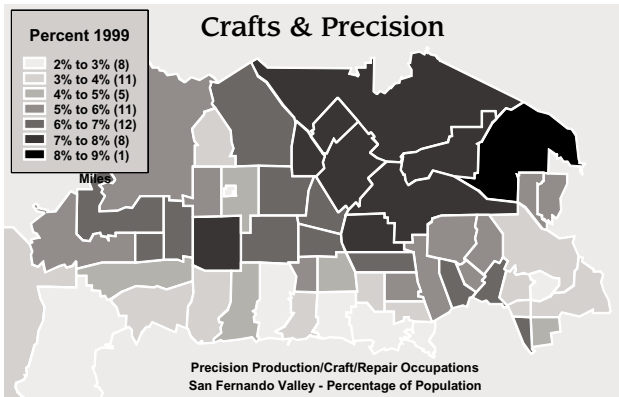
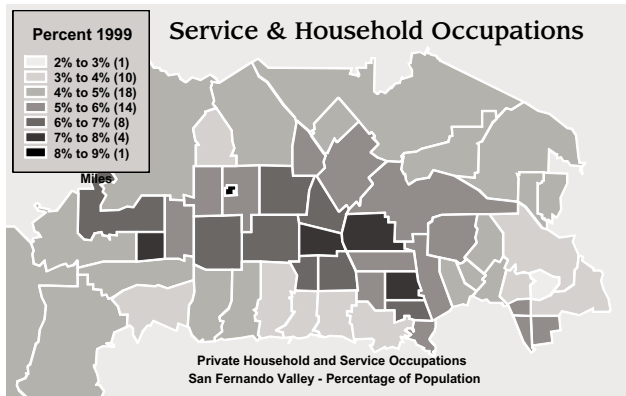
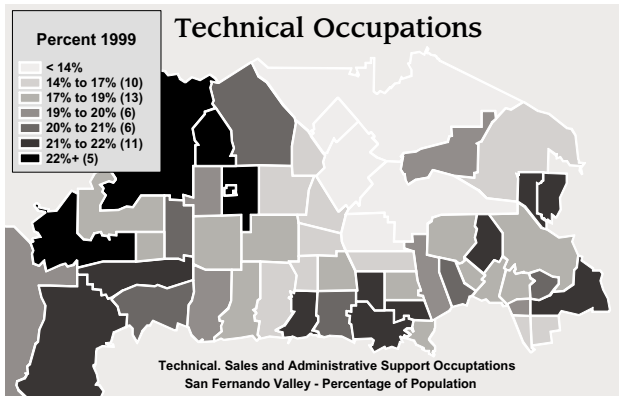
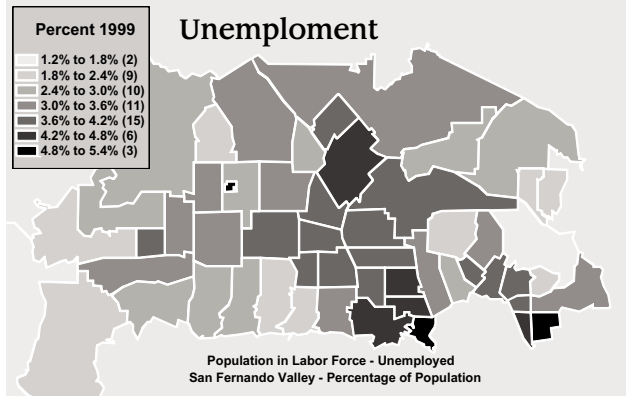
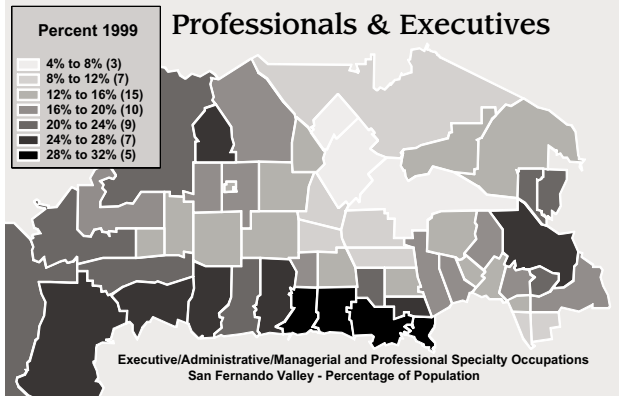
WORKPLACE EMPLOYMENT BY INDUSTRY - 1999

Estimates, Workplace Population, by SFV Zip Codes

	Agriculture Forest Fish Mining Construction	Manufacturing	Transportation Communication Public Utilities	Wholesale Trade	Retail Trade
Burbank	2,146	12,250	4,229	4,237	9,131
Calabasas Area	1,991	3,760	834	1,350	4,387
Glendale	4,277	13,875	2,631	4,042	14,870
Los Angeles - Valley	25,712	85,377	17,374	38,361	86,456
San Fernando	795	3,643	346	1,861	2,021
S.F. Valley Totals	34,921	118,905	25,414	49,851	116,865
Los Angeles County	170,039	695,577	231,615	290,563	642,509

	Finance Insurance Real Estate	Business & Repair Services Personal Svcs	Entertainment & Recreation Services	Professional & Related Health Services	Professional & Related Educ. Services Other Svcs
Burbank	2,645	10,915	31,854	5,239	3,487
Calabasas Area	3,353	5,961	1,316	862	2,495
Glendale	8,560	9,809	2,970	10,128	7,892
Los Angeles - Valley	39,252	65,039	22,374	52,125	46,432
San Fernando	314	1,653	184	869	900
S.F. Valley Totals	54,124	93,377	58,698	69,223	61,206
Los Angeles County	227,878	475,602	228,237	343,215	416,005

Source: Economic Alliance of the San Fernando Valley, Claritas





Institutions

Serving the San Fernando Valley

Colleges and Universities

There are many highly-accessible public colleges and universities situated in and around the San Fernando Valley. Together they serve over 80,000 students and confer degrees in almost all imaginable subject areas. In addition to these there is a large selection of world-class institutions and specialty schools.

The California Institute of Technology and its Jet Propulsion Laboratory represent unparalleled standards in the physical sciences. In view of the area's massive concentration of technical firms, these facilities play a vital role in supporting the necessary pool of scientists, engineers, and technology workers.



California Institute of the Arts provides artists, composers, animators and other special skills to the entertainment and creative community of Hollywood, and to the many studios and production facilities located in the Valley.

The entertainment industry is also served by the American Film Institute, and the television, film and production schools at the University of Southern California and University of California at Los Angeles.

The San Fernando Valley business community is able to draw upon two of the finest universities in America, the University of Southern California, recently ranked by Time Magazine and the Princeton Review as the college of the year, and Cal Tech, recently named the number one university in America by US News and World Report.



USC and UCLA also have substantial law schools and medical schools, providing the area with a ready supply of critical professionals and healthcare workers.

California State University, Northridge (CSUN) is located in the northwest Valley and is a member of the 20-campus California State University system. It is one of the largest institutions of higher learning in California. It is the third-largest college or university in Los Angeles County, after UCLA and CSU Long Beach. It was founded in 1956 as a campus of Los Angeles State College and was separated from its parent college July 1, 1958 to become

San Fernando Valley State College. On June 1, 1972, the college was renamed California State University, Northridge, by action of the California State Legislature and the Board of Trustees of The California State University.

Glendale Community College was founded as Glendale Junior College in 1927 to serve the needs of the people in the Glendale Union High School District. The Valley also hosts three of the nine community colleges of the Los Angeles Community College District, the largest district in the world -- Los Angeles Pierce College, Los Angeles Mission College, and Los Angeles Valley College. Since their founding Pierce and Valley have developed sound academic records and are among the top-ranked colleges in transferring students to UCLA, UC Irvine, USC, Pepperdine University, and CSUN.



The Valley is also dotted with an array of smaller private schools as well as several superb research and educational institutions including Pepperdine University, in Malibu, and the Claremont Colleges in Claremont.

In addition to its colleges and universities, the San Fernando Valley supports two hundred seventy-five private secondary and primary schools and almost a third of the students in the nation's second largest public school district. The Los Angeles Unified School District (LAUSD), as with the City of Los Angeles, serves the largest portion of the Valley, including all of Los Angeles and San Fernando as well as nearby unincorporated areas. The massive district, the nation's second largest, has been undergoing long-running and often controversial reform efforts as it explores charter schools, magnet programs and other initiatives to improve local control and enhance educational opportunities for its students. The Valley also has several smaller, well regarded school districts -- Las Virgenes serving Calabasas, Glendale Unified and Burbank Unified.

Residents of the Valley display a sometimes passionate concern for the quality of education. Over the last twenty years there have been various movements to organize a separate school district in order to give parents more access to school officials and more control over decision making.





Valley high schools also manifest a strong commitment in the number of advanced placement exams given and the variety of subjects tested. North Hollywood High School is perennially the top school in the district accompanied by six other Valley schools that ranked in the top 10 of the LAUSD and in the top 100 schools nationally. North Hollywood and Harvard-Westlake High School, a private campus in Studio City, ranked among the nation's top 50 in the number of students who took advanced placement exams.

Advanced placement exams are one of the primary indicators of solid college-preparatory course work, and reflect an attitude towards excellence in both public and private schools.

One of the serious challenges Valley schools face is a burgeoning school enrollment. The problem is compounded by the success of a recent California initiative which mandates a reduction in class size to 20 students in the 1st and 2nd grades.

While this initiative is seen as a meaningful commitment to improving education, it has also served to strain the already crowded resources of Valley school sites. Private schools are also feeling the pinch, as fewer facilities are available to lease from the public school districts.

Cultural Institutions

Located in the heart of a sprawling metropolitan region of 16 million people, the Valley benefits from easy access to numerous world-class cultural and recreational institutions located in the greater Valley area. Just beyond the Valley's southern edge stands



Jet Propulsion Laboratory, Pasadena, California

the famed J. Paul Getty Museum at the Getty Center, which opened in 1998 and offers a sparkling, billion-dollar marble home to globally significant art and photography. Nearby is the Skirball Cultural Center, Jewish museum and resource center. In Los Angeles' Fairfax district is the Museum of Tolerance, dedicated to preventing genocide and encouraging understanding between people.

Close to the Museum of Tolerance is the Museum Mile on Wilshire Boulevard. There, Los Angeles County operates several well-regarded cultural facilities, beginning with the County Museum of Art, the Petersen

Automotive Museum and the Page Museum, home to thousands of fossilized prehistoric animals pulled from the nearby La Brea Tar Pits.

The Page and Petersen are part of the county's Natural History Museum, whose main facility is in Exposition Park, across from USC and next to the state-run California Science Center museum complex. The Natural History Museum in downtown Los Angeles, the Museum of Contemporary Art and its nearby satellite, the Geffen Contemporary, regularly display the best of post-World War II art from around the world.

MOCA's neighbors include the Colburn School for the Performing Arts and the Music Center's Dorothy Chandler Pavilion which is home to the Los Angeles Philharmonic

Orchestra and the Los Angeles Opera Company. The Philharmonic will soon be moving across the street to Disney Hall, with its remarkable Frank Gehry design.



In nearby Pasadena, the Norton Simon Museum enjoys a reputation as one of the world's best small art museums. Not far away, in San Marino, is another collection, the Huntington Library, with its beautiful gardens, Gainesborough's

"Blue Boy," and Gutenberg Bible.

The region also has several specialized cultural facilities, such as the Children's Museum in downtown Los Angeles, Descanso Gardens, the Autry Museum of Western Heritage and Travel Town Museum in Griffith Park; the Museum of Jurassic Technology in Culver City; Museum of Television and Radio in Beverly Hills and Hollywood Entertainment Museum on Hollywood Boulevard.

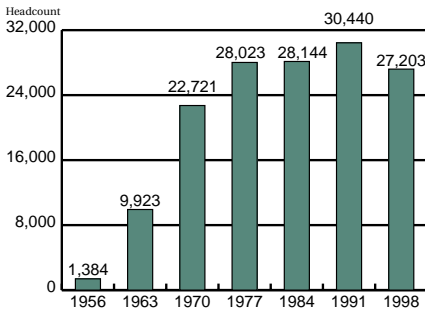


Cal State University Northridge

Enrollment Characteristics

Fall 1998 Enrollment
 Headcount: 27,203
 FTES: 19,841

Total Fall Enrollment 1956-1998



Academic Level	FTES	Headcount	Percent
Freshman	3,740.0	4,252	15.6%
Sophomore	2,037.1	2,399	8.8%
Junior	4,881.3	6,270	23.0%
Senior	6,134.2	8,034	29.5%
Undergraduate	16,792.7	20,955	77.0%
Graduate	3,048.7	6,248	23.0%

Gender	FTES	Headcount	Percent
Men	8,050.5	10,931	40.2%
Women	11,790.9	16,272	59.8%

Undergraduate	FTES	Headcount	Percent
Men	7,137.9	8,989	42.9%
Women	9,654.8	11,966	57.1%
Lower Division	5,777.1	6,651	31.7%
Upper Division	11,015.5	14,304	68.3%

Full-Time:	FTES	Headcount	Percent
Men	5,986.3	6,579	42.3%
Women	8,210.5	8,986	57.7%
Part-Time:	2,595.8	5,390	32.7%
Men	1,151.5	2,410	44.7%
Women	1,444.3	2,980	55.3%

Graduates	FTES	Headcount	Percent
Men	912.6	1,942	31.1%
Women	2,136.1	4,306	68.9%

Full-Time:	FTES	Headcount	Percent
Men	452.4	598	28.0%
Women	1,173.3	1,535	72.0%
Part-Time:	1,422.9	4,115	32.7%
Men	460.2	1,344	32.7%
Women	962.7	2,771	67.3%

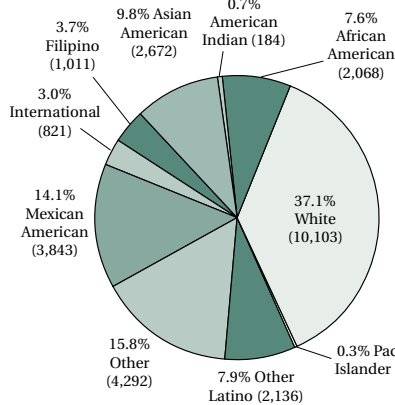
Total Student Enrollment by College

College	Headcount	Percent
Arts, Media, Communications	2,816	10.4%
Business Admin & Economics	5,290	19.4%
Health & Human Development	3,268	12.0%
Education	1,179	4.3%
Engineering & Computer Sci	1,887	6.9%
Humanities	2,715	10.0%
Science & Mathematics	1,726	6.3%
Social & Behavioral Sciences	3,463	12.7%
Undeclared/Special	4,859	17.9%

Note: Full time attendance is based on 12 units or more for undergraduates and 9 units or more for graduates.

Average Age	Value
Undergraduate	24.4
Graduate	34.4
All Students	26.7

Total Student Ethnicity



Majors Fall 1998

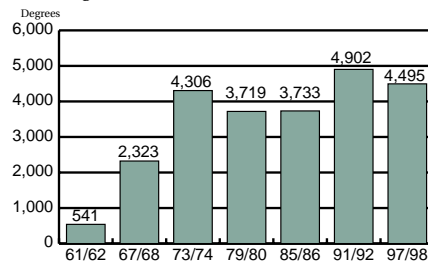
Major	Headcount	Percent
Undergraduate		
Liberal Studies	1,621	8.4%
Business & Management	1,345	7.0%
General Psychology	1,329	6.9%
Accounting	1,148	6.0%
General Biology	999	5.2%
Health Science	888	4.6%
Sociology	769	4.0%
Child Development	762	4.0%
Computer Science	681	3.5%
Other	9,705	50.4%
Graduate		
Counseling	321	10.2%
Business & Management	298	9.5%
Special Education	257	8.2%
English	151	4.8%
Electrical Engineering	124	3.9%
Administration & Supervision	122	3.9%
Computer Science	103	3.3%
Communication Disorders	99	3.1%
Biology	86	2.7%
Other	1,583	50.3%

Note: Majors based on hegis codes; percentages based on total declared.

Degrees Conferred 1997/98

Degree	Headcount	Percent
Bachelor's	3,783	84.2%
Master's	712	15.8%
Total Degrees	4,495	

Total Degrees 1961/62 to 1997/98



Source: Enrollment Reporting System - Degree (ERSD).

Faculty & Staff Fall 1998

	Headcount	Percent
Full-Time	1,131	66.0%
Part-Time	582	34.0%
Total Staff	1,713	
Full-Time	830	53.1%
Part-Time	734	46.9%
Total Faculty	1,564	

Full-Time Faculty Ethnicity

Ethnicity	Headcount	Percent
African American	37	4.5%
American Indian	4	0.5%
Asian American	79	9.5%
Latino	57	6.9%
White, Non-Latino	650	78.3%
Other	2	0.2%

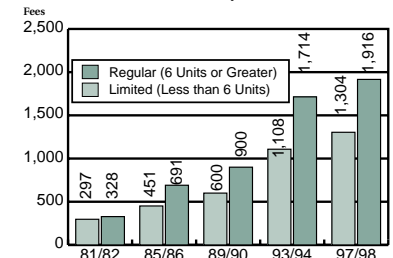
Full-Time Faculty by Rank

Rank	Headcount	Percent
Professor	546	65.8%
Associate Professor	133	16.0%
Assistant Professor	145	17.5%
Instructor/Other	8	1.0%

Note: Part-time staff excludes student assistants, TAs and GAs.
 Source: Faculty Database, Faculty Affairs.

Tuition & Financial Aid 97/98

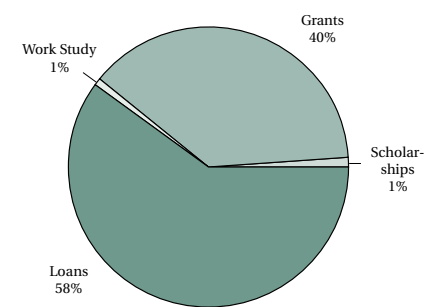
Resident Tuition & Fee History



1997/98 Tuition & Fees for Full-Time Students

Resident	\$1,916
Non-Resident	\$7,874

Financial Aid Awards 1997/98



Award Type	Number	Amount
Loans	12,857	\$50,014,060
Grants	23,595	\$34,330,993
Scholarships	1,148	\$1,168,860
Federal Work Study	736	\$1,002,204
Other Assistance	-	\$1,026,053
Unduplicated Total	15,029	\$87,542,170

Note: Work Study data are estimated.
 Source: Financial Aid Office Annual Report.

Prepared by: Cal State University Northridge, Institutional Research



Community College Glendale

GLENDALE COMMUNITY COLLEGE ENROLLMENT
Credit & Non-Credit - Fall 1991-Fall 1997

	Fall 1991	Fall 1992	Fall 1993	Fall 1994	Fall 1995	Fall 1996	Fall 1997
Credit Enrollment							
Full-Time	2,277	2,525	3,359	4,166	4,196	4,282	4,237
Part-Time	12,943	12,619	11,138	9,990	9,401	9,747	9,756
Credit Enrollment Total	15,220	15,144	14,497	14,156	13,597	14,029	13,993
Non-Credit Enrollment	7,657	7,148	7,061	6,276	5,817	6,560	7,305
Total Enrollment	22,877	22,292	21,558	20,432	19,414	20,589	21,298

Source: Glendale Community College, Campus Profile 1994, 1996, 1997, 1998.

Glendale Community College was founded in 1927 to serve the needs of the people in the Glendale Union High School District, which included La Crescenta, Glendale, and Tujunga. The school was founded as Glendale Junior College and from 1927 to 1929 conducted classes in the buildings of Glendale Union High School at Broadway and Verdugo in the City of Glendale. In 1929, the junior college moved to the Harvard School plant of the Glendale Union High School District where it remained until 1937. In this year a new plant, part of the present one, was completed and occupied.

The year before, in 1936, the Glendale Junior College District was dissolved as such and became a part of the new Glendale Unified School district. The name of the school was changed to Glendale College in 1944. On July 1, 1970, Glendale College became a part of the Glendale Junior College District. On April 20, 1971, the Board of Education adopted a resolution changing the District name to Glendale Community College District.

On November 3, 1980, Glendale voters approved a measure to establish separate Boards. In April 1981, the new members were added to the Board. The separation resulted in the creation of a Board of Trustees solely responsible for the governance of the Glendale Community College District. In 1936, twenty-five acres were acquired for the present site of the college. The campus now consists of 100 acres and 15 permanent buildings. It is beautifully located on the slopes of the San Rafael Mountains overlooking the Valleys in the Glendale area.

Glendale Community College has a college-credit enrollment of about 15,000 day and evening students, and approximately 10,000 others are reached through the adult education pro-gram, specialized job training programs such as JTPA and GAIN, and contract instruction administered by the Professional Development Center. Glendale Community College prepares students for successful transfer to four-year colleges and universities or for successful placement or advancement in rewarding careers. Among its primary functions supporting these objectives are Associate in Arts/Associate in Science, education for meeting the lower division requirements of a university or a four-year college, and education beyond the high school level for vocational competence and/or occupational certification.



Degree & Certificate Programs

Accounting	Electronics and Computer Technology
Administration of Justice	Automation Systems Technician
Advertising Art	Computer Systems Technician
Alcohol/Drug Studies Specialist	Electronics Engineering Technician
Architectural Drafting and Design	Electronics and Computer Technology
Art	Computer Repair Technician
Art History	Electronics Technician—Apprentice
Aviation and Transportation	English
Aviation Administration	Escrow
Flight Attendant	Fashion Design Merchandising
FAA Powerplant License	Fire Technology
FAA Powerplant and Airframe License	Foreign Language
Pilot Training	Health Science
Biological Science	Hotel/Restaurant Management
Bookkeeping	Interdisciplinary Humanities
Business Administration	International Business Specialist
General Business Option	Machine and Manufacturing Technology
Small Business Option	Machinist Option
Financial Planning and Investment Option	Manufacturing Technician Option
International Business Option	Management
Business Office Technology	Manufacturing Engineering
Administrative Assistant Option	Marketing
Executive Secretary Option	Marketing Specialist
Legal Secretary Option	Mass Communications
Secretary Option	Mathematics
General Office Option	Media/Communications
Ceramics	Medical Administrative Services
Child Development	Medical Secretary
Teacher	Medical Front Office
Infant/Toddler Teacher	Medical Transcription
School-Age Care Teacher	Music
Master Teacher	Nursing
Site Supervisor	Photography
Choreographic Studies and Dance Technique	Physical Education
Clerical Trainee	Physical Science
Computer Aided Manufacturing	Real Estate
Computer Information Systems	Recreation Leadership
Computer Numerical Control Technician	Small Business Specialist
Computer Operator	Social Science
Computer Programmer	Speech/Communication
Computer Science	Television Production
Computer Software Technician	Corporate Television Option
Computer Support Technician	Mass Media Option
Cosmetology	Videography Option
Culinary Arts	Theatre Arts
Desktop Publishing	Theatre Arts—General Certificate
Desktop Publishing Technician	Visual Arts
Dietary Service Supervisor	Web Publishing Specialist
Drafting/Electro-Mechanical Design	Welding, Occupational
Electro/Mechanical Fabrication Technician	



Community Colleges Los Angeles

Three of the nine Los Angeles Community Colleges are situated in the San Fernando Valley. The Los Angeles Community College District is the largest system of two-year higher education in the United States. The colleges offer transfer and occupational programs that are open to anyone who is a high school graduate, or at least 18 years of age and able to profit from instruction.

Los Angeles Pierce College is set on 420 acres in the southwest San Fernando Valley, and covers the largest area of any community college in California. Founded in the late 1940s, Pierce's original focus was on the rich Valley agriculture that was so abundant at the time. The college has grown into one of the top institutions in California in transferring students to UCLA, U.C. Irvine, USC, Pepperdine University, CSUN, and other prestigious public and private universities.

Pierce College's open and natural setting is unique among other colleges and universities in Southern California. The College, because of its size and rural setting, is itself often a location for the shooting of films and commercials.

Los Angeles Valley College was officially chartered in June of 1949, and has grown with the Valley. It has an excellent transfer program and a number of solid vocational programs. The college's current enrollment exceeds 17,000 students with a faculty of 234 full time and 292 part time instructors. LAVC continues to offer a number of recreational and cultural opportunities to the community.

Los Angeles Valley College offers transfer, vocational, general, transitional, and adult education programs in an atmosphere that fosters the free and respectful exchange of ideas.

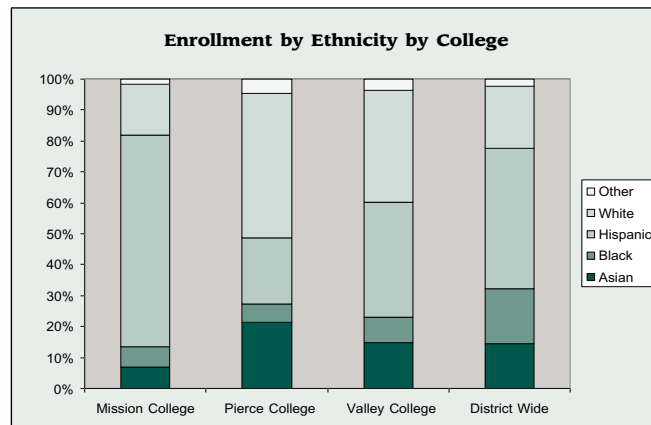


CREDIT ENROLLMENT
LOS ANGELES COMMUNITY COLLEGES
1964-1998

	Mission	Pierce	Valley	District*
1964	---	9,420	13,723	68,030
1965	---	11,139	15,000	74,165
1966	---	12,207	15,983	79,480
1967	---	12,636	16,258	82,156
1968	---	14,128	18,042	88,212
1969	---	14,617	17,028	91,469
1970	---	16,000	18,481	97,176
1971	---	16,317	19,066	102,256
1972	---	16,743	17,457	103,456
1973	---	17,335	18,609	108,922
1974	---	21,206	21,323	124,839
1975	2,000	23,798	24,167	137,031
1976	2,390	22,185	21,405	126,143
1977	3,060	22,654	21,796	129,296
1978	2,678	21,700	21,412	124,523
1979	3,025	22,852	22,055	130,896
1980	3,233	23,072	22,470	134,622
1981	4,023	23,770	22,671	139,168
1982	4,589	23,721	22,358	135,644
1983	3,855	21,260	20,084	119,569
1984	3,353	19,286	17,973	102,313
1985	3,419	17,393	16,284	93,026
1986	4,926	18,513	18,190	103,336
1987	5,150	18,316	18,149	102,912
1988	4,878	18,415	17,924	105,678
1989	5,714	18,038	18,519	108,880
1990	5,767	18,522	17,934	111,485
1991	7,272	19,201	19,279	117,994
1992	7,423	18,584	18,874	116,251
1993	6,097	15,695	16,638	102,800
1994	5,826	14,618	16,233	101,378
1995	5,502	14,192	15,450	98,104
1996	6,226	14,066	15,531	99,358
1997	6,399	14,523	16,001	103,251
1998	6,478	13,078	15,540	98,728

Source: Enrollment and Attendance Reports, 1964 - 1982, and Computer Report CCAF130, 1983 - 98.

*District totals include ITV.



FALL TRANSFERS TO PUBLIC & PRIVATE INSTITUTIONS

Total Known Transfers

	Mission	Pierce	Valley	District Wide
1978	51	997	870	4,125
1980	59	898	772	3,760
1985	35	820	553	2,740
1990	59	792	638	3,097
1991	61	779	548	2,842
1992	78	745	573	2,645
1993	93	748	568	2,622
1994	95	671	559	2,652
1995	126	804	635	3,090
1996	121	720	621	2,866

Source: Reports from California Postsecondary Education Commission (CPEC), Sacramento, 1978-1995.

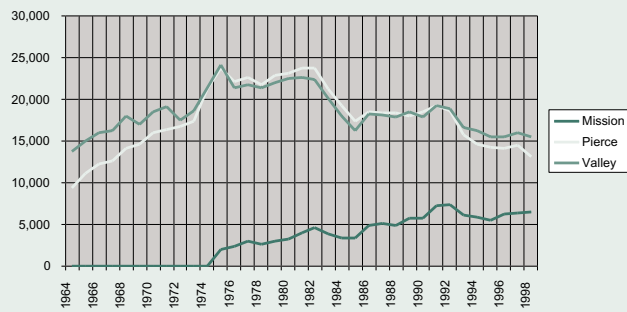
Los Angeles Mission College is the newest campus in the Valley, having begun in 1975. Mission College brings a much needed center and educational resource to the northeast Valley -- an area with identifiable economic disparities. LAMC provides academic, vocational, and occupational training.

For the college to stay current, it has formed partnerships with local industry to get insight into future trends, emerging technologies, potential internships and job placement opportunities for our students.

Los Angeles Mission College is one of the most technological campuses in the state. The Library/Learning Resources Center houses over 350 computers, with the latest programs, Internet access and e-mail.



Credit Enrollment - Los Angeles Community Colleges



GRADE DISTRIBUTION BY COLLEGE

Fall 1981 - Fall 1998 - % of Successful Completers

	Mission	Pierce	Valley	District Wide
Percent "A" Grades				
1981	24.3	20.9	20.9	19.1
1986	23.1	20.5	21.5	20.0
1990	22.8	21.3	22.5	20.4
1993	22.4	23.4	25.1	21.6
1994	22.3	22.6	24.8	21.1
1995	23.0	23.8	25.3	22.1
1996	23.3	25.3	25.8	22.7
1997	23.7	25.6	25.3	22.6
1998	24.3	26.9	26.1	24.2
Percent "B" Grades				
1981	16.6	21.1	18.6	19.3
1986	16.9	20.7	19.5	20.2
1990	16.8	20.9	19.3	19.6
1993	17.4	22.2	19.9	19.9
1994	16.6	21.1	19.1	19.5
1995	19.0	21.1	19.7	19.9
1996	18.0	21.0	19.2	19.2
1997	17.4	21.3	18.6	18.9
1998	17.9	21.4	18.8	18.9
Percent "C" Grades				
1981	11.4	19.7	16.0	17.9
1986	13.2	21.0	16.9	19.3
1990	11.5	19.1	17.1	17.6
1993	14.0	18.6	16.8	18.0
1994	12.9	18.5	15.8	17.2
1995	15.1	18.4	16.0	17.2
1996	12.7	17.1	15.1	16.3
1997	13.1	16.7	15.3	15.8
1998	13.8	17.8	14.8	16.2
Percent "D" Grades				
1981	3.3	5.3	3.9	5.1
1986	3.2	6.2	4.4	5.7
1990	3.4	5.5	4.7	5.2
1993	3.6	5.4	4.5	5.1
1994	4.0	5.8	4.4	5.1
1995	4.6	5.4	4.6	4.9
1996	4.7	5.2	4.5	4.9
1997	4.7	5.0	4.2	4.8
1998	4.9	5.6	4.2	4.8
Percent Other				
1981	44.4	33.0	40.6	38.6
1986	43.7	31.7	37.7	34.8
1990	45.6	33.2	36.5	37.3
1993	42.6	30.4	33.6	35.3
1994	44.2	31.9	35.8	37.1
1995	38.3	31.3	34.3	35.9
1996	41.4	31.4	35.4	37.0
1997	41.1	31.5	36.6	37.9
1998	39.0	28.4	36.0	35.9

Source: Data Processing Report D5120, Grade Distribution by Department.



Universities Colleges Institutes

Regional Facilities Serving the San Fernando Valley

University of California Los Angeles

is situated ten minutes to the south of the San Fernando Valley, and provides Valley residents with a world-class general education university. The UCLA Bruins' are number one on the NCAA list of sports teams with 77 championships.

Undergraduate Programs include: Life Sciences, Physical Sciences, Social Sciences, Arts and Architecture, Education and Information Studies, Engineering and Applied Science, Nursing, Public Policy and Social Research, Theater, Film and Television.

Graduate Division Programs and Schools include: Anderson School of Management, Education and Information Studies, Arts and Architecture, Engineering and Applied Science, UCLA Law School, Policy and Social Research, Theater, Film and Television, The UCLA Center for the Health Sciences, Dentistry, Medicine, Nursing, Public Health, Humanities, Life Sciences, Physical Sciences, and Social Sciences.

University of Southern California

Established in 1880 in what is now University Park, USC has developed into an international center of learning, enrolling more than 28,000 undergraduate, graduate, and professional students on two campuses. It ranks in the top 10 among private research universities in the United States in federal research and voluntary support, and is one of four private research universities in the west elected to the Association of American Universities, a group representing the top one percent of the nations accredited universities. USC Alumni have taken leadership in public policy, economics, business, urban planning and engineering, scientific research, health care, the arts, government and the professions throughout the U.S., the Pacific Rim and the world.

USC is itself the largest private employer in the city of Los Angeles, contributing about \$3 billion annually to the gross regional product, which in turn generates some 40,000 jobs. Its medical faculty staffs five of the city's major hospitals.

Undergraduate programs and schools include: College of Letters, Arts and Sciences, Engineering, Architecture, Music, Marshall School of Business, School of Cinema-Television, Annenberg School for Communication, Dentistry, Leonard Davis School of Gerontology, Medicine, Independent Health Professions, Law, and Theatre.

Graduate Programs and schools include: Architecture, Leventhal School of Accounting, Marshall School of Business, Cinema-Television, Dentistry, Rossier School of Education, Engineering, Fine Arts, Davis School of Gerontology, Independent Health Professions, USC Law School, College of Letters, Arts and Sciences, Medicine, Thornton School of Music, School of Pharmacy, Policy, Planning, and Development, Social Work, and Theatre.

38 Almanac 2000

Pepperdine University is a selective, mid-size, comprehensive university offering bachelor's, master's, and doctoral degrees in a wide range of disciplines. Pepperdine enrolls approximately 8,000 full-time and part-time students, with a full-time faculty of more than 300 professors and scholars.

Pepperdine University is a private Christian institution founded in 1937 on 34 acres in Culver City. It became a university in 1971 and grew with the addition of the 830 acre Malibu campus in 1972. Seaver College is a highly selective undergraduate college of approximately 3,000 students, offers a rigorous core curriculum with majors in a variety of disciplines, such as business, communication, fine arts, the humanities, natural sciences, social sciences, and religion. More than half the undergraduates study abroad. Selective Master's degree programs are also offered by Seaver College.

The George L. Graziadio School of Business and Management and the Graduate School of Education and Psychology are professional schools headquartered in Los Angeles, with multiple education centers located throughout Southern California. Though primarily focused on educating adult professionals, both schools offer residential programs on the Malibu campus.

The University's four professional schools offer graduate programs in management, education, psychology, law, and public policy. Pepperdine owns and operates campuses in England, Italy, and Germany for study-abroad programs. It offers regular programs in many other countries, for both graduate and undergraduate students, and has developed strategic alliances with universities throughout Europe, Asia, Australia, and Latin America to facilitate student and faculty exchanges.

The new Drescher Graduate Campus in Malibu is designed to include The Graziadio School of Business and Management, the Graduate School of Education and Psychology, and the School of Public Policy.

California Institute of Technology was founded in 1891, and is located just east of the San Fernando Valley on a 124-acre campus in Pasadena. The Institute also manages the nearby Jet Propulsion Laboratory and operates six other off-campus astronomical, seismological, and marine biology facilities. Cal Tech has an enrollment of some 1,800 students, more than half of whom are in graduate studies, and a faculty of about 280 professorial members and nearly 500 research members. Cal Tech employs a staff of more than 1,700 people on campus and more than 5,700 at JPL.

The mean combined SAT score of members of recent incoming freshman classes has consistently been over 1400, the highest in the nation. 26 Nobel Prizes have been awarded to faculty and alumni, with 43 receiving the National Medal of Science, and eight winning the National Medal of Technology. Caltech faculty and trustees





includes 75 fellows of the American Academy of Arts and Sciences, 68 members of the National Academy of Sciences and 43 members of the National Academy of Engineering (NAE). A 1977-86 study of private-university baccalaureate degree recipients found that 33% of Cal Tech graduates went on to earn doctorates. This study ranked Cal Tech No. 1 in Ph.D.s earned per capita -- ahead of its nearest rivals, the Massachusetts Institute of Technology (19%), and the University of Chicago (17%).

Study & Research Programs include: Aeronautics, Applied Mathematics, Applied Mechanics, Applied Physics, Astronomy, Biochemistry, Biology, Biotechnology, Chemical Engineering, Chemistry, Civil Engineering, Computation and Neural Systems, Computer Science, Control and Dynamical Systems, Electrical Engineering, Engineering Science/Bioengineering, Environmental Engineering Science, Geological and Planetary Sciences, Humanities, Materials Science, Mathematics, Mechanical Engineering, Physics, Science, Ethics, and Society/History and Philosophy of Science, and Social Science.

The academic work of the Institute is organized into six academic divisions: Biology; Chemistry and Chemical Engineering; Engineering and Applied Science; Geological and Planetary Sciences; the Humanities and Social Sciences; and Physics, Mathematics and Astronomy.

The Cal Tech Library System comprises the main collection in the Robert A. Millikan Memorial Library. The Millikan Library contains collections on biology, chemistry, humanities and social sciences, mathematics, and physics. The Sherman Fairchild Library of Engineering and Applied Science includes engineering; aeronautical, chemical, civil, electrical, environmental, and mechanical engineering; computer science; applied mathematics; and materials science. Other campus buildings house collections for geology, astrophysics, and public affairs.

The Jet Propulsion Laboratory (JPL) is operated by Cal Tech for the National Aeronautics and Space Administration, and leads the world in exploration of the planets. More than 3900 scientists and engineers work at JPL, which covers 177 acres on the northwest corner of Pasadena. A sampling of JPL's present and future projects reflects the challenging research opportunities for Cal Tech:

JPL's flight projects have included Ranger and Surveyor missions to the Moon; the Mariner missions to Mercury, Venus, and Mars; and the Infrared Astronomical Satellite, which mapped the sky in the infrared spectrum. The Voyager spacecraft have had a series of immensely successful scientific flybys of Jupiter, Saturn, Uranus, and Neptune. Magellan radar-mapped the hidden surface of Venus.

Current flight projects include Galileo, to Jupiter; Ulysses, to the Sun's poles, Mars Pathfinder, Mars Global Surveyor, and Cassini. The Hubble Space Telescope carries the JPL Wide-Field/Planetary Camera and instruments are being developed for other earth-orbiting satellites.

Claremont Colleges are a cluster of five undergraduate colleges and two graduate schools on adjoining campuses. Located within minutes to the east of the San Fernando Valley. Each is independent, with its own faculty, student body, adminis-

tration, and curricular emphasis. The Claremont Colleges combine efforts to provide many services, programs and facilities which help accomplish the group's common goals.

Claremont University Center (Est. 1925) is the central planning and coordinating body of the Claremont Colleges and the nucleus of the cluster plan. It is responsible for the development of central academic resources and programs, inter-collegiate organization and coordination, the establishment of new colleges and professional schools within the group, and the administration of central services and facilities.

Pomona College (Est. 1887) is the founding member of the Claremont Colleges group, is an independent, coeducational college offering instruction in all major fields of the arts, humanities, social and natural sciences. It emphasizes both liberal arts and pre-professional training.

The Claremont Graduate University (Est. 1925) offers advanced work in the humanities, fine arts, mathematics, social sciences, education, management, executive management, and information science. It is a graduate-only institution, granting masters and doctoral degrees.

Scripps College (Est. 1926) Scripps is a private liberal arts college for women, with a focus on the humanities. It offers academic and residential life experience for its 750 women on an aesthetically pleasing campus. Scripps confers the Bachelor of Arts degree, with more than 30 majors in five fields: the Arts, Languages and Literature, Philosophy and Religion, Science, and Social Sciences.

Claremont McKenna College (Est. 1946) offers the Bachelor of Arts degree in 26 fields, often combined by students in dual majors. Most of the College's students choose a major or part of a dual major in economics, government or international relations. CMC is unique among liberal arts colleges in that it actively supports faculty and student research and publications through seven research institutes, including the Rose Institute of State and Local Government.

Harvey Mudd College (Est. 1955) is a college of science and engineering. The curriculum is designed to create scientists and engineers with unusual breadth in their technical education and a firm academic grounding in the humanities and social sciences. Engineering students may opt for a fifth-year Master's program.

Pitzer College (Est. 1963) is a coeducational liberal arts college with a strong commitment to the values of a residential educational community. It offers concentrations in all major fields of the liberal arts with curricular emphasis on the social and behavioral sciences. Its particular strengths lie in encouragement of independent work and the development of a critical approach to the traditional disciplines.

The Keck Graduate Institute of Applied Life Sciences (Est. 1977) is the nation's first graduate school solely dedicated to the emerging fields of the applied sciences. KGI is dedicated to educational programs and research aimed at translating into practice, for the benefit of humanity, the power and potential of the life sciences.





Schools Technical & Trade

California Institute of the Arts occupies 60 acres on hills overlooking the city of Santa Clarita. CalArts was founded in 1961 by Walt and Roy O. Disney and Lulu May Von Hagen, and through the merger of two well-established professional schools: the Los Angeles Conservatory of Music, founded in 1883, and Chouinard Art Institute, founded in 1921. Since its founding, the Institute has established a national and international reputation as a leader in Fine Arts, Animation, and Film/Video Production. Alumni include award-winning filmmakers, Broadway performers, and artists whose works have been purchased by world-class museums.

Fall 1999 enrollment was 1232 with a ratio of 53% men to 47% women. Graduate students represent 34% of the student body and Californians make-up 33%. Students hail from 39 states, Puerto Rico, the Virgin Islands, and 25 foreign countries. The mean age for fall 1999 was 22 years for undergraduates, 27 for graduate students. Approximately 80 percent of students receive some form of financial aid.

CalArts supports the San Fernando Valley's massive entertainment industry cluster with offerings that include Art, Critical Studies, Writing, Film/Video, Experimental Animation, Character Animation, Music, Composition, Instrumental Performance, Theatre, Acting, Directing for Theatre, Video and Cinema, Performing Arts Design, Technology and Management, as well as Programs for Integrated Media. The Institute offers programs leading to the degrees of Bachelor of Fine Arts (BFA) and Master of Fine Arts (MFA) and undergraduate and advanced certificates.

The Fashion Institute of Design & Merchandising 15-acre Los Angeles campus is located near the garment district in downtown Los Angeles. It is a specialized, private college offering Associate of Arts, Professional Designation and Advanced Study programs in Fashion Design, Interior Design, Fashion Merchandise Marketing, Textile Design, Visual Communications, Graphic Design, Cosmetics & Fragrance Merchandising, Theatre Costume, International Manufacturing & Product Development, and Apparel Manufacturing Management. FIDM has an enrollment of 3,000 full-time students.

The American Film Institute was established in 1967 through an initiative of the National Endowment for the Arts, which established AFI as an independent, non-profit organization dedicated to preserving the heritage of film and television, identifying and training new talent, and increasing recognition and understanding of the moving image as an art form. Located south of the San Fernando Valley AFI is the nation's preeminent arts organization dedicated to advancing and preserving the art

of the moving image. Since 1967, AFI has served as America's voice for film, television, video, and the digital arts, with programs in education, training, exhibition, preservation, and new technology.

Programs and schools include: The Center for Advanced Film and Television Studies (CAFTS) offering M.F.A. degrees in cinematography, directing, editing, producing, production design, screenwriting, and M.A. in digital media. The Advanced Technology Program and Film and Television Arts Program offers courses to the general public in every aspect of moving image arts, including state-of-the-art digital technology. The Directing Workshop for Women and the Television Writers Summer Workshop provide learning experiences for aspiring artists within a single discipline.

AFI's National Center for Film and Video Preservation coordinates and supports American moving image preservation activities, including gathering, databasing, and making accessible comprehensive documentation on America's moving image heritage including the National Moving Image Database (NAMID) and the AFI Catalog.

West Valley Occupational Center

is located in Woodland Hills adjacent to Pierce College, and is operated by the Los Angeles Unified School District. The purpose of the center is to offer short-term vocational and technical training, providing individuals with entry-level skills or upgrading skills for the job market. Certificates are available in a broad range of vocations, including Business, Industrial, Automotive, Graphics, Landscaping, Culinary Arts, Health Care, Cosmetology, and Child Care. WVOC also prepares students for careers in Accounting, Computer Operation and Science, Clerical, Real Estate, and Legal Support.



North Valley Occupational Center/Aviation Center The main campus of NVOC is located in Mission Hills and the Aviation Center is adjacent to the Van Nuys Airport. A full-time Regional Occupation Center, NVOC is accredited, and offers classes in Business, Computer Skills, Real Estate, Health Care, Child Care, Automotive, Industrial Technology, Aviation Mechanics, Graphics, Literacy, ESL, and GED. The Pacoima Skills Center in Pacoima provides a convenient satellite campus for several of the course offerings.





K^{thru}12 Education

The San Fernando Valley is served by four public school districts; Burbank Unified, Glendale Unified, Las Virgenes Unified and Los Angeles Unified. The largest, Los Angeles Unified, manages over 600 elementary, middle school, high school, and specialized facilities, 203 of which are located in the Valley. Adding the 19 Burbank schools, the 29 Glendale schools, and the 13 Las Virgenes schools, brings the total number of public school facilities in the Valley to 264.

National Blue Ribbon Schools in the Valley have included Chaminade Preparatory/High School in West Hills (1998), Vaughn Next Century Learning Center Charter School in Lakeview Terrace (1996), Notre Dame High School in Sherman Oaks (1996), Louisville High School in Woodland Hills (1996), and Flintridge Sacred Heart Academy in La Canada (1996). The program is sponsored by the U. S. Department of Education and recognizes elementary and secondary schools.

Academic Decathlon The United States Academic Decathlon is a team competition wherein students match their intellects with students from other schools. Students are tested in ten categories: Art, Economics, Essay, Interview, Language and Literature, Mathematics, Science, Social Science, Speech, and Super Quiz. Taft High School in Woodland Hills took the national Silver Medal in competition in 1993, with El Camino High School in West Hills taking the national championship in 1998, as well as second-place in the state in 1999.

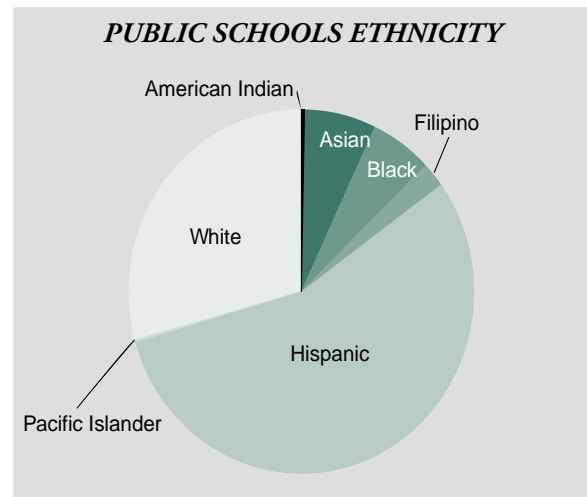
Adult Schools provide opportunities to supplement K-12 educational programs, vocational skills, language skills and other civic needs. Valley Adult Schools include, Burbank Adult School, El Camino Real Adult School in Woodland Hills, Kennedy-San Fernando Adult School in Granada Hills, North Hollywood-Polytechnic Adult School in North Hollywood, Reseda Community Adult School in Reseda, Van Nuys Community Adult School in Van Nuys, and East and North Valley Occupational Centers.



State of the Unifieds The San Fernando Valley's educational core is its Unified School Districts. In the 1990s the population of school-aged children increased significantly, increasing demand for facilities and educators.

Globalization and immigration have dramatically affected the enrollment and ethnic makeup of local schools in an extremely short time. This has, in turn, challenged educators and school districts to rethink their approaches to basic education and literacy.

Given the robust and highly technical nature of the San Fernando Valley economy, private schools, technical schools, and community colleges have filled in the educational gaps, providing a link to skills and careers that will meet the needs of Valley businesses.



ETHNICITY & ENROLLMENT - PUBLIC SCHOOL STUDENTS K-12 1999								
By District and Apportioned by Zip Codes								
District	Total	Asian	Black	Filipino	Hispanic	Am Indian	Pac Island	White
Burbank Unified	14,665	838	365	349	5,348	11	21	7,705
Glendale Unified	30,312	3,714	347	1,379	7,314	62	50	17,446
Las Virgenes Unified	11,783	899	173	72	569	25	28	10,017
Los Angeles Unified - Valley	206,666	12,231	13,197	4,239	132,025	831	516	43,627
San Fernando Valley Total	263,426	17,682	14,082	6,039	145,256	929	615	78,795
Percentage	100.0%	6.7%	5.3%	2.3%	55.1%	0.4%	0.2%	29.9%
Los Angeles Unified - Total	695,885	29,724	94,664	13,043	480,655	1,961	2,517	73,321
Los Angeles County	1,618,214	129,701	189,639	30,455	932,964	4,874	8,721	321,860
Percentage	100.0%	8.0%	11.7%	1.9%	57.7%	0.3%	0.5%	19.9%

Source: California Department of Education



Student Performance

Perhaps one of the greatest challenges to the region is that of K-12 education. As the “global economy” develops, and the demand for technical expertise increases, public schools are called upon to support colleges, universities and institutions with students ready to meet the challenge. With the Information Age comes the burgeoning need for employees and managers who can perform against global competition. The task is made all the more difficult by an unprecedented infusion of first generation immigrants who are in transition to the English language.

The Stanford 9 measures basic academic proficiency, and provides a measure of performance of schools and school districts. Because the scores compare students at or above the national average, and are evaluated using a 50th-percentile cut-off, a level at or below the 49th-percentile essentially equates to a zero.

Statewide in 1999, elementary school students topped prior Stanford 9 results in reading and math, with little change in middle and high schools. This is attributed in part to the emphasis on improvements in basic education, and fundamentals such as reading and math in the lower grades. In the districts serving the San Fernando Valley, scores for the Los Angeles Unified School District were the lowest, running between 18% and 37% versus a range of 26%-38% countywide. Las Virgenes School District scores were the Valley's highest with a range of 70%-88%. In part the disparity may be explained by each district's financial and cultural demographics. However, “Limited English Proficient” students also had dramatically better language and reading skills performance in Glendale, Burbank and Las Virgenes, roughly doubling the scores of the LAUSD.

In 1999, Van Nuys High School lead the LAUSD in SAT score averages with 1105, followed by two other above-average performers, El Camino Real High School in Woodland Hills with 1057 and the Sherman Oaks Center for Enriched Studies at 1045. For 1999, the national average was 1016 and the California average was 1011.

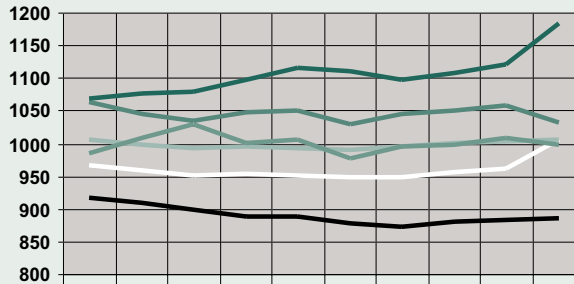
STANFORD 9 TEST RESULTS - 1999
Percent Scoring At or Above the 50th Percentile

Grade	District	Reading			Math			Language		
		¹ All	² NO LEP	³ LEP	All	NO LEP	LEP	All	NO LEP	LEP
2	Burbank	52%	63%	30%	56%	65%	39%	59%	70%	38%
	Glendale	47%	64%	35%	60%	69%	54%	55%	69%	45%
	Las Virgenes	73%	74%	57%	73%	73%	56%	80%	81%	42%
	Los Angeles	24%	42%	12%	36%	45%	30%	31%	49%	20%
	L.A. County	35%	50%	17%	44%	53%	33%	40%	55%	24%
	Statewide	44%	56%	19%	49%	57%	33%	47%	59%	24%
3	Burbank	49%	60%	17%	56%	70%	32%	54%	67%	26%
	Glendale	46%	70%	29%	57%	73%	46%	52%	70%	39%
	Las Virgenes	81%	82%	62%	85%	86%	81%	82%	82%	71%
	Los Angeles	21%	40%		32%	45%	24%	27%	44%	15%
	L.A. County	31%	47%	11%	41%	52%	28%	36%	50%	18%
	Statewide	41%	53%	12%	48%	57%	28%	43%	54%	19%
4	Burbank	48%	57%	13%	55%	71%	27%	57%	74%	27%
	Glendale	47%	72%	19%	51%	72%	28%	58%	79%	35%
	Las Virgenes	79%	80%	59%	78%	79%	74%	80%	81%	59%
	Los Angeles	22%	40%		28%	42%	16%	29%	45%	15%
	L.A. County	32%	47%	10%	37%	49%	20%	39%	53%	19%
	Statewide	41%	53%	11%	44%	52%	21%	47%	57%	20%
5	Burbank	51%	59%	15%	53%	63%	28%	60%	76%	31%
	Glendale	48%	72%	11%	57%	77%	29%	61%	81%	32%
	Las Virgenes	80%	82%	39%	83%	84%	58%	85%	86%	61%
	Los Angeles	24%	39%		29%	43%	14%	30%	45%	12%
	L.A. County	33%	47%		38%	50%	18%	40%	53%	17%
	Statewide	42%	53%	9%	45%	54%	19%	47%	57%	19%
6	Burbank	49%	52%		58%	71%	16%	54%	62%	10%
	Glendale	52%	74%	17%	67%	82%	45%	66%	82%	40%
	Las Virgenes	80%	80%	56%	83%	83%	67%	85%	86%	69%
	Los Angeles	24%	35%		30%	42%	10%	31%	44%	
	L.A. County	34%	46%		41%	52%	18%	41%	53%	15%
	Statewide	44%	54%	9%	50%	59%	22%	49%	58%	18%



COMBINED SAT RESULTS

For Districts Serving the San Fernando Valley



	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
LOS ANGELES COUNTY	968	960	952	953	951	950	948	957	961	1006
STATEWIDE	1006	1000	994	996	994	991	997	1001	1004	1007
BURBANK UNIFIED	985	1009	1030	1002	1007	977	996	998	1008	1000
GLENDALE UNIFIED	1063	1047	1034	1049	1052	1030	1045	1050	1059	1032
LAS VIRGENES UNIFIED	1070	1078	1079	1098	1117	1110	1099	1108	1121	1184
LOS ANGELES UNIFIED	918	909	899	890	888	878	873	880	884	885

High school students take the SAT as a precursor for admission to colleges and universities. The SAT is designed to measure verbal and mathematical reasoning abilities that are related to successful performance in college. In combined scores, the LAUSD ends 1998 33 points below 1989 levels, and 121 points below the County of Los Angeles, of which it is a part.

Las Virgenes leads the way with a combined average score of 1184 compared to a statewide score of 1013 and a national score of 1017.

According to the California Department of Education, 9% of California's test takers had parents who did not receive high school diplomas, compared to 4% nationally. Further, there are more low-income and first-generation immigrants students in California than the U.S. average. 19% of test takers statewide spoke another language before learning English, compared to 8% nationally.

STANFORD 9 TEST RESULTS - 1999

Percent Scoring At or Above the 50th Percentile

Grade	District	Reading			Math			Language		
		¹ All	² NO LEP	³ LEP	All	NO LEP	LEP	All	NO LEP	LEP
7	Burbank	49%	44%		51%	55%	14%	56%	58%	
	Glendale	47%	66%		58%	73%	27%	62%	80%	27%
	Las Virgenes	81%	82%	35%	81%	82%	53%	88%	89%	71%
	Los Angeles	25%	37%		26%	36%		33%	46%	
	L.A. County	35%	46%		36%	46%	13%	43%	55%	13%
	Statewide	44%	53%	7%	45%	52%	16%	51%	60%	17%
8	Burbank	55%	51%		49%	53%		58%	55%	14%
	Glendale	53%	74%	12%	58%	74%	27%	61%	80%	25%
	Las Virgenes	84%	85%		86%	87%		86%	87%	
	Los Angeles	28%	40%		26%	35%		31%	43%	
	L.A. County	38%	49%		37%	46%	13%	41%	51%	10%
	Statewide	47%	57%	8%	45%	52%	15%	49%	57%	12%
9	Burbank	39%	34%		54%	56%	26%	53%	55%	21%
	Glendale	37%	54%		63%	78%	31%	63%	80%	29%
	Las Virgenes	70%	74%		84%	85%	64%	87%	88%	45%
	Los Angeles	18%	26%		31%	40%	11%	33%	44%	
	L.A. County	26%	34%		40%	48%	17%	42%	52%	13%
	Statewide	34%	41%	3%	48%	55%	19%	49%	57%	15%
10	Burbank	36%	37%		51%	56%	26%	42%	45%	13%
	Glendale	33%	48%		53%	66%	25%	45%	61%	13%
	Las Virgenes	70%	71%	19%	77%	79%	71%	77%	80%	40%
	Los Angeles	20%	26%		30%	37%	12%	26%	33%	
	L.A. County	26%	32%		38%	44%	19%	32%	40%	
	Statewide	33%	38%	3%	44%	49%	20%	38%	45%	7%
11	Burbank	40%	36%		54%	60%	31%	55%	57%	22%
	Glendale	34%	47%		54%	67%	26%	52%	67%	16%
	Las Virgenes	70%	72%	10%	79%	80%	75%	80%	82%	43%
	Los Angeles	25%	31%		36%	42%	16%	37%	45%	
	L.A. County	30%	36%		40%	46%	22%	41%	49%	11%
	Statewide	35%	41%	4%	45%	50%	22%	47%	53%	11%

¹ALL: All students, including Limited English Proficient (LEP)

²NO LEP: Students identified as not Limited English Proficient (LEP)

³LEP: Students identified as Limited English Proficient (LEP)

Source: California Department of Education



Hospitals

The network of hospitals, long-term care facilities, clinics and home-health-care organizations in the Valley may be one of its least noticed but most important resources. Good health, is of concern to everyone.

The County's six hospitals include Olive View/UCLA Medical Center in Sylmar and a network of outpatient clinics and intermediary-sized comprehensive care centers.

The local healthcare system was challenged during the 1990s when the County of Los Angeles experienced financial difficulties. The healthcare system had been providing substantial services to the Los Angeles County Health Services Department, and had relied upon the County for a major share of its revenues.

The County's strength is a concern to the entire health care network, because they provide much of the uncompensated treatment to the more than 2 million Los Angeles County residents without health insurance.

Systemic problems were resolved in a landmark agreement between the county, state and federal governments. The agreement steered hundreds of millions of dollars into the County system, which has been the backbone of the region's medical care.



44 Almanac 2000

HOSPITALS IN THE SAN FERNANDO VALLEY

Health Care Facilities

Hospital	City	Lic Beds
Glendale Memorial Hospital and Health Center	Glendale	313
Glendale Adventist Medical Center - Wilson Terrace	Glendale	463
Verdugo Hills Hospital	Glendale	134
West Hills Hospital & Medical Center	Canoga Park	236
Valuemark Pine Grove Behavioral Health Care Center	Canoga Park	82
Northridge Hospital Medical Center	Northridge	435
Mission Community Hospital - San Fernando Campus	San Fernando	56
Los Angeles County Olive View Medical Center	Sylmar	377
Granada Hills Community Hospital	Granada Hills	201
Providence Holy Cross Medical Center	Mission Hills	257
Pacifica Hospital of the Valley	Sun Valley	248
Encino-Tarzana Regional Medical Center - Tarzana	Tarzana	236
Tarzana Treatment Center	Tarzana	60
Motion Picture & Television Hospital	Woodland Hills	256
Kaiser Foundation Hospital - Woodland Hills	Woodland Hills	218
Hollywood Community Hospital of Van Nuys	Van Nuys	60
Kaiser Foundation Hospital - Panorama City	Panorama City	325
Mission Community Hospital - Panorama Campus	Panorama City	96
Sherman Oaks Hospital and Grossman Burn Center	Sherman Oaks	153
Northridge Hospital Medical Center - Sherman Way	Van Nuys	227
Van Nuys Hospital	Van Nuys	41
Lions Gate Psychiatric Health Facility	Van Nuys	20
Valley Presbyterian Hospital	Van Nuys	347
Encino-Tarzana Regional Medical Center - Encino	Encino	151
Thompson Memorial Medical Center	Burbank	105
Providence St. Joseph Medical Center	Burbank	455
North Hollywood Medical Center	North Hollywood	160

Source: California Office of Statewide Health Planning and Development, Data Users Support Group,

BIRTHWEIGHTS AND INFANT MORTALITY - 1999

By San Fernando Valley Zip Codes and Communities

City	Births % Normal Birthweight	Births % Low Birthweight	Infant Deaths	Death Rate per 1000 Infants
Burbank	94.4%	5.6%	7	6.8
Calabasas Area	90.2%	9.8%	3	4.9
Glendale	93.1%	6.9%	9	4.4
Los Angeles - Valley	93.2%	6.8%	114	6.2
San Fernando	94.5%	5.5%	2	2.6
S.F. Valley Totals	93.2%	6.8%	135	5.9
County of Los Angeles	92.0%	8.0%	976	5.8

Source: Economic Alliance of the San Fernando Valley, Los Angeles County Department of Health Services

Health & Welfare

BIRTHS BY ETHNICITY - 1999

By San Fernando Valley Zip Codes and Communities

City	Births African-American	Births Asian-Pacific	Births Latino	Births White	Births Other Ethnicity	Births Unknown Ethnicity
Burbank	33	149	540	615	19	5
Calabasas Area	2	44	45	490	6	4
Glendale	26	453	917	1,256	29	10
Los Angeles - Valley	965	1,496	13,543	5,746	254	44
San Fernando	17	5	712	32	3	-
S.F. Valley Totals	1,043	2,147	15,757	8,139	311	63
County of Los Angeles	15,276	15,349	103,103	32,050	1,445	230

Source: Economic Alliance of the San Fernando Valley, Los Angeles County Department of Health Services

The Valley has 28 hospitals, 20 of them with emergency rooms, that have nearly 5,700 licensed beds.

Some neighboring hospitals also provide care, particularly County-USC Medical Center in Boyle Heights, the nation's largest and busiest hospital and home to one of the best regarded emergency rooms in the nation as well.

BIRTHS BY AGE OF MOTHER - 1999

By San Fernando Valley Zip Codes and Communities

City	Total Births	Births Mothers <15 Yrs	Births Mothers 15-17 Yrs	Births Mothers 18-19 Yrs	Births Mothers 20+ Yrs
Burbank	1,361	1	30	50	1,280
Calabasas Area	591	-	2	5	584
Glendale	2,691	1	55	86	2,549
Los Angeles - Valley	22,048	69	881	1,341	19,750
San Fernando	769	2	41	71	655
S.F. Valley Totals	27,460	73	1,009	1,553	24,818
County of Los Angeles	167,453	473	7,626	12,053	147,258

Source: Economic Alliance of the San Fernando Valley, Los Angeles County Department of Health Services



NUMBER OF DEATHS BY LEADING CAUSE - 1999

By San Fernando Valley Zip Codes and Communities

City	Deaths From Heart Disease	Deaths From Cerebro Vascular Stroke	Deaths From Cancer	Deaths From COPD Lung Diseases	Deaths From Pneumonia Influenza	Deaths From Liver Disease	Deaths From Diabetes
Burbank	257	52	210	42	52	17	15
Calabasas Area	48	8	56	2	5	-	3
Glendale	550	99	333	73	99	15	40
Los Angeles - Valley	2,668	491	1,850	330	378	109	196
San Fernando	57	12	30	4	6	2	4
S.F. Valley Totals	3,580	662	2,479	451	540	143	258
County of Los Angeles	19,232	4,020	13,237	2,598	2,958	1,029	1,632
	Deaths From Accidents	Deaths From Suicide	Deaths From Homicide	Deaths From AIDS	Deaths From Other Causes	Total Deaths	
Burbank		20	18	3	8	109	803
Calabasas Area		12	9	-	1	22	166
Glendale		46	18	16	17	191	1,497
Los Angeles - Valley		291	104	99	173	1,080	7,769
San Fernando		9	1	6	5	16	152
S.F. Valley Totals		378	150	124	204	1,418	10,387
County of Los Angeles		2,104	846	1,437	1,481	8,326	58,900

Source: Economic Alliance of the San Fernando Valley, Los Angeles County Department of Health Services

Another 51 institutions provide some form of specialized care, such as psychiatric treatment. Many Valley residents need some sort of help or low-level medical care that will allow them to remain independent. In all, 83 companies in the Valley provide home-health care services to those people.

The Valley has another 81 long-term care facilities, with nearly 8,200 beds providing care for the aged and those with chronic illnesses or injuries that require institutionalization.



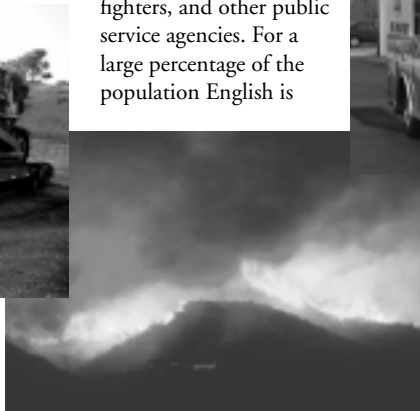
Public Safety

The San Fernando Valley's relatively stable communities and economy have made it a cultural and economic focus of the region. This also contributes to its improved public safety record. The Valley has pioneered a number of community self-help and involvement programs including "Neighborhood Watch" and "Business Watch."

Like any urban area, the San Fernando Valley faces issues

of crime and related ills. And like the rest of the nation, the Valley has benefited from the steady decline in recent years in the incidence of violent crime. In the Valley, reports of violent

crime have dropped each of the past five years, in every major category, and the declines have been significantly larger than those reported nationally. Homicides have dropped by two-thirds during the most recent five-year period -- one of the largest improvements of any category, and almost double the national rate.



Robberies have seen a similar decline. Overall, all forms of property crime have dropped 10 percent per year over the past five years, while at the national level average property crimes have declined a more modest 2.9 percent.

The area's diversity presents unique challenges for law enforcement, firefighters, and other public service agencies. For a large percentage of the population English is



either a second language, or not spoken at all. With dozens of languages being spoken, communications can at times be difficult.

New immigrants often bring with them cultural predispositions of fear and mistrust of

authorities, further challenging personnel. Yet, with time also come changes to the public sector workforce, which is gradually beginning to mirror the ethnicity of the population.

Fire & Rescue

Fire Class Ratings of Fire Departments Serving the San Fernando Valley – 1999 Public Protection Ratings		
Fire Department	Fire Class Rating	
City of Glendale	1	City of Glendale Fire Department
City of Burbank	2	City of Burbank Fire Department
City of Los Angeles	1	City of Los Angeles Fire Department
Calabasas Area L.A. County Fire Station #67	4	County of Los Angeles Fire Department
Calabasas Area L.A. County Fire Station #68	4	County of Los Angeles Fire Department
Calabasas Area L.A. County Fire Station #125	9	County of Los Angeles Fire Department
City of San Fernando	1	City of Los Angeles Fire Department

The purpose of the Fire Suppression Rating Schedule is to determine a community's ability to control fire damage, including such variables as water supply and distribution systems, fire alarm receiving and dispatching procedures, fire-fighting equipment, training of the engine and ladder service companies, and needed fire flow. The Public Protection Ratings are on a scale of one to ten, with one being the highest rating. Only a handful of cities nationwide receive a class 1 rating.

Fire & Rescue Services

The quality of available fire and rescue services is evaluated by a national rating system. There are 55 fire stations and supportive facilities in the San Fernando Valley. Chief among their responsibilities is the prevention and control of brush fires and wildfires. The area's firefighters are veterans in disaster control. The region boasts some of the most sophisticated technology and aerial suppression equipment located anywhere in the world.



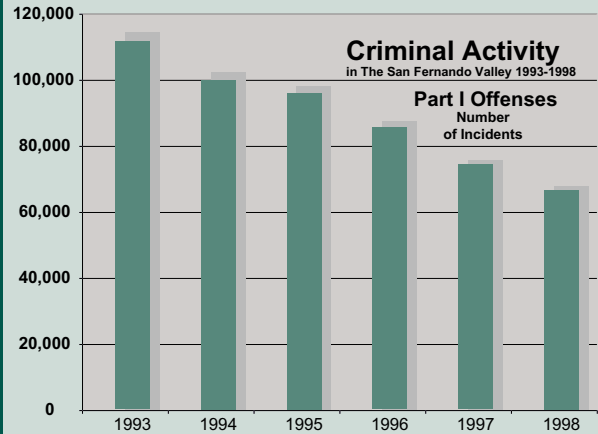


Crime is Decreasing

The San Fernando Valley is the beneficiary of five of the most effective local law enforcement agencies in the country. The cities of Burbank, Glendale, Los Angeles and San Fernando each have their own police departments. The Los Angeles County Sheriff's Department protects the cities of Calabasas and Hidden Hills, as well as the far-flung unincorporated Valley areas.

As can be seen, this has resulted in reductions in crimes against people and property between the years 1993 and 1998. The City of Los Angeles takes the brunt of statistical poverty, and with it the inevitable crime problems that follow. Nonetheless, the City has racked-up considerable gains in crime abatement. Rates for the Valley portion of the City of Los Angeles tend to track more closely with the adjacent cities of Glendale, Burbank, and San Fernando.

Crime



CRIMINAL ACTIVITY BY CITY/COUNTY AND TYPE

Part I Offenses - Homicide, Forc. Rape, Robbery, Agg. Assault, Burglary, MV Theft, Larceny, Arson

Jurisdiction	Willful Homicide	Forcible Rape	Robbery	Aggravated Assault	Burglary	Motor Vehicle Theft	Larceny-Theft	Arson
Burbank	4	8	94	179	421	601	1,853	4
Calabasas	-	1	9	36	78	33	170	4
Glendale	2	19	206	331	737	873	3,178	45
Hidden Hills	-	-	-	4	3	-	11	-
Los Angeles - Valley*	129	422	4,798	9,558	7,898	8,617	24,239	780
San Fernando	2	11	68	72	125	218	520	1
San Fernando Valley	137	461	5,175	10,180	9,262	10,342	29,971	834
Los Angeles City - Total	426	1,395	15,835	31,545	26,067	28,441	79,997	2,575
Los Angeles County	959	2,724	31,041	59,440	67,584	65,239	174,049	4,255

Sources: FBI Crime Index, Los Angeles Police Department, State of California CCI. *Estimate

CRIME INCIDENTS PER 1,000 POPULATION

Part I Offenses - Homicide, Forc. Rape, Robbery, Agg. Assault, Burglary, MV Theft, Larceny, Arson

Jurisdiction	Police Agency	Total Part I Crimes 1998	Total Population 1998	Incidents per 1,000 Population
Burbank	Burbank PD	3,164	101,380	31
Calabasas	Sheriff's Dept LA Co	331	56,437	6
Glendale	Glendale PD	5,391	200,648	27
Hidden Hills	Sheriff's Dept LA Co	18	905	9
Los Angeles - Valley*	Los Angeles PD	55,482	1,239,109	45
San Fernando	San Fernando PD	1,017	34,018	30
San Fernando Valley	Multi-Agency	65,403	1,633,497	40
Los Angeles City - Total	Los Angeles PD	186,281	3,576,704	52
Los Angeles County	Multi-Agency	405,291	9,369,227	43

Sources: FBI Crime Index, Los Angeles Police Department, State of California CCI. *Estimate



CRIMES TRENDS BY CITY/COUNTY - 1993-1998

Part I Offenses - Homicide, Forc. Rape, Robbery, Agg. Assault, Burglary, MV Theft, Larceny, Arson

Jurisdiction	1993	1994	1995	1996	1997	1998
Burbank	4,819	4,662	4,251	4,171	3,805	3164
Calabasas	561	639	558	495	373	331
Glendale	8,288	7,403	8,002	7,015	5,865	5391
Hidden Hills	56	42	18	54	91	18
Los Angeles - Valley*	96326	85666	81683	72371	62986	56443
San Fernando	1249	1277	1215	1198	1050	1017
San Fernando Valley	111,299	99,689	95,727	85,304	74,170	66,364
Los Angeles City - Total	317,908	282,727	269,583	238,851	207,876	186,282
Los Angeles County	652,939	598,845	570,234	510,712	450,885	405,291

Sources: FBI Crime Index, Los Angeles Police Department, State of California CCI. *Estimate



Transportation & Freight

One of the most important elements in any area is the transportation infrastructure. This is particularly true in the San Fernando Valley, being part of a massive cluster of cities and communities widely disbursed across the Southern California landscape. The Valley has approximately 75 miles of freeways, 29 bus routes, 63 miles of passenger and freight railroad track, 72 trucking terminals for major truck transportation companies, a major regional commercial airport, the busiest general aviation airport in the world, and access to the largest ocean shipping port in the United States -- and all this in a valley approximately 28 miles long and 11 miles wide. These arteries of commerce connect retail businesses, consumers, manufacturers and services providers to one another, as well as providing links from the Valley to the rest of Southern California.



In the first comprehensive inventory of California's transportation future, considerable emphasis has been given to Valley highway projects. This includes a prospective busway system, improvement and widening the 405 and 101 freeway interchange, and the adding of car pool lanes to Interstate 5 between the Valley and downtown Los Angeles. In the years to come the San Fernando Valley transportation infrastructure will continue to be updated and improved to serve its dynamic population

Airports Nearby Los Angeles International Airport is the fourth largest airport in the world for number of passengers handled. Los Angeles International and Burbank airports provide most of the commercial air access for the region, with an eye-popping 60-percent growth rate in passengers over the past 15 years, to 67 million riders in 1997. Air cargo also has risen at Burbank and LAX, jumping 9 percent between 1996 and 1997 alone.

Originally known as Mines Field, the LAX site has been used as a general aviation field since 1928. During World War II, it was used for military flights and following the war, in December 1946, it began commercial airline service.

Located in the eastern San Fernando Valley on the boundary between the cities of Burbank and Los Angeles, is an alternative to the often-crowded LAX. The Burbank Glendale Pasadena Airport, as it is



currently designated, also served military functions in WWII, being the home base for Lockheed Aircraft. Burbank serves six major passenger air carriers with destinations to 114 cities in the United States, Canada, Mexico, and Taiwan. Burbank has linking stations to Amtrak and Metrolink to facilitate access to the region.

Van Nuys Airport and Whiteman Airpark have also grown busier in recent years, particularly as bases for general aviation. They provide convenient and efficient hubs for numerous corporate jets and executive aircraft.

Van Nuys airport is rated the busiest general aviation airport in the world with over one-half million "operations" annually on its two runways. In addition to runways and the control tower, it houses a helicopter center, safety installations and aeronautic training institutions. Some 758 aircraft are based at VNY, including 52 helicopters, 128 jets, 27 turbo-prop and 531 piston aircraft.

LOS ANGELES INTERNATIONAL AIRPORT VOLUME OF AIR TRAFFIC			
	DOMESTIC	INTERNATIONAL	TOTAL
PASSENGERS	46,126,904	15,088,808	61,215,712
AIR CARGO (TONS)	1,185,612	866,261	2,051,873

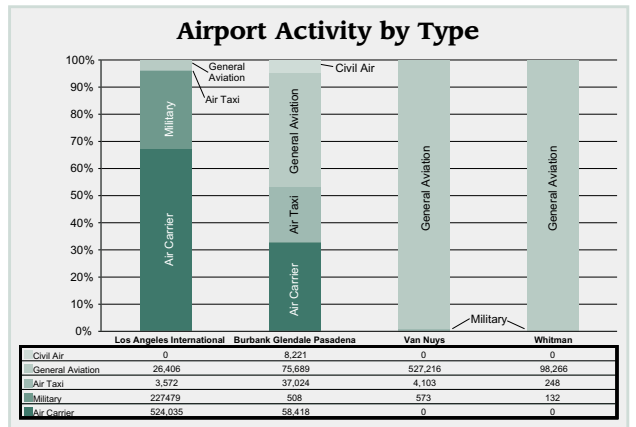
Source: Los Angeles World Airports

AIR CARGO VOLUME - TONS AIRPORTS SERVING THE SAN FERNANDO VALLEY			
	Mail	Freight	Total Cargo
Los Angeles International	212,410	1,852,487	2,064,897
Burbank Glendale Pasadena	3,722	36,325	40,047

Source: FAA, L.A. World Airports, Burbank Glendale Pasadena Airport 1997.

AIRPORT OPERATIONS AIRPORTS SERVING THE SAN FERNANDO VALLEY						
	Air Carrier	Military	Air Taxi	General Aviation	Civil Air	Total
Los Angeles International	524,035	227,479	3,572	26,406	-	781,492
Burbank Glendale Pasadena	58,418	508	37,024	75,689	8,221	179,860
Van Nuys	-	573	4,103	527,216	-	531,892
Whitman	-	132	248	98,266	-	98,646

Source: FAA, L.A. World Airports, Burbank Glendale Pasadena Airport 1997.





Whiteman Airpark is located in Pacoima and provides a convenient northeast Valley alternative to busy Van Nuys Airport.

Seaports The Valley is minutes from two of the world's busiest seaports, the Port of Long Beach and the Port of Los Angeles, along with Ventura County's smaller but bustling Port Hueneme. Nearly a million cruise passengers departed from the Port of Los Angeles in 1996 and 1997, while sea cargo continues to flow through the region's ports in huge, ever growing volumes. The region's connections to the rest of the Pacific Rim's economies are shown by the array of furniture, food, machinery, clothing and plastics coming into the ports, and scrap metal and waste, and coke, coal and oil going out.



Annual Metric Revenue Tonnage handled by the Port of Los Angeles approaches 80 million MRT's, with another 105 million MRT's being handled by the neighboring Port of Long Beach. With major expansion of the ports, and the addition

of the Alameda Corridor rail/freight improvements, the capacity of the combined ports will soon exceed 200 million MRT's. Top trading partners for the ports include China, Taiwan, South Korea, Thailand, Indonesia, and Australia. Top exports are coke, coal, chemicals, iron and steel scrap, petroleum, waste paper, and food.

The Port of Los Angeles demonstrated the importance of the San Fernando Valley in foreign trade within Southern California, with its 1999 announcement of the opening of a foreign trade office in the Valley. It will provide support and promotion for target businesses and further facilitate trade links between the Valley and the Port.

Commuter Rail The Valley has five stations on the Amtrak railroad line between San Diego and Santa Barbara, as well as two lines of the Metrolink commuter rail service. One Metrolink line extends to the northwest through Santa Susana Pass to connect the Valley with portions of Ventura County, and the other winds along Interstate 5 into the Santa Clarita Valley and northern Los Angeles County. The Metropolitan Transportation Authority's soon-to-be-completed subway service between downtown Los Angeles and North Hollywood provide additional mobility for residents.



Metro Rail Red Line The opening of the first section of the Valley branch of the MTA subway/rail system was widely-hailed as a great achievement. As with most significant public works, the \$200-\$300 million-per-mile Red Line to the Valley was built amidst controversy. Once completed, it will be a vastly important addition to the area, which it serves. Two stations have been constructed to feed into the existing bus/automobile transportation system -- one at Universal Studios, and a second in downtown North Hollywood. As L.A.'s Mayor Richard Riordan stated, "We have proven that we can start things and we can finish things." Long-term plans include extension of high-capacity, dedicated transit ways west to Warner Center and North to San Fernando and Sylmar.



Bus Transit The mainstay of the regional public transportation system remains the venerable bus. Over time, the MTA bus system has proven the most flexible and practical system for the transit-dependent population. To date, however, residents have shown a distinct resistance to trading their cars for public transportation.

In a recent survey by the Economic Alliance of the San Fernando Valley, only 8% said they use the bus often, 16% seldom, and 76% said they "never" use the bus. Nonetheless, buses remain an infrastructure staple, and proposals are being considered to create dedicated busway systems to service the Valley.

The MTA has found that turning the ownership of Metrolink stations over to the cities in which they are located promotes integrated development around the stations including shops, day care, and other needs for the train commuter, creating a village concept that in turn will seed the areas for possible further positive development.

Highways & Roads The region's main transportation, of course, remains the car. As with much of Southern California, the Valley's love affair with the car is legendary. A series of major highways gird the Valley from nearly every direction, carrying hundreds of thousands of commuters each way every day. Congestion on those freeways has been somewhat eased recently with a series of improvements in choke points such as the intersection of Highway 101 and Interstate 405 in the south central Valley. Traffic remains the number one concern for residents of this sprawling region.



Communications & Media

Being part of the Southern California region, the San Fernando Valley shares in one of the richest areas in the world when it comes to entertainment, media and communications infrastructure. The Valley has two major telephone companies, GTE California and Pacific Bell, and seven cellular phone companies. The area is served by nine broadcast channel television stations, seven cable television networks, dozens of local newspapers and publications, and nearly one-hundred and twenty AM and FM radio stations, presenting thirty-four different formats.

Among the newspapers and publications based in the Valley is the venerable Los Angeles Times, Valley Edition and the Los Angeles Daily News, a long-standing Valley newspaper. Thi Daily News developed from humble beginnings as the Van Nuys News in 1911, and was known in the 50s and 60s as The Valley News and Green Sheet. What was initially a community "shopper" with local Valley news, has grown up with the Valley and is now owned and operated by Media News Group, a national news organization.

BROADCAST TELEVISION STATIONS SERVING THE SAN FERNANDO VALLEY

Channel	Call	City/Community
2	KCBS	Los Angeles
4	KNBC	Burbank
5	KTLA	Hollywood
7	KABC	Los Angeles
9	KCAL	Los Angeles
11	KTTV	West Los Angeles
13	KCOP	Hollywood
28	KCET	Los Angeles
34	KMEX	Los Angeles

Source: Economic Alliance of the San Fernando Valley

Virtually every ethnic, religious, or special interest group has access to news and publications tailored to their needs. Aside from the mainstream media, the area enjoys a broad selection of niche publications.

KNBC, the NBC affiliate, is located in Burbank and the west coast studios of the network are also co-located there. Produced here are many national sitcoms and game shows including *The Tonight Show*, as well as local and

national news broadcasts familiar to the whole nation.

Some of the earliest innovations in television were developed by local independent stations such as KTTV-11 and KTLA-5. Although TV was still in its embryonic stage, viewers were captivated in 1949 with 27 hours of continuous live coverage of Kathy Fiscus, a little girl who had fallen down a well. Local stations have been quick to embrace new technologies, and have made good use of mobile crews and live helicopter coverage of breaking stories.

The Valley has spawned many worldwide innovations in media as well. The feature-length cartoon was born in the Valley, fathered by Walt Disney. Local firms, Disney, Warner Brothers and Hanna-Barbera, have driven the animation industry to the significant force it is today. The theme park was born in the Valley with the original Disneyland being planned near the

CABLE TELEVISION COMPANIES SERVING THE SAN FERNANDO VALLEY

Name	Community
Time Warner	Chatsworth
TCI East Valley	Van Nuys
Century Cable Systems	Van Nuys
Marcus Cable Co.	Burbank
Media One	Tujunga
Falcon Cablevision	Malibu
Cala Vision	Calabasas

Source: Economic Alliance of the San Fernando Valley

Disney Studio in Burbank. Disney later changed his plans to a site in Anaheim where land was more abundant and less expensive. The rest is history.

In a recent survey by the Economic Alli-

ance of the San Fernando Valley, 74% of respondents indicated they had cable television in their homes -- 67% have a home computer, 53% have access to the Internet, and 54% have cellular telephones. Cable-Modem technology is now available in many areas, providing much-desired broadband access to the Internet.

LOCAL NEWSPAPERS AND PUBLICATIONS SERVING THE SAN FERNANDO VALLEY

Name	Community
Acorn Newspaper	Westlake Village
Armenian Life Weekly	Glendale
Armenian Observer	Los Angeles
Asbarez Armenian Daily Newspaper	Glendale
Asian Journal	Los Angeles
Bnai Brith Messenger	Los Angeles
Burbank Leader	Burbank
Burbank Times	Burbank
Christian Herald	Los Angeles
Daily Commerce	Los Angeles
The Daily Democrat	Woodland Hills
Daily Variety	Los Angeles
Foothill Leader	Tujunga
Glendale News-Press	Glendale
Granada Hills Neighbor	Granada Hills
Hispanic Today	Calabasas
Hispanic World News	Reseda
Hollywood Reporter	Los Angeles
Isreal Today	Van Nuys
Japanese-American Newspaper	Glendale
Japan Times	Los Angeles
Jewish Journal	Los Angeles
Korea Times	Van Nuys
L.A. Sentinel Newspaper	Los Angeles
La Opinion Newspaper	Van Nuys
Los Angeles Business Journal	Los Angeles
Los Angeles Daily Journal	Los Angeles
Los Angeles Daily News	Canoga Park
Los Angeles Times	Chatsworth
Los Angeles Weekly	Los Angeles
Manila Bulletin USA	Reseda
Metropolitan News	Norwalk
News Magazine Etc.	Sherman Oaks
Noho News	North Hollywood
Photo Buys	Los Angeles
Pennysaver	Van Nuys
Philippine Nation News	Encino
Recycler	Van Nuys
San Fernando Valley Gazette Express	Panorama City
San Fernando Valley Business Journal	Woodland Hills
Sobh E Iran	Reseda
Tolucan & Valley Life	North Hollywood
Valley Business Journal	Woodland Hills
Valley Magazine	North Hills
Valley Vantage	Sherman Oaks
Warner Center News	Woodland Hills

Source: Economic Alliance of the San Fernando Valley



Demographics

Who Lives in the Valley? Valley girls? Rich white suburbanites? There are many stereotypes of the Valley that have been shaped and reinforced in part by one of its biggest exports, entertainment. But who makes up the Valley is changing quickly, as demographic data shows.

The Valley's overall population has grown slowly in the 1990s, to some extent the result of a poor economy, the transition from aerospace, and the effects of the Northridge Earthquake in the decade's first half. The Census Bureau estimates 1,631,592 people lived in the Valley in 1998, up from a little more than 1.58 million residents in the 1990 census. The Valley is expected to grow by about 3 percent through 2003, well below the county's 4.4 percent projected growth, and 6.7 percent nationwide. Calabasas, which is small but growing fast, had the highest rate of growth, while the huge Los Angeles portion of the Valley is growing at the slowest rate.

Despite Calabasas' fast growth, it remains the least dense city in the Valley, roughly one third the level of San Fernando. The horse country of Sylmar is the Valley's least densely populated zip code, while 91205 in Glendale is packed with apartment buildings.

The ratio of white population of the Valley decreased between 1990 and 1999 to 48.5 percent, with whites no longer making up a majority of the Valley's population. Dropping from 59 percent in the nine years since 1990. Non-white Hispanics accounted for much of the rest of the population, comprising almost 39 percent of the region's residents.

And while there are plenty of comfortable suburban tracts of housing, the Valley actually has a higher percentage of renters to homeowners than does the nation at large. And those renters are paying a lot to live there, with more than half of all units costing more than \$600 per month, and rents higher than the county and national averages. This may be in part



due to vacancy rates that are slightly lower than the national average, perhaps another reverberation of the destruction caused by the 1994 Northridge Earthquake.

Slightly more than half of all Valley residents are married, with nearly another third having never married. The average household has 2.8 people in it, and nearly 62 percent of households in the Valley are families, a tad below the county wide rate of 64.2 percent, and well below the U.S. average of 70 percent. The Valley is also aging, and is somewhat older than the county or nation as a whole. But oddly, while the Valley has more households headed by someone between 45 and 54, it has comparatively fewer elderly heads of households. The single biggest portion of Valley residents are between 35 and 49, and the next largest portion is children less than 9 years old, which will mean some challenges for the area's education infrastructure over the next decade.

Most of the Valley's jobs are concentrated in white collar managerial and technical sectors -- an excellent base of quality employment opportunities for well educated and trained workers. More than half the Valley's residents have taken at least some college course, and more than a third have a degree. While fewer Valley residents have a high school degree than does the overall U.S. population, more of its residents have college degrees.

Calabasas is one of the region's wealthier communities, with median household wealth more than double the national average. Burbank and San Fernando trail the national average, while Los Angeles and Glendale are modestly above it.





Housing Trends

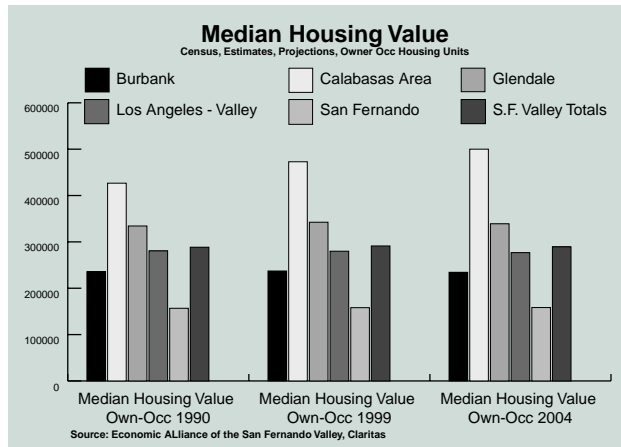


In the 1940s Bing Crosby brought national attention to the area in the lyrics of the Gordon Jenkins song "San Fernando Valley." The conversion of the Valley from rural farms to the new suburbia began to gather steam in the late 1940s with the end of WWII. Returning GI's and frostbitten easterners were lured to the area by media visions of flower covered Rose Parade floats, year-round gardening, and residents moving about in shorts and shirtsleeves on New Year's day.

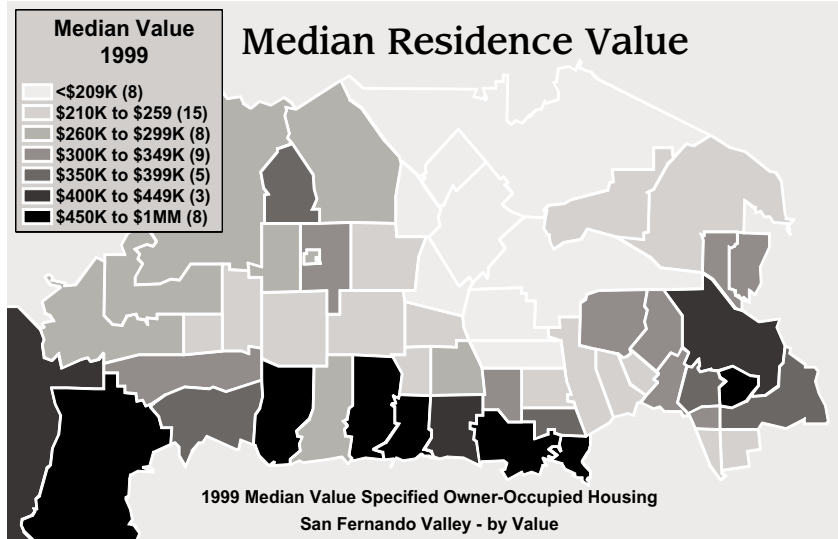
Fifty years later the Valley has a population that would make it the fifth largest metropolis in America. Its population is as diverse as almost anywhere else in the world. 1999 estimated population stands at 1,680,547, and is projected to increase to 1,763,013 by 2004. Many believe its strength is in its diversity; ethnically, socially, and economically. A complete life experience can be had by all.

Families still call the San Fernando Valley their home. It is a "natural" choice because of the environment and climate and ready access to mountains, beaches, museums, and libraries. While once a vast stereotypical bedroom and shopping mall haven for the city's expanding middle class, the Valley has undergone a dramatic demographic transformation. During the 50s and 60s the Valley was 95% white and 25% families with children. As it grew, the older areas increased in numbers of minorities with families. Today, the Valley is mostly families with children, and less than 50% white.

These numbers only partially show the rich ethnic and religious diversity found in the Valley. Within the statistical categories one can find large numbers of Mexican, South American, Kurdish, Armenian, Iranian, Chinese, Fili-



City	Median Housing Value Own-Occ 1990	Median Housing Value Own-Occ 1999	Median Housing Value Own-Occ 2004
Burbank	235,689	237,159	234,386
Calabasas Area	426,621	472,841	500,001
Glendale	334,292	342,394	339,026
Los Angeles - Valley	280,588	279,853	276,726
San Fernando	156,730	158,065	158,345
S.F. Valley Totals	288,497	291,216	289,266
Los Angeles County	266,899	270,525	270,179



pino, Vietnamese, Jewish, Egyptian, African, and Korean peoples.

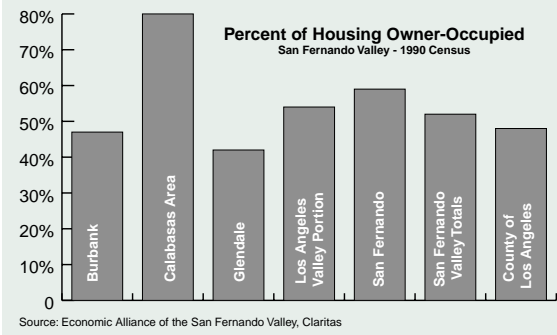
Within a 10-minute drive of Sherman Oaks, for example, one can find Chinese, Indian, Israeli, Armenian and Latino markets, as well as scores of authentic ethnic restaurants, clothing stores and bakeries.

Driving the Valley's streets one can see commercial messages in English, Spanish, Armenian, Chinese, Korean, Japanese and Arabic. The Valley's neighborhoods are each developing their own unique character and sense of uniqueness. Yet the communities seem to retain a common commitment to family life and investment in the future.



Owner/ Renter Occupancy

*“High Ratio
of Home
Ownership”*



HOUSING UNITS OWNER OCCUPANCY RATIO

1990 Census, by SFV Zip Codes

	Owner-Occupied Housing Units	Renter-Occupied Housing Units	Total Occupied Units	Percent Owner-Occupied
Burbank	19129	21372	40501	47%
Calabasas Area	13405	3448	16853	80%
Glendale	30860	42543	73403	42%
Los Angeles - Valley	231995	201252	433247	54%
San Fernando	4616	3199	7815	59%
S.F. Valley Totals	300005	271814	571819	52%
County of Los Angeles	1466822	1561768	3028590	48%

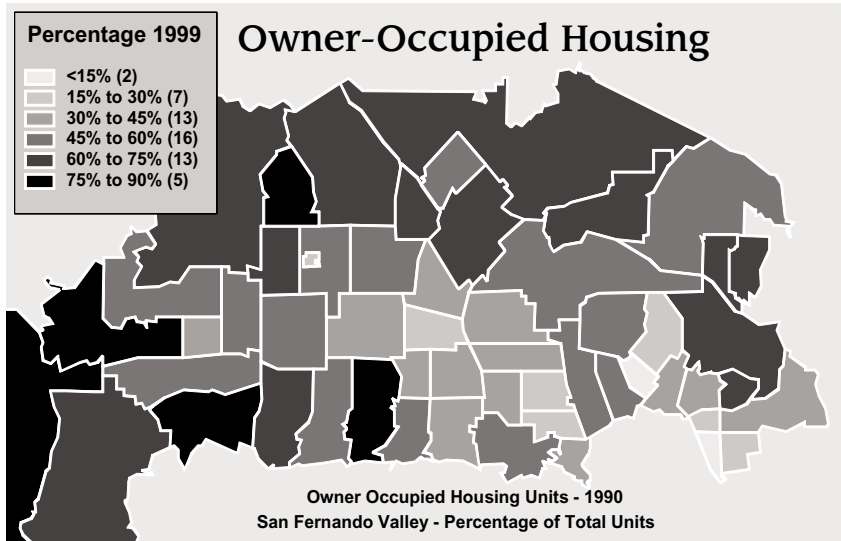
Source: Economic Alliance of the San Fernando Valley, Claritas

HOUSING UNITS TENURE AND OCCUPANCY STATUS

1990 Census, by SFV Zip Codes

City	Total Housing Units	Occupied Housing Units	Owner-Occupied Housing Units	Renter-Occupied Housing Units
Burbank	42,498	40,502	19,129	21,372
Calabasas Area	18,569	16,853	13,405	3,448
Glendale	77,086	73,402	30,860	42,543
Los Angeles - Valley	457,624	433,247	231,995	201,252
San Fernando	8,028	7,815	4,616	3,199
S.F. Valley Totals	603,805	571,819	300,005	271,814
County of Los Angeles	3,204,536	3,028,590	1,466,822	1,561,768

Source: Economic Alliance of the San Fernando Valley, Claritas



Much of the story of the Valley's cities can be told from the home-ownership statistics. While all areas of the Valley rank quite high, the contrast can be seen between the relatively wealthy rural City of Calabasas at 80 percent, and the well-developed metropolitan cities of Glendale and Burbank.

In the midst of this with ownership 11 percentage points higher than the Los Angeles County average, is San Fernando -- a city that is distinctly suburban, with a preponderance of modest single-family residences.

The ratio of owners to renters in a given study area is often seen as one measure of community stability. Residents that have a substantial financial investment in the community tend to be more involved in its governance and upkeep. Nowhere is this more true than the San Fernando Valley with an overall average ownership ratio four percentage points higher than that of Los Angeles County.

Another indicator of community engagement is the Valley's unusually high propensity for voter turnout, and a deserved reputation for activism.

In all, the majority of Valley communities would be considered suburban, with many in the process of transitioning to more urban and metropolitan lifestyles.

Housing & Rents

The San Fernando Valley, as defined, encompasses the cities of Burbank, Calabasas, Glendale, a portion of Los Angeles, San Fernando, and Hidden Hills, as well as unincorporated portions of the County of Los Angeles and the County of Ventura. All told, the subject area comprises 345.8 square miles.

LAND AREA OF THE SAN FERNANDO VALLEY

Square Miles

City	Land Area
Burbank	17.4
Calabasas	12.9
Glendale	30.6
Los Angeles - Valley	224.9
San Fernando	2.4
Hidden Hills	1.6
Chatsworth - Unincorporated Portion*	19.8
Tujunga - Unincorporated Portion*	25.2
Universal City - Unincorporated Portion*	0.5
West Hills - Unincorporated Portion*	10.5
S.F. Valley Totals	345.8
County of Los Angeles	4,083.7

Source: Economic Alliance of the San Fernando Valley, Claritas

Valleywide ratios of 52% owner-occupancy of detached single units exceeded Los Angeles County totals by 4% in 1990. San Fernando showed strength in this area with 59% owner-occupancy, exceeded only by Calabasas, an affluent area with 80% owner-occupancy. A correlation may exist between the ownership ratio and the fact that San Fernando and Calabasas also have substantially lower percentages of multi-family housing, at 19.8% and 16.5% respectively.

The highest percentage of multiple units was located in Glendale with 55% and Burbank with 46.4% compared to a Valleywide average of 42.5%

UNITS IN STRUCTURE - TOTAL

1990 Census, by SFV Zip Codes

City	1 Unit Detached	1 Unit Attached	2-4 Units	5-9 Units	10-19 Units	20-49 Units	50+ Units	Mobile Home and Other
Burbank	20,363	1,994	4,683	4,470	4,418	3,868	2,290	409
Calabasas Area	12,341	2,461	517	891	604	373	673	709
Glendale	30,716	3,232	6,967	10,782	11,024	10,015	3,621	729
Los Angeles - Valley	233,260	24,123	13,084	24,850	36,949	68,319	46,444	10,587
San Fernando	5,498	669	497	384	353	244	114	267
S.F. Valley Totals	302,178	32,479	25,748	41,377	53,348	82,819	53,142	12,701
County of Los Angeles	1,555,932	211,553	285,032	267,634	285,945	298,273	207,277	92,867

Source: Economic Alliance of the San Fernando Valley, Claritas

UNITS IN STRUCTURE - RENTERS

1990 Census, by SFV Zip Codes

City	Renter Occ 1 Unit Detached	Renter Occ 1 Unit Attached	Renter Occ 2-4 Units	Renter Occ 5-9 Units	Renter Occ 10-19 Units	Renter Occ 20-49 Units	Renter Occ 50+ Units	Renter Occ Mobile Home Other
Burbank	3,222	824	4,119	3,934	3,775	3,238	2,023	236
Calabasas Area	844	407	350	443	453	296	540	116
Glendale	4,995	1,769	5,900	9,788	9,611	7,754	2,396	331
Los Angeles - Valley	33,728	6,838	10,745	20,695	30,727	58,027	38,257	2,231
San Fernando	1,379	326	455	345	297	227	81	89
S.F. Valley Totals	44,168	10,164	21,569	35,205	44,863	69,542	43,297	3,003
County of Los Angeles	310,604	101,651	235,325	230,445	244,664	250,153	164,555	24,357

Source: Economic Alliance of the San Fernando Valley, Claritas

GROSS RENT - 1990

1990 Census - Renter Occupied Housing Units, by SFV Zip Codes

Note: Totals comprise average of medians

City	Units Gross Rent Under \$200	Units Gross Rent \$200-299	Units Gross Rent \$300-399	Units Gross Rent \$400-499	Units Gross Rent \$500-599	Units Gross Rent \$600-749	Units Gross Rent \$750-999	Units Gross Rent \$1000+	Units No Rent	Median Gross Rent
Burbank	352	394	662	1,793	4,023	6,038	5,842	1,983	257	600
Calabasas Area	53	43	33	34	125	416	1,256	1,379	75	942
Glendale	341	437	1,227	3,858	7,409	12,282	12,641	3,579	565	714
Los Angeles - Valley	3,904	3,560	6,950	17,938	36,983	53,683	48,167	26,639	3,002	677
San Fernando	86	164	223	528	630	606	613	274	62	590
S.F. Valley Totals	4,736	4,598	9,095	24,151	49,170	73,025	68,519	33,854	3,961	684
County of Los Angeles	41,913	56,602	113,105	205,459	276,284	371,573	315,675	151,749	22,222	662

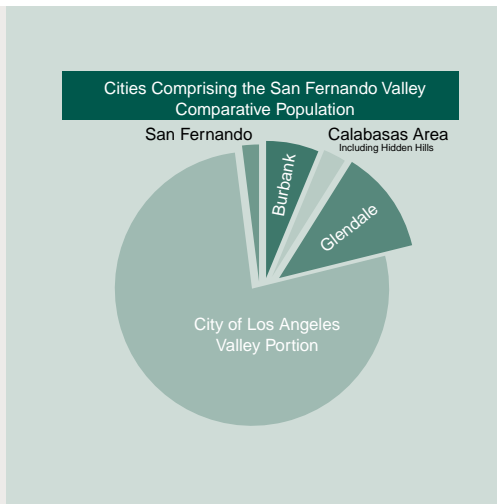
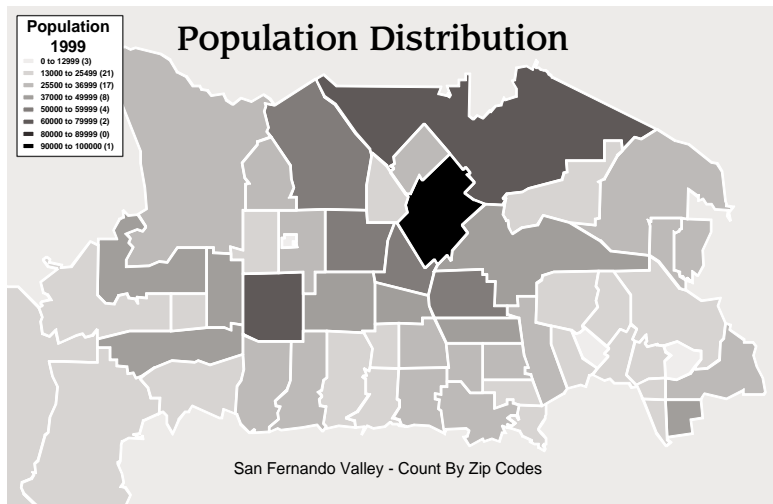
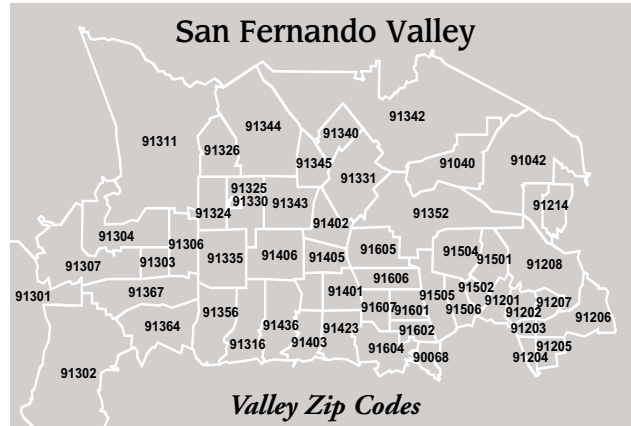
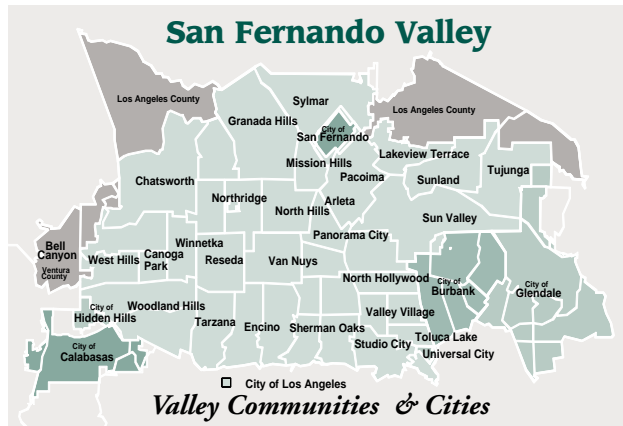
Source: Economic Alliance of the San Fernando Valley, Claritas

Population Data

Population in the Fernando Valley increased moderately between 1990 and 1999, finishing out the decade with an estimated population of 1,680,547. It is anticipated that the population will grow to 1,763,013 by the year 2004.

While much of the growth is being fueled by immigration, a substantial portion is attributable to area births, and an overall increase in the number of school-aged children.

Much of the potential population growth is being dampened by limited availability of residential property, as the residential capacity of the area approaches being built-out. In fill projects and several remaining planned developments are expected to provide a moderate increase in housing over the next decade.



POPULATION & GROWTH - SAN FERNANDO VALLEY 1990 1999 2004

Census, Estimates, Projections, by SFV Zip Codes

	Population by Zip Codes 1990	Population by Zip Codes 1999	Population by Zip Codes 2004	Avg Pop Growth 1990>1999	Avg Pop Growth 1999>2004
Burbank	95,711	104,641	110,258	8.8%	4.7%
Calabasas Area	39,556	45,162	48,345	14.2%	7.1%
Glendale	191,208	205,474	215,215	7.1%	4.6%
Los Angeles - Valley	1,208,189	1,291,831	1,354,139	5.9%	4.4%
San Fernando	31,027	33,439	35,056	7.8%	4.8%
S.F. Valley Totals	1,565,691	1,680,547	1,763,013	6.7%	4.6%
Los Angeles County	8,981,462	9,515,551	9,923,267	6.8%	4.2%

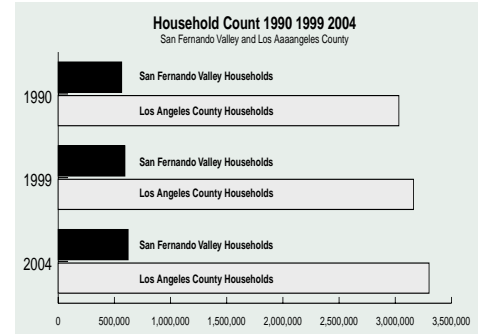
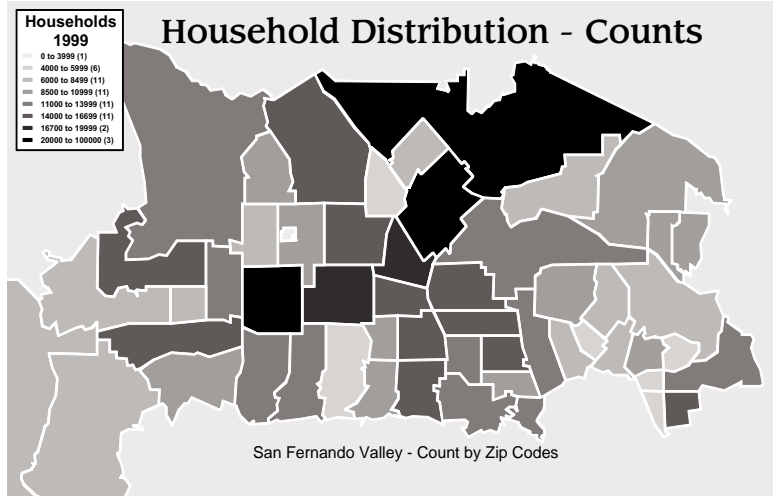
Source: Economic Alliance of the San Fernando Valley, Claritas



Households

As with the population in general, the number of households in the Valley has been rising consistently. To some extent, the increases have been more rapid than the expansion of housing stock to accommodate the growth. This is accounted for in part by the development of “shadow housing,” or second units on single family sites. It has become commonplace to convert attached garages into living quarters in some of the smaller footprint tract housing models. This was originally seen as a way to add 400-500 square feet to a house, and provide a family room or additional bedroom for children.

To the extent they comprise a second housing unit, most are created without the approval of the building authorities, Detached facilities, commonly called “granny flats,” are more likely to be configured as a housing unit, and are commonly rented-out to non-family members, used for guest rooms, as quarters for aging relatives or as shared space for the extended family.



HOUSEHOLDS COUNT 1990 1999 2004				
Census, Estimates, Projections - by SFV Zip Codes				
City	Households 1990	Households 1999	Households 2004	Proj % Growth HHs 1999 > 2004
Burbank	39,877	42,559	44,774	4.4 %
Calabasas Area	14,272	16,129	17,315	7.4 %
Glendale	72,493	76,468	80,147	4.5 %
Los Angeles - Valley	430,779	450,749	471,929	4.5 %
San Fernando	7,618	8,044	8,429	4.8 %
S.F. Valley Totals	565,039	593,949	622,594	4.6 %
Los Angeles County	3,032,013	3,161,821	3,300,826	4.3 %

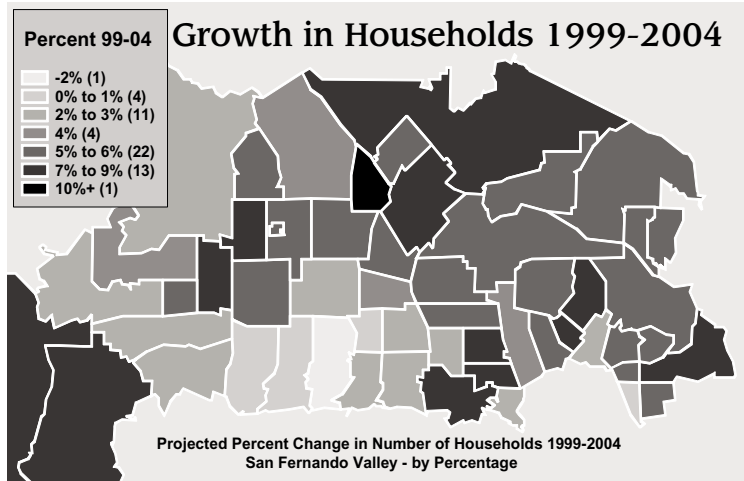
Source: Economic Alliance of the San Fernando Valley

This phenomena is very common to first and second generation immigrant families, who may be more accustomed to the kind of compact housing and generational blending common in their country of origin.

In the emerging culture, the notion of providing modest housing for the young family of a son or daughter, or of caring for an aging parent, is quite prevalent.

In other cases, after the children have grown-up and left the family home, the owner will rent the extra space as a source of additional income. In any case, it creates challenges for census, planning and building officials, since residents are reluctant to reveal or admit to unpermitted housing and tenancies.

In the Valley, the higher densities of households may be attributed to concentrations of apartments in the central, northeast, and central south. But judging by current trends, and despite a resistance to planned densification, projected growth and demand will likely be accommodated by added densification of single family neighborhoods.





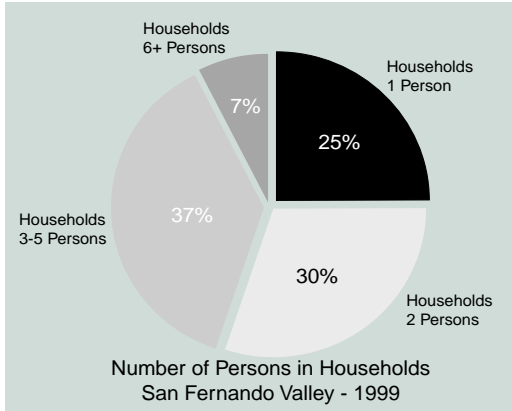
Families

FAMILIES - 1990 1999 2004

Census, Estimates, Projections - Number of Families, by SFV Zip Codes

	Families 1990	Families 1999	Families 2004	% of 1999 HH with Families	% Growth Families to 2004
Burbank	23,918	24,983	25,961	47.1%	3.6%
Calabasas Area	10,742	11,827	12,521	73.3%	5.9%
Glendale	48,016	49,432	51,119	65.0%	3.2%
Los Angeles - Valley	284,754	291,068	300,958	61.8%	3.2%
San Fernando	6,224	6,431	6,656	80.0%	3.5%
S.F. Valley Totals	373,654	383,741	397,215	61.7%	3.3%
Los Angeles County	2,045,516	2,085,294	2,149,444	65.8%	2.9%

Source: Economic Alliance of the San Fernando Valley



HOUSEHOLDS BY FAMILY TYPE PRESENCE AND AGE OF CHILDREN

1990 Census, by SFV Zip Codes

	Married Couples w/Related Children	Married Couples No Related Children	Other Families w/Related Children	Other Families No Related Children	Nonfamily Households
Burbank	8,324	10,290	2,968	2,973	15,932
Calabasas Area	6,112	5,039	1,053	690	3,905
Glendale	19,025	19,144	5,088	5,935	24,296
Los Angeles - Valley	112,015	112,151	35,691	29,562	144,574
San Fernando	3,280	1,539	1,123	489	1,329
S.F. Valley Totals	148,756	148,163	45,923	39,649	190,036
County of Los Angeles	820,774	694,085	329,652	220,769	968,048

Source: Economic Alliance of the San Fernando Valley, Claritas

The differentials in family size continue to grow, with general increases in the largest families in the lower income, less educated portions of the Valley. Seven percent of Valleywide households have six or more members, compared to 10% countywide.

San Fernando has the highest number of households with six or more members at 24%, and the lowest number of single householders at 14%. Similar ratios appear in the Sylmar, Lakeview Terrace and Pacoima portions of the City of Los Angeles.

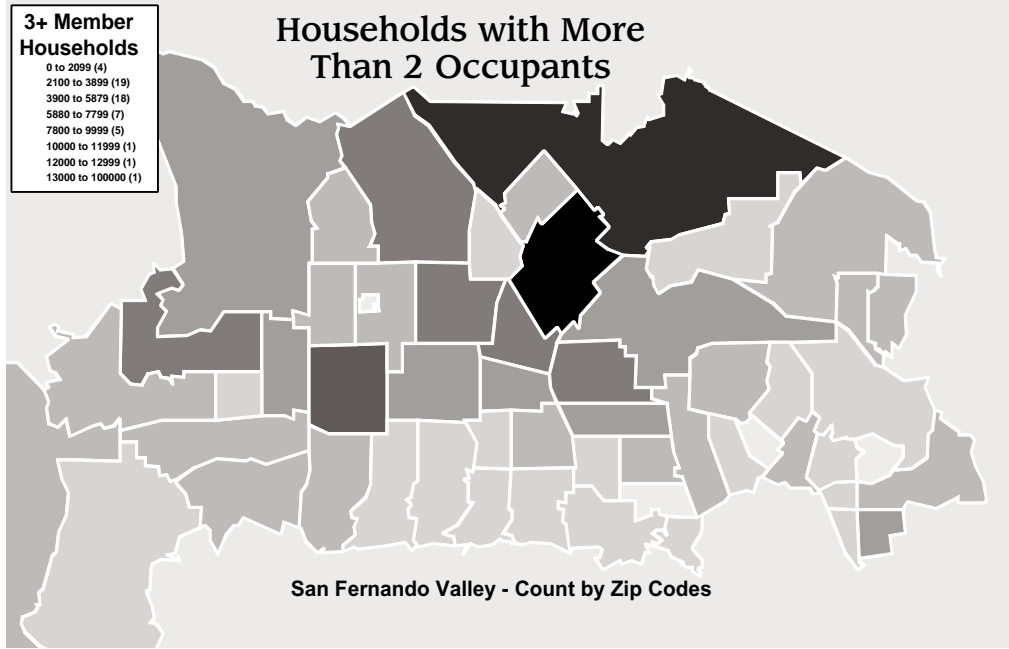
Calabasas trails in the largest family category, but leads by a 10% margin in the mid-size, 2-5 member households group. Burbank has the highest ratio of single householders at 31% compared to a countywide rate of 24%.

PERSONS IN HOUSEHOLDS - 1999

1999 Estimates based on 1990 Census - Counts by SFV Zip Codes

City	Households 1 Person	%	Households 2 Persons	%	Households 3-5 Persons	%	Households 6+ Persons	%	Total Households	%
Burbank	13,036	31%	13,841	33%	14,010	33%	1,672	4%	42,559	100%
Calabasas Area	2,957	18%	5,072	31%	7,565	47%	535	3%	16,129	100%
Glendale	20,340	27%	23,040	30%	29,126	38%	3,962	5%	76,468	100%
Los Angeles - Valley	110,722	25%	135,704	30%	168,141	37%	36,182	8%	450,749	100%
San Fernando	1,112	14%	1,547	19%	3,433	43%	1,952	24%	8,044	100%
S.F. Valley Totals	148,167	25%	179,204	30%	222,275	37%	44,303	7%	593,949	100%
Los Angeles County	769,642	24%	872,759	28%	1,209,724	38%	309,696	10%	3,161,821	100%

Source: Economic Alliance of the San Fernando Valley, Claritas



Apartments Condominiums

Multi-unit housing provides numerous benefits for occupants by facilitating shared resources, common areas, and pooled amenities. Because apartments and condominiums are able to provide increased housing capacity in dramatically reduced “footprints,” they narrow commute patterns, and can reduce the need for public and private services. Many contend that such units promote the “smart growth” goals of promoting open spaces through the consolidation of residential occupation.

In practice, multi-unit housing has had mixed results. Manhattan-style high-end

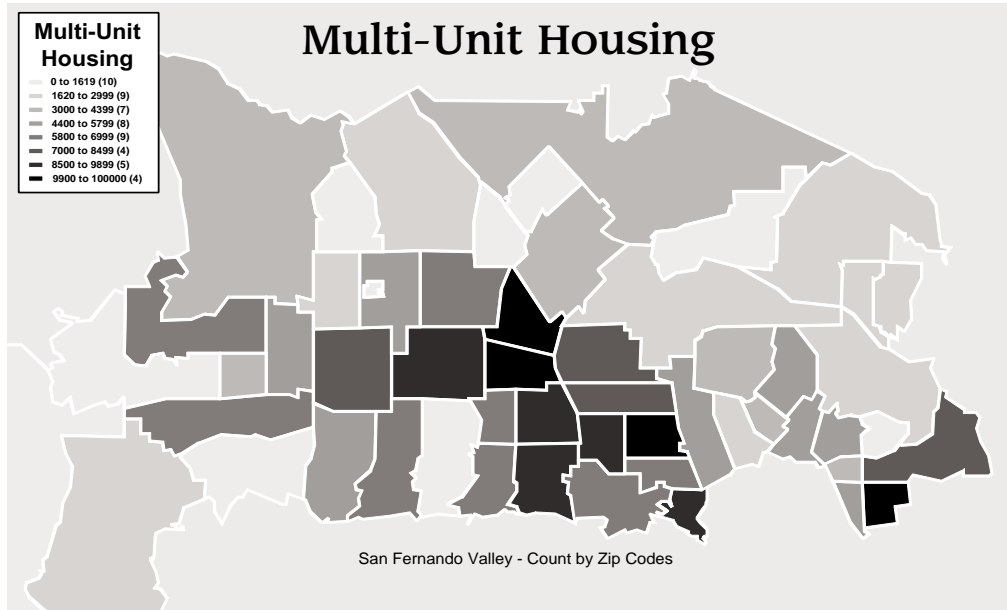
housing, condominiums and dedicated seniors projects have generally been able to offer reasonable quality-of-life standards. On the other hand, in demographically transitional areas, multi-unit complexes have frequently resulted in crime, graffiti, and a significant reduction in the area's quality of life.

With the growth of zero-lot-line housing, townhomes, and condominiums, the model has changed. Because land is at a premium in the region, developers promote amenities over space. Subdivisions are routinely designed with minimum lot sizes, and reduced setbacks.

Multi-level developments compound the densification effects of subdivision, but are somewhat limited by local height restrictions.

Even in the single family residence market, it has become quite common to subdivide the large rural lots of the 1930s and 1940s into “pocket” subdivisions.

Whether inspired by preference or by need, multi-unit housing is a staple in most communities. Rentals generally provide mid-term accommodations for the young and for seniors seeking a simpler lifestyle.



SINGLE UNIT AND MULTI-UNIT RESIDENCE COUNTS

1990 Census

Counts	One Unit	Multi-Unit	One Unit	Multi-Unit	One Unit	Multi-Unit
	Total	Total	Ownr-Occ	Ownr-Occ	Rental	Rental
Burbank	22766	19729	18484	2640	4282	17089
Calabasas Area	15511	3058	14144	976	1367	2082
Glendale	34677	42409	27582	6960	7095	35449
Los Angeles - Valley	267970	189646	225173	31195	42797	158451
San Fernando	6434	1592	4640	187	1794	1405
S.F. Valley Totals	347358	256434	290023	41958	57335	214476
County of Los Angeles	1860352	1344161	1423740	219019	436612	1125142

Source: Economic Alliance of the San Fernando Valley, Claritas

SINGLE UNIT TO MULTI-UNIT RESIDENCE RATIOS

1990 Census

Ratios	One Unit	Multi-Unit	One Unit	Multi-Unit	One Unit	Multi-Unit
	Total	Total	Ownr-Occ	Ownr-Occ	Rental	Rental
Burbank	53.6%	46.4%	87.5%	12.5%	20.0%	80.0%
Calabasas Area	83.5%	16.5%	93.5%	6.5%	39.6%	60.4%
Glendale	45.0%	55.0%	79.9%	20.1%	16.7%	83.3%
Los Angeles - Valley	58.6%	41.4%	87.8%	12.2%	21.3%	78.7%
San Fernando	80.2%	19.8%	96.1%	3.9%	56.1%	43.9%
S.F. Valley Totals	57.5%	42.5%	87.4%	12.6%	21.1%	78.9%
County of Los Angeles	58.1%	41.9%	86.7%	13.3%	28.0%	72.0%

Source: Economic Alliance of the San Fernando Valley, Claritas

Age & Language

Language For many Los Angeles area residents, English is not the primary language, or is not spoken at all. Except for the City of San Fernando, the Valley generally ranks lower than the County of Los Angeles (8.4% vs. 10.2%) in population speaking English as a second language. Calabasas, at 1.2% has a negligible share of this population. This has resulted in some controversy within the public education system, and ultimately the elimination of traditional “bi-lingual” education programs. New solutions are being sought to resolve literacy issues in light of the significance of this population, and the pressing need for communication in employment, education, and social interaction.

Age The Valleywide median age increased dramatically from 32 years in 1990 to 36.1 years in 1999. This 1.4% average annual rate is expected to decelerate to about 1% through 2004, and may be an indicator of improved residential stability.

Many of the traditional, older neighborhoods and tracts still provide housing for “empty-nesters” and retirees.

South of Ventura Boulevard, this group is supplemented by a newer group of residents sufficiently wealthy to afford this sought-after housing. Some of the more affluent areas have seen home prices soar over the last twenty years. This has resulted in an older, more affluent resident base.

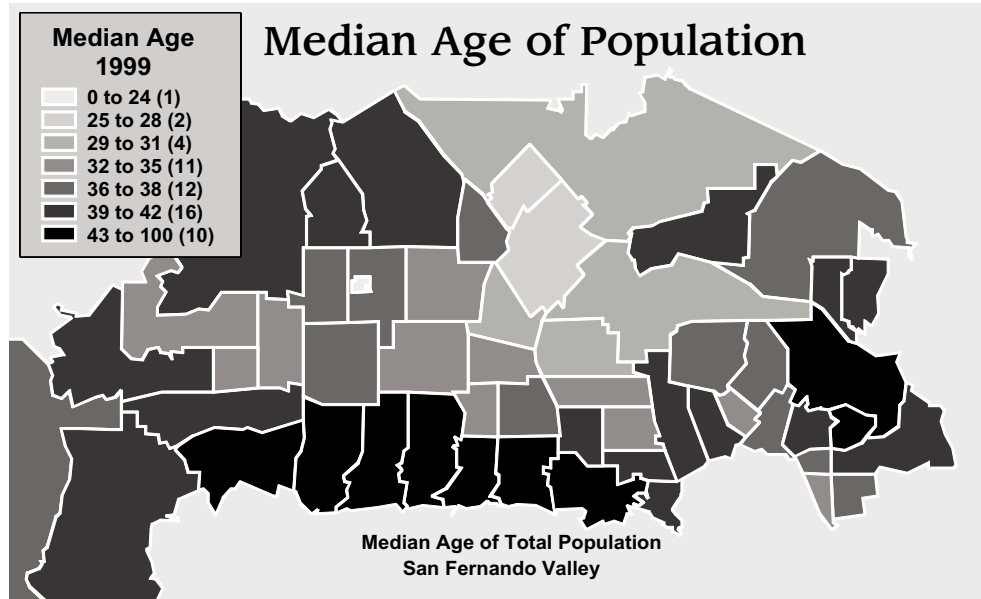
Young families and entry level employees tend to cluster in areas such as the central and northeast, where the housing more affordable, and ownership can become a reality.

LANGUAGE SPOKEN AT HOME - OTHER THAN ENGLISH

1990 Population Speaking English Not Well or Not at All - By Language, by SFV Zip Codes

City	Spanish	% of Pop	Asian Pacific	% of Pop	Other	% of Pop
Burbank	4,456	5.26%	913	0.96%	1,426	1.74%
Calabasas	561	1.18%	254	0.58%	203	0.42%
Glendale	8,783	4.38%	4,479	2.24%	13,268	6.29%
Los Angeles - Valley	108,531	7.23%	11,284	0.87%	12,688	1.04%
San Fernando	7,765	24.12%	33	0.10%	29	0.09%
Valley Totals	130,096	8.43%	16,963	0.95%	27,614	1.92%
County of Los Angeles	918,188	10.24%	173,130	1.93%	68,631	0.77%

Source: Economic Alliance of the San Fernando Valley, Claritas



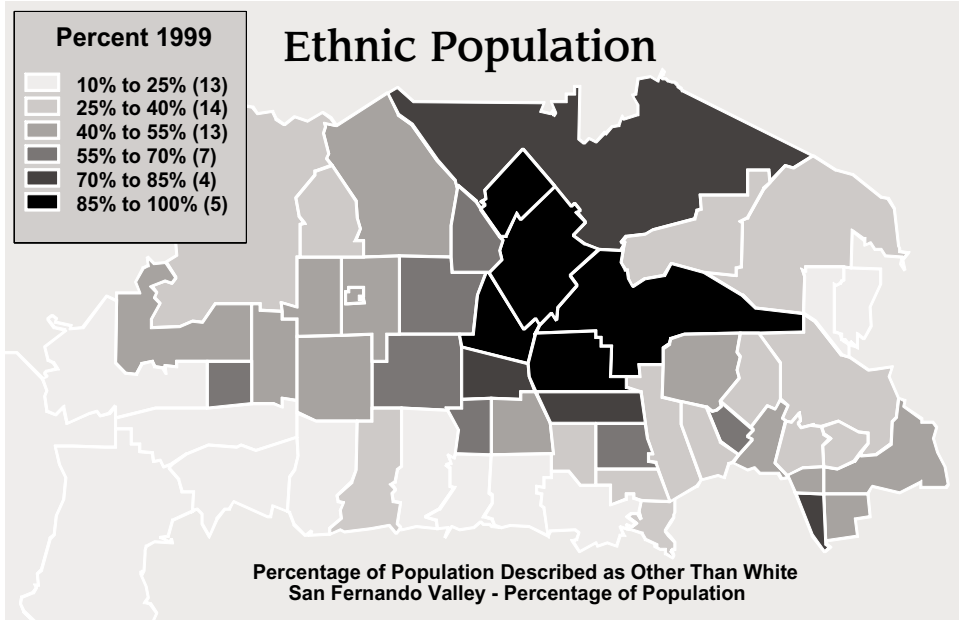
MEDIAN AGE - 1990 1999 2004

Census, Estimates, Projections, by SFV Zip Code - Note: Includes Average of Medians

City	Median Age	Median Age	Median Age	Median Age	Median Age	Median Age	Median Age	Median Age	Median Age
	Total Pop	Male Pop	Female Pop	Total Pop	Male Pop	Female Pop	Total Pop	Male Pop	Female Pop
	1990	1990	1990	1999	1999	1999	2004	2004	2004
Burbank	27.4	26.6	28.3	31.0	30.0	32.0	32.5	31.6	33.3
Calabasas Area	35.4	35.2	35.6	39.6	38.9	40.3	41.6	40.3	42.7
Glendale	35.0	33.8	36.2	39.5	38.2	40.8	41.8	40.3	43.2
Los Angeles - Valley	31.8	31.1	32.7	36.0	35.1	36.9	38.0	37.0	38.9
San Fernando	26.0	25.3	26.8	25.9	25.9	25.9	24.9	25.2	24.6
S.F. Valley Totals	32.0	31.1	32.9	36.1	35.1	37.1	38.0	37.0	39.0
Los Angeles County	32.0	31.1	33.0	35.3	34.3	36.5	37.0	35.7	38.2

Source: Economic Alliance of the San Fernando Valley, Claritas

Diversity



RACE - 1999

Estimates, by SFV Zip Codes

City	White	Black	Am Indian Eskimo Aleut	Asian Pacific	Other	Hispanic
Burbank	61,063	1,998	421	8,779	170	32,210
Calabasas Area	37,733	563	109	3,589	30	3,138
Glendale	117,369	2,712	457	35,353	420	49,163
Los Angeles - Valley	584,707	52,781	3,243	119,466	3,071	528,563
San Fernando	2,062	785	52	541	132	29,867
S.F. Valley Totals	802,934	58,839	4,282	167,728	3,823	642,941
Los Angeles County	3,179,611	892,785	22,933	1,122,825	25,891	4,271,506

Source: Economic Alliance of the San Fernando Valley, Claritas

RACE - 1990

Census 1990, by SFV Zip Codes

City	White	Black	Am Indian Eskimo Aleut	Asian Pacific	Other	Hispanic
Burbank	66,949	1,585	418	6,281	143	21,714
Calabasas Area	40,859	583	130	3,020	33	2,989
Glendale	125,472	2,299	509	26,363	341	38,960
Los Angeles - Valley	697,389	45,304	4,009	91,489	2,535	373,110
San Fernando	4,691	1,175	93	430	104	25,704
S.F. Valley Totals	935,360	50,946	5,159	127,583	3,156	462,477
County of Los Angeles	3,698,145	935,649	29,622	912,406	21,465	3,373,665

Source: Economic Alliance of the San Fernando Valley, Claritas

CHANGES IN RACIAL COMPOSITION 1990 > 1999

Percentages Based on Census and Estimates, by SFV Zip Codes

City	White	Black	Am Indian Eskimo Aleut	Asian Pacific	Other	Hispanic
Burbank	-8.8%	26.1%	0.7%	39.8%	18.9%	48.3%
Calabasas Area	-7.7%	-3.4%	-16.2%	18.8%	-9.1%	5.0%
Glendale	-6.5%	18.0%	-10.2%	34.1%	23.2%	26.2%
Los Angeles - Valley	-16.2%	16.5%	-19.1%	30.6%	21.1%	41.7%
San Fernando	-56.0%	-33.2%	-44.1%	25.8%	26.9%	16.2%
S.F. Valley Totals	-14.2%	15.5%	-17.0%	31.5%	21.1%	39.0%
County of Los Angeles	-14.0%	-4.6%	-22.6%	23.1%	20.6%	26.6%

Source: Economic Alliance of the San Fernando Valley, Claritas

Diversity has provided unique challenges and opportunities to Southern California over the last several decades. With a growing immigrant population, the area has had to make adjustments in culture, governance, and education, to accommodate dozens of significant constituencies. The San Fernando Valley has made notable progress in assimilating a large number of immigrants, and has enjoyed the benefit of new cultures, specialized skills, and a ready workforce.

The 1990s have seen a dramatic 39% increase in Hispanic population Valleywide, while Asians increased their numbers 31%. Black population increased 15% and Native Americans actually decreased by 17%, exceeding the 14% decrease in White population.

The upward mobility of immigrants and minorities is demonstrated by substantial representation in the relatively wealthy south Valley communities of Sherman Oaks, Encino, Tarzana, Woodland Hills, and Calabasas. There are no areas with less than 10% non-white population, with 20%+ being more common.

Likewise, the demands and opportunities of industry and new housing have brought substantial minority populations to the north Valley communities of Chatsworth, Northridge, and Granada Hills.

As the economy continues to grow, and demand for Valley-based goods and services increases, the area will continue to be an attraction. The Valley ranks high in attributes such as jobs, housing, climate, and opportunity.

Education and Achievement

At the end of WWII, the Valley provided a ready supply of sunshine and housing to returning veterans. With burgeoning aeronautics and aerospace industries, it became a bastion of technology and engineering. Companies such as Rockwell, Rock-etyne, ITT, Lockheed, Litton and Atomics International placed the Valley at the center of the “Space Race” and in a pioneering role in the evolution of computer and entertainment technologies. This has led to the development of a vast pool of technology-savvy employees, along with institutions such as Cal Tech, that continue

to provide a ready supply of skilled employees and innovators.

One-third of Valley residents have a college degree, with another 22% having attended college. Of the remaining 44% approximately half have not completed high school.

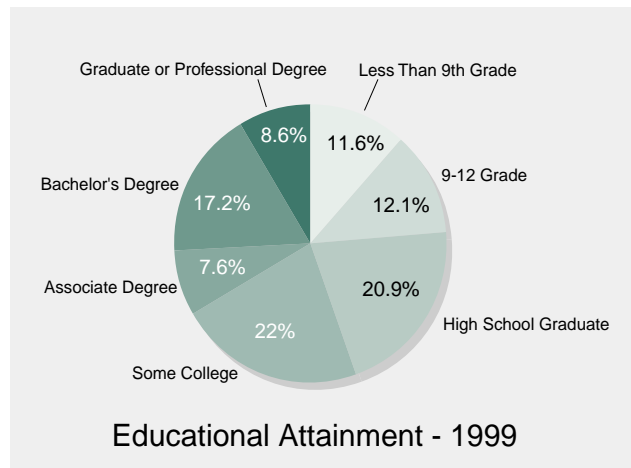
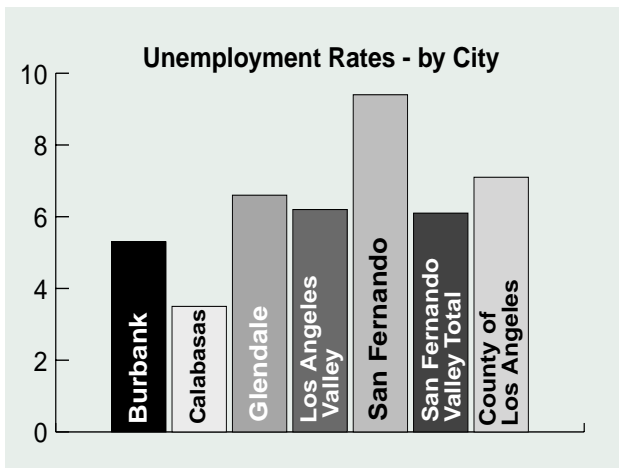
The lowest unemployment rates tend to track the more affluent, better-educated population segments, such as Calabasas. Burbank’s lower than average unemployment is due in part to the substantial employment demands of entertainment and its support industries.

EDUCATIONAL ATTAINMENT - 1999

1999 Estimates based on 1990 census - Pop 25+, Years of School Completed, by SFV Zip Codes

City	Completed < 9th Grade	Completed 9-12 Grade	High School Graduate	Completed Some College	Associate Degree	Bachelor's Degree	Graduate or Professional Degree
Burbank	6,547	9,102	17,434	19,219	6,145	12,522	4,748
Calabasas Area	488	1,638	4,689	7,809	2,213	8,675	5,389
Glendale	16,015	16,000	29,191	30,833	11,411	28,358	14,133
Los Angeles - Valley	102,238	107,032	182,456	189,824	66,207	145,515	72,884
San Fernando	6,192	3,954	3,201	2,126	707	706	340
S.F. Valley Totals	131,480	137,726	236,971	249,811	86,683	195,776	97,494
Los Angeles County	896,484	856,968	1,262,427	1,210,828	451,285	898,842	486,500

Source: Economic Alliance of the San Fernando Valley, Claritas



“...placed the Valley at the center of the ‘Space Race’...”

EMPLOYMENT STATUS - 1999

1999 Estimates based on 1990 Census Data, by SFV Zip Codes

	Pop 16+ in Armed Forces	Pop 16+ In Labor Force Employed	Pop 16+ in Labor Force Unemployed	Pop 16+ Not in Labor Force
Burbank	48	55,481	3,089	26,350
Calabasas Area	16	24,830	900	10,067
Glendale	126	100,415	7,124	57,447
Los Angeles - Valley	659	671,113	44,221	284,932
San Fernando	12	13,554	1,404	7,332
S.F. Valley Totals	861	865,393	56,738	386,128
Los Angeles County	12,593	4,487,526	346,308	2,342,442

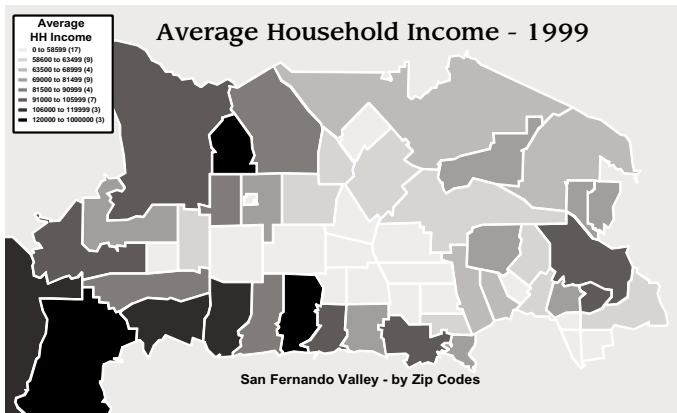
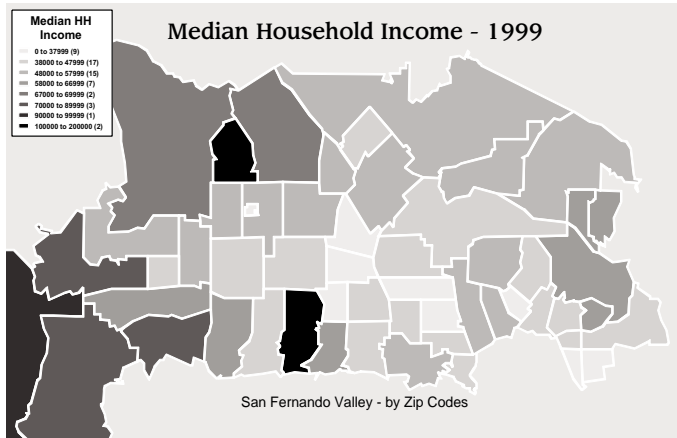
Source: Economic Alliance of the San Fernando Valley, Claritas



INCOME BASICS - 1990 1999 2004								
Estimates, Projections, by SFV Zip Codes, Includes Average of Medians								
City	Per Capita Income 1999	Per Capita Income 2004	Per Capita Income % Growth 1999>2004	1989 Median HH Income	1999 Median HH Income	2004 Median HH Income	Median HH Inc % Growth 1999>2004	1999 Average HH Income
Burbank	19,440	21,171	7.2%	28,806	36,593	37,136	1.2%	47,738
Calabasas Area	48,849	57,810	18.4%	68,283	89,951	104,140	15.8%	135,307
Glendale	25,616	28,703	11.8%	38,518	46,875	48,483	2.9%	67,499
Los Angeles - Valley	26,842	30,170	11.9%	41,261	51,265	54,767	5.3%	72,688
San Fernando	12,802	15,424	20.5%	33,040	41,003	44,336	813.0%	53,176
S.F. Valley Totals	26,507	29,843	11.9%	40,499	50,418	53,723	5.0%	71,471
Los Angeles County	24,810	28,127	13.7%	39,095	49,495	53,701	6.6%	68,519

Source: Economic Alliance of the San Fernando Valley, Claritas

“today’s newcomers stop only briefly, if at all, in the inner cities . . .”



Income data in the San Fernando Valley has been dramatically affected by transitions in job categories from aerospace, which relies heavily on engineering talent and mainframe computers, to entertainment and new media technologies, which are more oriented to creative-tech talents such as computer animation, post-production, and Internet content development.

While job categories have been shifting, large segments of the central Valley population have also changed from educated middle-class to a new group which tends to be less educated, employed in lower paying service occupations, and are frequently non-English-speaking, first generation immigrants.

Although figures in some Zip Codes may show widening gaps in incomes, or increases in poverty level households, it is often the result of comparing current residents with prior residents who have since migrated to the outer suburban rings of the area.

When asked if they were “financially better off or worse off today than they were five years ago,” a remarkable 83% of Valley residents said they were the same or better off. It is worth noting that much of this new population comes from “third-world” or agrarian cultures, and are only beginning to climb educational, income and career ladders.

OCCUPATION - 1999						
1999 Estimates Based on 1990 Census Data, by SFV Zip Codes						
City	Exec Admin Mgr Prof	Tech Sales Admin	Priv Household Service	Farm Forestry Fishing	Precision Prod Crafts Repair	Mach Op Assem Inspect Trans Labor
Burbank	17,450	20,629	5,279	364	5,749	6,010
Calabasas Area	11,292	9,195	1,879	172	1,429	863
Glendale	34,009	38,076	9,352	879	9,353	8,746
Los Angeles - Valley	201,797	229,019	71,731	9,342	76,292	82,932
San Fernando	1,510	3,436	1,556	361	2,450	4,241
S.F. Valley Totals	266,058	300,355	89,797	11,118	95,273	102,792
Los Angeles County	1,262,314	1,466,567	537,259	54,866	492,165	674,355

Source: Economic Alliance of the San Fernando Valley, Claritas

The income gap can be observed by comparing median income with average income, which is a ratio of 71% in the San Fernando Valley; compared to Santa Clara County which dropped from 70% to 60% between 1987 and 1997.





Continued from Page 14

Yet as the Valley has grown, many of the things that attracted the first wave of settlers, both residential and corporate, have changed dramatically. Growth turned an expanse of cheap land and houses into an expensive one. A low-density environment --- people now in their forties can still recall riding their horses through vast expanses --- has become crowded not only with homes, but apartments. Freeways which once seemed like magic thoroughways to the rest of the basin are now among the most congested in the nation.

As a result, today many Valley residents are clearly dissatisfied with the region. By the end of the 1990s, according to a recent Los Angeles Times poll, only 13% of residents considered the area an "excellent place" to live and only 9% considered it a good place to raise children. Perhaps most disturbingly, despite a strong economy, nearly twice as many believed life in their community had gotten worse than those who thought it had gotten better. Significantly, these disapproving numbers were considerably higher than those recorded by other "suburban" areas including Orange County, the San Gabriel Valley and neighboring Ventura.

Some of this alienation, particularly for the City of Los Angeles portions of the region, can be traced to a sense of political impotence. Even as independent cities such as Burbank and Glendale remained attractive to entrepreneurs and corporations --- even during the deep recession of the early 1990s, the majority of Valley residents, residing in the city of Los Angeles, paid a stiff price for being linked to downtown's increasingly bloated political bureaucracy, who continued adding extra layers of costs and regulatory restraints on firms. One result was that the L.A. portion of the Valley, like the rest of the city, was slow to recover from the recession and has generally lagged the smaller, independent cities.

Finally, there was a dramatic change in the nature of Valley residents. Once a recipient of white flight from over the hill, the Valley now experienced its own out-migration, some of it to other states and some to surrounding areas. The white population of the Valley, for example, dropped by over 130,000, more than ten percent, between 1990 and 1998.

In their place has come a largely immigrant community who, much like the original settlers, migrated in search of a better quality of life and economic opportu-

Leisure Activities At Griffith Park one can ride the vintage merry-go-round, hike, bike, ride horses or a miniature steam train; tour the Travel Town train museum or the Autry Museum of Western Heritage, play golf or visit the Los Angeles Zoo. And on the park's south side are the Griffith Observatory and the Greek Theater outdoor concert venue.

Shopping is available in major malls such as the Glendale Galleria, Burbank's Media City Center, Northridge Plaza, Sherman Oaks Fashion Plaza or the Woodland Hills malls along Topanga Canyon Boulevard -- or enjoy one of the hundreds of shops along the Valley's own Main Street, Ventura Boulevard.

You can hike among sylvan woodlands in the mountains ringing the Valley, including the Santa Monica Mountains, the Angeles National Forest and the Santa Susanna Mountains. The Sepulveda Basin features golf, soccer and softball fields, basketball courts, playgrounds and a substantial wildlife refuge. For high culture, there's the world-renowned Getty Museum.

Action spots include Universal Studios Hollywood, CityWalk or a major concert at the Universal Amphitheater. Nearby is Hollywood Bowl and the John Anson Ford Amphitheater.

One can tour of the production facilities at Universal Studios or Warner Bros., or watch a taping of a television show by favorites such as Jay Leno's Tonight Show at NBC.

Nearby are the Museum of Contemporary Art, the County Museum of Art, the Norton Simon Museum and the Huntington Library.

nity. In the 1950s the Valley was roughly 99% white; three decades later it was already 44% minority, with Latinos representing nearly one-third the total population. By 1997, according to County estimates, Latinos accounted for roughly 40% of the Valley population, while Asians account for another 10%.

This reflects both the "suburban" aspirations, as well as family orientation, of many immigrants. In contrast to the early 20th Century immigrant, many of today's newcomers stop only briefly, if at all, in the inner cities; their immediate destination after arrival is as likely Encino or Reseda as Fairfax or east Los Angeles. "The immigrants often don't bother with the inner city anymore," notes Cal State University Northridge demographer James Allen.

Yet sadly, not all Valley residents welcome such changes. For some, ethnic change also means the loss of long-cherished businesses, as ethnically-oriented shops take their place, and raises the prospect of such things as gangs in their communities. Also, the movement of a large population of poorer, non-English speaking children has put additional burdens on local schools, threatening the perceived quality of education for many traditional middle class residents.



Endnotes Methodology

The San Fernando Valley Almanac has been developed through the efforts of dozens of participants. The James Irvine Foundation has generously provided funding and played a pivotal role in allowing for its creation.

The James Irvine Foundation has also provided invaluable networking and insights through its Civic Entrepreneur and Community Indicators initiatives. An important focus of the foundation has been to promote the concept of "regionalism" in the State of California. Regionalism involves practical collaboration among communities that are bound by common interests -- seeking to avoid the historic limitations of political boundaries.

This publication is a step to the realization of the "Valley Information Project" -- a core initiative of the Economic Alliance of the San Fernando Valley. The goal of the initiative is the collection, maintenance and dissemination of information and statistics relating to the geographic San Fernando Valley.

Prior to 1994, descriptive Valley information was only made available on a very limited basis. In part this was due to the historical boundaries of the cities of Burbank, Calabasas, Glendale, Los Angeles, Hidden Hills, San Fernando, and Los Angeles. But the more difficult challenge was isolating information for the San Fernando Valley portion of the City of Los Angeles, an area historically aggregated with the entire City of Los Angeles and with Census Tracts as distant as 45 miles from one another. Added difficulties were presented by the fact that portions of the Valley are comprised of unincorporated areas of Los Angeles County, and in small part Ventura County.

METHODOLOGY

San Fernando Valley Defined - For purposes of the Valley Information Project the advisory panel reached consensus on the following description: The entire City of Burbank, City of Calabasas, City of Glendale, and City of San Fernando; a portion of the City of Los Angeles described below (SFV Statistical area as adjusted), a portion of unincorporated Los Angeles County which is also a portion of Universal City; and for limited purposes, the entire City of Hidden Hills, where reliable data is readily available, and portions of the County of Ventura in the areas of Bell Canyon (Zip Code 91307) and Chatsworth (91304) as well as portions of the County of Los Angeles lying physically within the San Fernando Valley, Chatsworth (91311), Tujunga (91342 and 91042), where reliable data is readily available.

The study area includes the area set forth in California Government Code, section 11093, (brackets added) as follows:

(c) For purposes of this section, the San Fernando Valley is all the portion of Los Angeles City that is described as follows: From a point commencing where the City of Los Angeles most northerly boundary intersects with the Golden State Freeway and following on the city boundary in an easterly direction where such boundary first intersects with the boundary of the City of Burbank; thence continuing southeasterly along the Burbank City boundary to its intersection with Barham Boulevard; thence in a southerly direction on Barham Boulevard to its intersection with Cabuenga Boulevard; thence in a southeasterly direction on Cabuenga Boulevard to Mulholland Drive; thence along Mulholland Drive to [Owen Brown Rd., then south to] the Los Angeles City boundary; thence following the Los Angeles City boundary west and northerly until such boundary intersects with the starting point at the Golden State Freeway.

In determining the boundaries of the geographic San Fernando Valley for purposes of the Valley Information Project, the primary assumption of inclusion is that area lying generally within the San Fernando Valley watershed, based generally upon the surrounding mountain ranges.

San Fernando Valley Zip Codes - There are only two types of subarea denominators from which it is possible to aggregated data and information relating to the San Fernando Valley -- Zip Codes and Census Tracts. Zip codes are commonly found in more datasets than census tracts, thus allowing more types of analysis and

is supported by GIS systems.

However, because ZIP Codes are established for the distribution of mail, they generally do not follow political or Census area boundaries. Thus, certain data, which are developed by Zip Code areas, Census Tracts or Metropolitan Statistical Areas, may not coincide either temporally or spatially. Zip Code configurations can change from time to time, and statistical conclusions based upon them may be affected.

Additionally Zip Codes do not follow Census geographies, it is possible for a Zip Code to fall into two or more geographies such as spanning two cities or counties.

General - For purposes of this publication a small business is defined as one with less than 100 employees.

Unless otherwise stated, all dollar amounts are unadjusted. Where original data sources failed to sum properly, and backup was not readily available, the variances were preserved.

Page 5 - **Cities of the San Fernando Valley** - Population Remaining Portions are Located in the City of Los Angeles. Source: Area Size Square Miles, Economic Alliance of the San Fernando Valley, SFV Places Geofiles; 1998 Population, Burbank, Glendale, San Fernando, Claritas, Population Estimates, by SFV Zip Codes; 1998 Population, Calabasas, Hidden Hills, Los Angeles City, Los Angeles County, Population Estimates Program, Population Division, U.S. Bureau of the Census, extrapolated from 1990-1996 estimates; 1998 Population, Los Angeles - Valley Portion: Claritas, Population Estimates, by SFV Zip Codes, reduced by estimates of non-city portions of Zip Codes taken from Block Group to Zip Code ratios, based upon 1990 Census data."

Page 6 and 7 - **Business Counts**, Source: ABI/InfoUSA, includes counts of all listed business entities, with larger businesses defined as those with gross annual revenues of at least \$10 million.

Page 13 and 23 - **Monthly Climate Summary** Period of Record : Burbank 12/1/1939 to 12/31/1998, Canoga Park 7/ 1/1949 to 12/31/1998, San Fernando 12/1/1927 to 3/31/1974, Tujunga 7/ 1/1966 to 3/31/1987. Composite of readings 1927 to 1998, Burbank, Canoga Park, San Fernando, and Tujunga, California. Source: Western Regional Climate Center, statistics by observation.

Page 28 - **Building Permits**, Source: Cities of Burbank, Calabasas, Glendale, Los Angeles, and San Fernando.

Page 51 - **Demographics** Source: Economic Alliance of the San Fernando Valley, Claritas. Areas shown are for entire Zip Codes identified with the respective communities and cities, with exceptions for splits in unincorporated areas. The totals will generally not match exact city and community boundaries and may contain substantial areas outside of such areas. Refer to Zip Codes and maps for clarification.

Page 47 - **Crime Rates** - Source: Economic Alliance of the San Fernando Valley, California Dept. of Justice, Division of Criminal Justice Information Service, Criminal Justice Statistics Center; **Fire Class Ratings** - City of Burbank, City of Glendale, City of Los Angeles, County of Los Angeles, and Insurance Services Office, Inc. Fire Suppression Rating Schedule, 1999.

Cover Photo - Courtesy of the Jet Propulsion Laboratory, NASA, and California Institute of Technology. The San Fernando Valley can be distinguished in the mid-left portion of this graphic. The original satellite photo was used by JPL imaging scientists to create "L.A.: The Movie" a two-minute film taking viewers on an aerial ride over a three-dimensional Southern California Landscape. Beginning with a single, two-dimensional LANDSAT satellite photo of the Los Angeles area and existing elevation data, image processors used a special computer algorithm to generate a total of 3,336 film frames. Animation techniques developed during the proof-of-concept project are used by scientists to study the three-dimensional nature of global cloud cover. The research is funded by NASA's Office of Space Science and Applications.



