

**CSU FULLERTON CENTERS AND INSTITUTES
SELF-STUDY / PROGRAM REVIEW 2017-2018**

for the

Center for Demographic Research (CDR)

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Last review: November 30, 2009
March 1, 2018

1. Mission and Goals

Center for Demographic Research (CDR) Mission Statement:

Provide accurate and timely information regarding population, housing and employment characteristics for Orange County, California in an efficient and cost-effective manner.

CDR Guiding Principles:

- *Accuracy*- Produce demographic estimates and projections that are valid and accurate.
- *Objectivity*- Produce demographic estimates and projections that are independent and objective.
- *Honesty, Trust and Respect*- Maintain the highest degree of integrity, honesty, trust, and respect in our interactions with our sponsors and clients, as well as private and public agencies and individuals.
- *Teamwork and Problem Solving*- Attain CDR's goals through cooperative efforts and collaboration with each other and our sponsors, and strive to solve problems in a creative and a cost-effective manner.
- *Learning and Teaching*- Continuously develop ourselves, enhancing our talents, skills, and abilities.

The following university strategic goals best express the CDR implementation efforts, goals, and guiding principles:

- Goal 1: Develop and maintain a curricular and co-curricular environment that prepares students for participation in a global society and is responsive to workforce needs.
 - Provide resources for programs that increase student participation in activities and services that link degree, career and community.
- Goal 3: Recruit and retain a high-quality and diverse faculty and staff.
- Goal 4: Increase revenue through fundraising, entrepreneurial activities, grants, and contracts.
 - Enhance the University's external relationships by informing and educating external stakeholders about the impact of CSUF and our students on the region.

Some of the college-level missions and goals the CDR strives to attain are:

- Serving as exemplary teachers, researchers, mentors, colleagues, and active members of our campus, regional, and professional communities;
- Promote the work of our faculty, our students, and our alumni and the value of the humanities and social sciences on the campus, in the community, and in the workplace.
- To seek and provide support for faculty to engage in scholarly and creative activity.
- To support scholarship and creative activity that improves pedagogies and exposes students to informed analytical and critical skills.
- To share the knowledge we gain through scholarly and creative activity with our students, our colleagues, and our intellectual communities.
- To promote projects that strengthen collaboration and communication among our students, departments, Colleges, and our regional, national and global communities.
- To provide mentoring, service-learning and other course-related opportunities that prepare students to enter the local and global workforce.
- To design and employ opportunities for students to develop transferable skills in scholarly/creative activity of the humanities and the social sciences, project-based learning, teamwork, social networking, and the ability to present themselves as professionals.
- To provide local, regional, national, and international communities with opportunities both on- and off-campus to engage intellectually and professionally with the scholars and students in our College.

2. Activities

The CDR is a non-profit research center that operates in partnership with California State University, Fullerton (CSUF), supporting the university's learning-centered mission. The CDR makes its wealth of

data available to faculty and student researchers, assists the faculty in designing instructional activities in the field of demography, and collaborates with faculty in their research while drawing on their expertise in its project activities. Through such linkages, the CDR provides opportunities for CSUF and other institutions of higher education to benefit from participation in regional demographic concerns.

The CDR operates under a renewed three-year contract, which last covered the period of FY2014/15 - FY2016/17, and had a corresponding work program developed by the CDR sponsoring agencies and the CDR Director. This work program contains quarterly, annual, and multi-year products that have been produced since the CDR was established at CSUF in 1996 and carries on work products that were produced by the County of Orange prior to CDR's creation. CDR staff is hired, often CSUF students and graduates, and trained to work on the specific projects within the scope of work with direct supervision and training by the CDR Director and Assistant Director. The following are the products and services completed within the CDR MOU work program for FY2014/15 - FY2016/17:

Reports

- Orange County Projections (approximately every four years)
- Orange County Progress Report (Annual)
- Orange County Facts and Figures (Quarterly)
- Boundary and Annexation Reports (Annual)

Public Information Services

- Provide Public Information on Orange County Demographics as Requested
- Maintain CDR Homepage
- Update Regional Housing Needs Assessment (RHNA) allocations
- Process census data
- Serve as California State Data Center affiliate

Databases

- Housing Inventory System
- Estimated Population by Age by Partial Census Tract
- Projected Population, Housing and Employment by Traffic Analysis Zone
- Projected Secondary Variables by Traffic Analysis Zone
- Census Data by Partial Traffic Analysis Zone
- Population and Housing Estimates by Traffic Analysis Zone
- Employment Estimates by Traffic Analysis Zone
- Sphere of Influence Population Estimates for OC LAFCO
- Consolidated Boundary and Annexation Program (CBAS)

Committees

- Participate in Sponsor Technical Advisory Committees as Requested
- Coordinate with University Research Centers
- Coordinate with SCAG and SCAG Committees

3. Organizational Structure and Governance

The Center for Demographic Research (CDR) was established in 1996 to ensure Orange County continued its presence in the development and support of demographic information. The CDR activities were located at CSUF to ensure data consistency through the maintenance of a centralized data source of Orange County demographic characteristics. The CDR operates under a three-year Memorandum of Understanding (MOU) between the CSUF Auxiliary Services Corporation (CSUF ASC) and the funding agencies known as CDR Sponsors: the County of Orange, the Orange County Council of Governments, the Orange County Sanitation District, the Orange County Transportation Authority, the Transportation Corridor Agencies, the Municipal Water District of Orange County, the Orange County Water District, the Southern California Association of Governments, the Orange County Local Agency Formation Commission, and CSUF. These agencies govern and support the Center for Demographic Research.

CDR is a non-profit research center that operates within the structure and management of the CSUF ASC and its Office of Sponsored Programs. CDR staff are all employees of the CSUF ASC. The CDR Director and Assistant Director directly oversee the daily operations of the CDR. Each research center at CSUF is affiliated with an academic college and that Dean is the center director's supervisor. CDR falls within the College of Humanities and Social Sciences (HSS). The CDR is governed by a Management Oversight Committee which is supported by a Technical Advisory Committee. Each member of the CDR committees is a staff member or representative of the Sponsor agencies and each has an equal standing as a voting member. The composition of the FY2014/15 - FY2016/17 committees are as follows:

CDR Sponsor Agency	Management Oversight Committee	Technical Advisory Committee
County of Orange	1	1
Orange County Transportation Authority	1	1
Orange County Council of Governments	1	1
Orange County Sanitation District	1	1
Transportation Corridor Agencies	1	1
Southern California Association of Governments	1	1
Municipal Water District of Orange County	1 joint member with	1 joint member with OC
Orange County Water District	OC Water District	Water District
California State University, Fullerton	1	2
Chapman University	0	1
University of California, Irvine	0	1
OC Local Agency Formation Commission	1 Ex-officio, non-voting	1 Ex-officio, non-voting

The CDR Management Oversight Committee (MOC) meets at least four times each year and is responsible for:

1. Considering policy matters associated with the operations of the CDR,
2. Reviewing products status and activities which are part of the core work program,
3. Reviewing the CDR's financial status and status of annual MOU signatures,
4. Setting CDR budget and modifying staff salaries,
5. Considering requests from additional agencies wishing to become sponsors,
6. Modifying budget and work program upon addition or termination of a sponsor,
7. Addressing other matters vital to the function of the CDR, and
8. Undertaking additional tasks as requested by the CDR Sponsors.

The MOC was integral during the relocation discussion of the CDR offices in FY2015/16 and with the success of the CDR's 20th anniversary celebration and open house held in October 2016.

The CDR Technical Advisory Committee (TAC) provides technical guidance and input into the development of each product produced under the MOU before they are reviewed by the CDR MOC. The TAC advises the CDR Director, as well as reports to the CDR MOC. The TAC meets at least four times each year and is responsible for:

1. Providing a report to the CDR MOC summarizing its meetings,
2. Providing advice on the approach, techniques, data sources and methods used to develop new products,
3. Facilitating the acquisition of data necessary to produce products,
4. Providing suggestions on the interpretation and analysis incorporated into deliverables,
5. Providing input on assumptions for the development of the growth projections,
6. Providing review of deliverables prior to approval by the CDR MOC, and
7. Undertaking other tasks as identified by the CDR MOC.

4. Resources and Sustainability

The five full-time staff and three part time CDR staff are employed through the CSUF ASC. The CDR occupies and pays rent for its space in the Titan Hall/ASC building through a joint agreement with the CSUF ASC and CSUF. CDR was moved to Titan Hall/ASC in 2016 after reorganization of the CSUF

College Park building, as directed by the CSUF President, where CDR had resided for 17 years. CSUF's relocation of CDR to Titan Hall/ASC was coordinated with the CDR Sponsors. Titan Hall/ASC also houses the CSUF Office of Research and Sponsored Projects (ORSP), the CSUF Office of Grants & Contracts (OGC), the CSUF Auxiliary Services Corporation (ASC), and the ASC Office of Sponsored Programs (OSP). CDR being co-located with these groups was a logical choice because of the regular interactions with these groups. CDR continues to pay rent as it did in the College Park space. CSUF's contribution to the sponsorship of the CDR is through covering the space rent. Prior to 2017/2018, CSUF contributed 40% of the office space rent; the balance of 60% was paid for through the indirect cost collected on the CDR MOU. Beginning in FY2017/2018, CSUF pays for 100% of the office space rent as arranged by the CSUF ASC and CSUF VP/CFO.

CDR consults with CSUF faculty and staff on an as-needed basis. CDR has been a sub-contractor on projects for CSUF faculty as well as hired CSUF faculty as sub-contractors for additional contracts the CDR takes on. Three CSUF faculty members work with CDR on an on-going basis as committee members on the CDR MOC and CDR TAC. As stated above, these faculty attend committee meetings and spend approximately 10-15 hours annually advising CDR.

The CDR budget includes staff salaries, benefits, and operational costs to complete the MOU work program. CDR has a high degree of sustainability as it is designed to be a fully contained program, not operating on soft money. If funding is not provided by the Sponsors to cover the costs of the core work program and operations, the CDR would cease to exist. The CDR purchases all of its own computers, electronic equipment, furniture, and supplies. CSUF provides software licenses and IT support consistent with all campus personnel and entities.

Beyond the scope of work within the MOU, the CDR is also allowed to perform additional work and services for sponsors and non-Sponsors. These additional projects cover the encumbered wages for staff and all costs associated with the additional work.

CDR Revenues:	MOU Funding by the CDR Sponsors	Additional Contract/Invoice Work outside scope of MOU
FY2014/15	\$617,140	\$18,728
FY2015/16	\$614,051	\$40,298
FY2016/17	\$617,275	\$26,126

5. Highlights and Accomplishments:

During FY2014/15, the CDR completed the 2014 Orange County Projections dataset and report which is the core function of the CDR. After completion, the CDR worked with local agencies to incorporate this long-range planning dataset into Southern California's regional transportation plan in 2016. CDR completed a modified version of the 2014 Orange County Projection series in FY2015/2016. Since then, the CDR has worked to update the estimates for the next iteration of the projections dataset which is currently under development. Completion of the projections dataset will be during FY2018/2019. The CDR's three-year work program cycle culminates in the production of this dataset and report.

The CDR completed three volumes of the annual *Orange County Progress Report* which is a 200+ page, comprehensive resource document containing a variety of statistical and demographic data depicting Orange County and its thirty-four cities. This annual report presents a unified and a comprehensive picture of Orange County including its economic health, its demographic status and trends, and other information of interest to those who might wish to relocate to Orange County, do business in the County, or otherwise have an interest in the economic and demographic status and future of Orange County.

The newly-added Boundary and Annexation Reports are produced in collaboration with the Orange County Local Agency Formation Commission (OC LAFCO) and detail the annual changes to jurisdictional boundaries for the 34 Orange County cities and unincorporated county. The Housing Activity Reports

were informally added to the CDR work program and detail the net annual housing unit construction and demolition data reported by each of the 35 Orange County jurisdictions.

Part of its core function is for the CDR to assist local government agencies in their long-term planning efforts and coordination with the regional planning agency, the Southern California Association of Governments (SCAG). An example of one of the CDR's successful efforts was the development of a series of maps demonstrating the differences between the SCAG draft policy growth forecast and the CDR's Orange County Projections. Through this effort, the maps were provided to the OCCOG Board of Directors and SCAG which provided demonstrable proof in errors in SCAG's growth forecast dataset. The result was CDR was successful in correcting all of SCAG's data, ensuring that all of Orange County's local input was used in the 2016 Regional Transportation Plan. Orange County was the only successful subregion and county within the SCAG region to have all of their local input data be used unchanged. In its on-going production of the Orange County Projections and elevated participation in local and regional planning efforts in recent years, the CDR at CSUF is a recognized and respected organization in the Southern California planning arena.

As mentioned previously, CDR relocated its offices in September 2016 and hosted an open house and celebration to commemorate CDR's 20th anniversary and its partnerships with Orange County agencies. The event was a huge success with over 70 agency staff and local elected officials attending the ceremony. Several elected officials and agency representatives provided comments and praise for the CDR during the program festivities.

6. Planning and Strategic Outlook

The structure and governance of the CDR is outlined in the Memorandum of Understanding (MOU) between the CSUF ASC and the CDR Sponsors, as described above. The Management Oversight Committee (MOC) guidance and involvement shapes the strategic planning process, goals, and work product of the CDR. CDR recently began its current, three-year MOU and work program for FY2017/18-2019/2020. During FY2019/2020, CDR will develop with the MOC the next three-year work program which largely involves the completion of the Orange County long-range projections dataset used in local and regional planning and the update to CDR models and databases with the 2020 Decennial Census data. The Sponsors will assess product and service needs to maintain their operations over the following three years, along with sustaining the CDR work program. As in past cycles, the CDR will work with the CDR Sponsors through the MOC to develop a work program which will incorporate sponsor needs and sustain the CDR core function with available funding.

In these lean financial times, current budget expenditures, as well as future budgets, have reduced spending for all non-personnel items: travel, training, workshop attendance, equipment modifications, and supplies. Changes in personnel and indirect costs will be tied to benefits costs mandated by the CSUF ASC Human Resources and CSUF Office of Grants and Contracts. The CDR Director and the Sponsors continue to search for additional funding options and new sponsoring agencies.

The sponsoring agencies recognize the technical complexity of preparing and maintaining demographic forecasts requires a long-term commitment from public agencies to maintain data consistency, quality, and expertise. Our goal is to continue to fulfill CDR's core function which is the preparation of demographic forecasts for Orange County, California which is used in a wide range of local, subregional and regional applications.

7. Appendices & Attachments

1. 20th Anniversary Celebration & Open House Program
2. Orange County Progress Report 2015, 2016, 2017 (covers; hardcopies are available upon request)

CENTER FOR DEMOGRAPHIC RESEARCH

The Center for Demographic Research (CDR) was established at CSUF in 1996 to ensure that Orange County continued its strong tradition of a presence in the development and support of demographic information within the Southern California region. The primary goal of the CDR is to provide accurate and timely information regarding population, housing, and employment characteristics to public agencies, local jurisdictions and regional planning authorities, as well as private citizens and businesses. The CDR's activities are located at California State University, Fullerton, ensuring data consistency through the maintenance of a centralized data source of Orange County demographic characteristics. As a bridge between public and private agencies, the CDR fosters mutual cooperation and achievement of goals in an efficient, cost-effective manner. The CDR is a joint partnership between the:

County of Orange
 Municipal Water District of Orange County
 Orange County Council of Governments
 Orange County Sanitation District
 Orange County Transportation Authority
 Orange County Water District
 Southern California Association of Governments
 Transportation Corridor Agencies
 Orange County Local Agency Formation Commission
 California State University, Fullerton

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 CSUF College of Humanities & Social Sciences
 CSUF Geography Department
 CSUF University Advancement
 OC Choice Catering



Center for Demographic Research
 Cal State Fullerton

20th Anniversary Celebration
 &
 Open House

Thursday, October 13, 2016

PROGRAM

Welcome and Introductions

MARK FILOWITZ

Interim Associate Vice President for Academic Operations
 California State University, Fullerton

Remarks

KRIS MURRAY

Chair, Orange County Council of Governments
 Council Member, City of Anaheim

ROSS CHUN

Chair, San Joaquin Hills Transportation Corridor Agency
 Council Member, City of Aliso Viejo

JOHN NIELSEN & GREG SEBOURN

Chair & Vice Chair, Orange County Sanitation District
 Council Members, Cities of Tustin & Fullerton

MICHELE MARTINEZ

President, Southern California Association of Governments
 Council Member, City of Santa Ana

KURT BROTCHE

Director, Strategic Planning
 Orange County Transportation Authority

DEBORAH DIEP

Director, Center for Demographic Research

