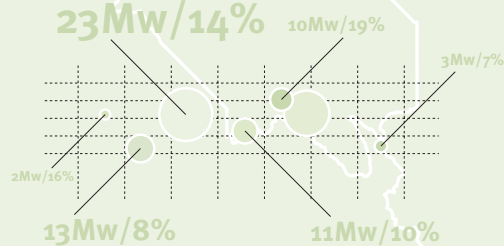
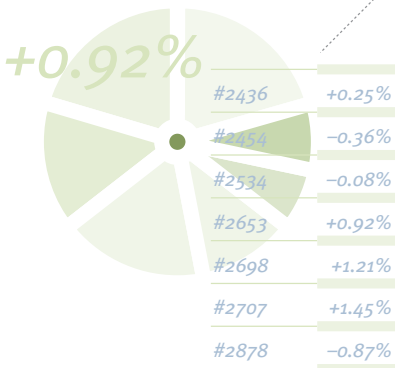
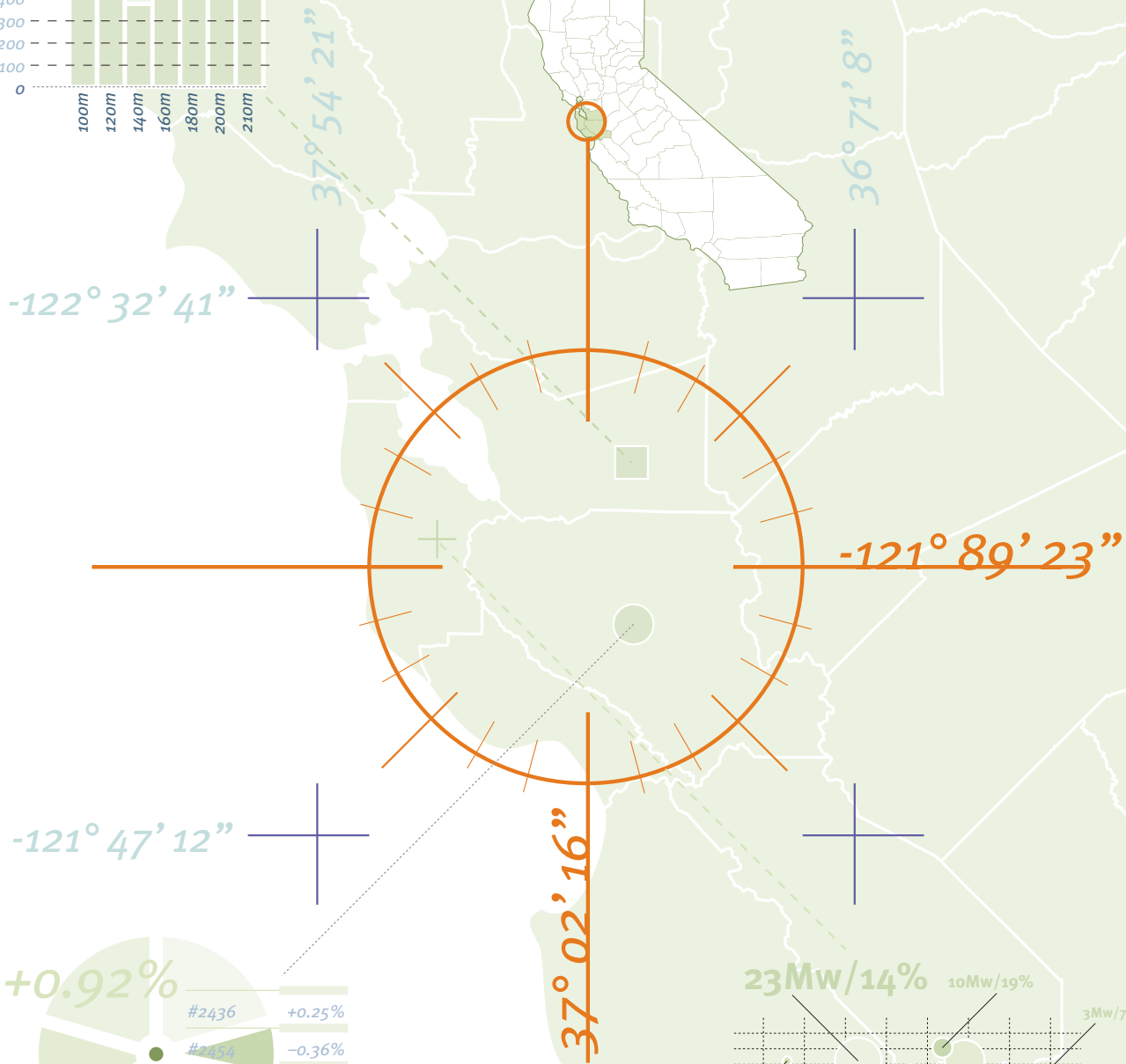
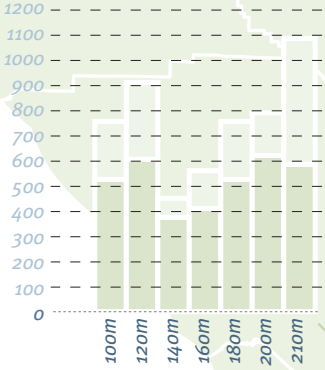


# i n d e x

OF

# SILICON VALLEY

2009



GOVERNANCE

PLACE

SOCIETY

ECONOMY

PEOPLE

# JOINT VENTURE BOARD OF DIRECTORS

## OFFICERS

**Chris DiGiorgio** – Co-Chair,  
*Accenture, Inc.*

**Hon. Chuck Reed** – Co-Chair,  
*City of San José*

**Russell Hancock** – President & CEO  
*Joint Venture: Silicon Valley Network*

## DIRECTORS

**John Adams**  
*Wells Fargo Bank*

**Larry Alder**  
*Google*

**Hon. Elaine Alquist**  
*California State Senate*

**Harjinder Bajwa**  
*Solectron*

**Gregory Belanger**  
*Comerica Bank*

**George Blumenthal**  
*University of California at Santa Cruz*

**Steven Bochner**  
*Wilson Sonsini Goodrich & Rosati*

**Dave Boesch**  
*San Mateo County*

**Ed Cannizzaro**  
*KPMG, LLP*

**Emmett D. Carson**  
*Silicon Valley Community Foundation*

**Barry Cinnamon**  
*Akeena Solar*

**Pat Dando**  
*San José/Silicon Valley Chamber of  
Commerce*

**Chris Dawes**  
*Lucile Packard Children's Hospital*

**Mary Dent**  
*SVB Financial Group*

**Dan Fenton**  
*San José Convention & Visitors Bureau*

**Rick Fezell**  
*Ernst & Young*

**Jon Friedenberg**  
*Fogarty Institute for Innovation at  
El Camino Hospital*

**Glenn Gabel**  
*Webcor Builders*

**Kevin Gillis**  
*Bank of America*

**Paul Gustafson**  
*TDA Group*

**Timothy Haight**  
*Menlo College*

**Chet Haskell**  
*Cogswell Polytechnical College*

**Joe Head**  
*SummerHill Homes*

**Mark Jensen**  
*Deloitte & Touche LLP*

**Martha Kanter**  
*Foothill-De Anza Community College  
District*

**W. Keith Kennedy Jr.**  
*Con-way*

**Alex Kennett**  
*Intero Real Estate*

**Dave Knapp**  
*City of Cupertino*

**Hon. Liz Kniss**  
*Santa Clara County Board of Supervisors*

**Linda J. LeZotte**  
*Berliner Cohen*

**James MacGregor**  
*Silicon Valley/San José Business Journal*

**Tom McCalmont**  
*Real Goods Solar*

**Jean McCown**  
*Stanford University*

**Curtis Mo**  
*Wilmer Cutler Pickering Hale and Orr LLP*

**Mairtini Ni Dhomhnaill**  
*Accretive Solutions*

**Joseph Parisi**  
*Therma Inc.*

**Bobby Ram**  
*SunPower*

**Paul Roche**  
*McKinsey & Company*

**Clyde Rodriguez**  
*AMD*

**Harry Sim**  
*Cypress Envirosystems*

**Susan Smarr**  
*Kaiser Permanente*

**John Sobrato Sr.**  
*Sobrato Development Companies*

**Neil Struthers**  
*Santa Clara County Building &  
Construction Trades Council*

**Mark Walker**  
*Applied Materials*

**Chuck Weis**  
*Santa Clara County Office of Education*

**Linda Williams**  
*Planned Parenthood Mar Monte*

**Jon Whitmore**  
*San José State University*

**Daniel Yost**  
*Orrick Herrington & Sutcliffe LLP*

## SENIOR ADVISORY COUNCIL

**Frank Benest**  
*City of Palo Alto (Ret.)*

**Eric Benhamou**  
*Benhamou Global Ventures*

**Harry Kellogg Jr.**  
*SVB Financial Group*

**William F. Miller**  
*Stanford University*

# SILICON VALLEY COMMUNITY FOUNDATION BOARD OF DIRECTORS

## CHAIR

**Nancy Handel**  
*Corporate Executive*

## VICE CHAIR

**John M. Sobrato**  
*Sobrato Organization*

**Emmett D. Carson, Ph.D.**  
*CEO and President*

## DIRECTORS

**Laura Arrillaga-Andreessen**  
*Stanford Graduate School of Business*

**Jayne Battey**  
*Stewardship Council*

**Gloria Brown**  
*Community Leader*

**Caretha Coleman**  
*Coleman Consulting*

**Thomas J. Friel**  
*Retired Chairman, Heidrick & Struggles  
International, Inc.*

**Gregory Gallo**  
*DLA Piper*

**Narendra Gupta**  
*Wind River*

**Susan M. Hyatt**  
*Community Leader*

**William S. Johnson**  
*Palo Alto Weekly*

**Ivonne Montes de Oca**  
*The Pinnacle Company*

**C.S. Park**  
*Former chairman and CEO, Maxtor Corp.*

**Jennifer Raiser**  
*The Raiser Organization*

**Sanjay Vaswani**  
*Center for Corporate Innovation*

**Richard Wilkolaski**  
*Seiler LLP*

**Erika Williams**  
*The Erika Williams Group*

**Jane Williams**  
*Sand Hill Advisors, Inc.*

**Gordon Yamate**  
*Former Vice President  
and General Counsel, Knight Ridder*

## INDEX ADVISORS

**Bob Brownstein**  
*Working Partnerships USA*

**Leslie Crowell**  
*Santa Clara County*

**Mike Curran**  
*NOVA Workforce Board*

**Chris DiGiorgio**  
*Accenture*

**Debra Engel**  
*Community Leader*

**Marty Fenstersheib**  
*Santa Clara County Health Department*

**James David Fine**  
*University of San Francisco*

**Jeff Fredericks**  
*Colliers International*

**Tom Friel**  
*Retired Chairman, Heidrick & Struggles*

**Matt Gardner**  
*Bay Area Bioscience Center*

**Corinne Goodrich**  
*SAMTRANS*

**Chester Haskell**  
*Cogswell Polytechnical College*

**Richard Hobbs**  
*Office of Human Relations in  
Santa Clara County*

**Jean Holbrook**  
*San Mateo County Office of Education*

**Martha Kanter**  
*Foothill - De Anza Community  
College District*

**James Koch**  
*Center for Science, Technology & Society  
at Santa Clara University*

**Stephen Levy**  
*Center for Continuing Study of the  
California Economy*

**John Maltbie**  
*County of San Mateo*

**Connie Martinez**  
*Children's Discovery Museum*

**Reesa McCoy Staten**  
*Robert Half International*

**Sanjay Narayan**  
*Sierra Club*

**Dave Pearce**  
*Miasole*

**AnnaLee Saxenian**  
*University of California Berkeley*

**Chris Seams**  
*Cypress Semiconductor Corporation*

**Lynne Trulio**  
*San Jose State University*

**Anthony Waitz**  
*Quantum Insight*

**Kim Walesh**  
*City of San Jose*

**Linda Williams**  
*Planned Parenthood Mar Monte*

**Erika Williams**  
*The Erika Williams Group*

**Erica Wood**  
*Silicon Valley Community Foundation*

## Prepared By:

### COLLABORATIVE ECONOMICS

Doug Henton  
John Melville  
Tracey Grose  
Gabrielle Maor  
Tiffany Furrell  
Heidi Young  
Dean Chuang  
Bridget Gibbons  
Hope Verhulp

## ABOUT THE 2009 SILICON VALLEY INDEX

Dear Friends:

The year past was one of dramatic change for our region.

Twelve months ago Silicon Valley was experiencing above-average growth rates and we were still somewhat insulated from the financial crises taking hold on the nation. This is no longer the case. Since November we have seen a steep spike in job losses and a sharp rise in commercial vacancies. The pace of these losses is increasing.

Over the years, the *Index* has documented the way Silicon Valley has weathered many similar downturns. In the 1980s, we faced down stiff global challenges in our mainstay, the semiconductor industry. In the 1990s, we coped with major downsizing in the defense sector. In the early stages of this decade, we dealt with the dot-com bust and some severe external shocks. Each time Silicon Valley retrenched, restructured and rebounded.

Today we're racked by the collapse of our nation's financial institutions, a meltdown in the housing markets and a global climate crisis, *and yet here too we may already be seeing the seeds of a Valley comeback*. It is being driven by our newly emerging "green" economy and the pages here show investment in clean technology growing 94 percent since 2007. Jobs in this sector grew 23% since 2005. We document how we've become a magnet for green innovation and a new epicenter for solar technology. We see these as hopeful trends, and not merely because they chart a path out of recession; they also show the nation a path to a new energy future.

Capitalizing on the opportunity requires some fundamental restructuring, particularly with respect to our region's workforce. The growth sectors have functional characteristics that require training and re-tooling, and transitioning our present workforce out of the old and into the new is far from automatic. More than ever, we need effective institutions helping the Valley's workers upgrade their skills and shift occupations.

In response to these changes—and to seize upon our opportunities—this year's *State of the Valley* conference features the release of three complementary reports:

- The *Index*, expanded this year to include all of San Mateo County, continues to track overall trends in the economy and community.
- A separate "Special Analysis" provides a more in-depth look at the impact of economic restructuring on workforce transitions.
- Additionally, Joint Venture is providing a "Greenprint" outlining the region's opportunities in the green economy and proposing a game plan for the coming decade.

Our two organizations are proud to provide a careful accounting of where Silicon Valley stands, and to do it on an annual basis. Regions that want to thrive first of all need a means to assess themselves, and we're glad to provide it.

Sincerely,



Russell Hancock, Ph.D.  
President & Chief Executive Officer  
Joint Venture: Silicon Valley Network



Emmett D. Carson, Ph.D.  
CEO & President  
Silicon Valley Community Foundation

# THE SILICON VALLEY REGION

**Area:** 1,854 square miles

**Population:** 2.52 million

**Jobs:** 1,412,372

**Average Annual Earnings:** \$79,116

**Foreign Immigration:** +22,513

**Domestic Migration:** -4,745

**Adult educational attainment:**

**14%** Less than High School

**18%** High School Graduate

**24%** Some College

**26%** Bachelor's Degree

**18%** Graduate or Professional Degree

**Age distribution:**

**13%** 0-9 years old

**13%** 10-19

**36%** 20-44

**26%** 45-64

**11%** 65 and older

**Ethnic composition:**

**40%** White, non-Hispanic

**28%** Asian, non-Hispanic

**25%** Hispanic; **3%** Other

**3%** Black, non-Hispanic

**<1%** American Indian, Alaskan Native

**Foreign Born: 36%**

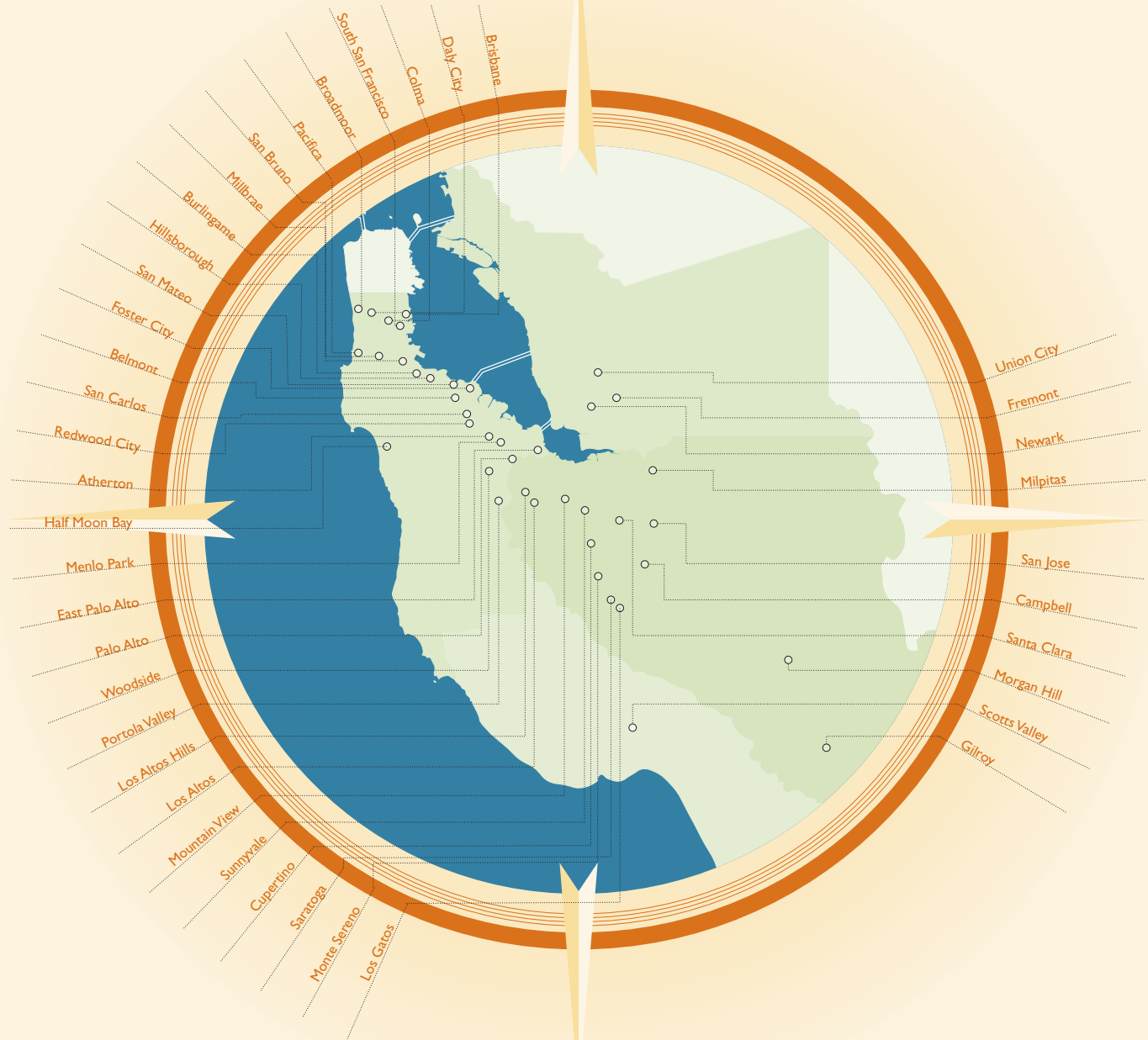
**Origin:**

**57%** Asia

**32%** Americas

**9%** Europe;

**1%** Oceania; **1%** Africa



The geographical boundaries of Silicon Valley vary. The region's core has been defined as Santa Clara County plus adjacent parts of San Mateo, Alameda and Santa Cruz counties. In order to reflect the geographic expansion of the region's driving industries and employment, the *2009 Index* includes all of San Mateo County. Silicon Valley is defined as the following cities:

**Santa Clara County (all)**

Campbell, Cupertino, Gilroy, Los Altos, Los Altos Hills, Los Gatos, Milpitas, Monte Sereno, Morgan Hill, Mountain View, Palo Alto, San Jose, Santa Clara, Saratoga, Sunnyvale

**Alameda County**

Fremont, Newark, Union City

**San Mateo County (all)**

Atherton, Belmont, Brisbane, Broadmoor, Burlingame, Colma, Daly City, East Palo Alto, Foster City, Half Moon Bay, Hillsborough, Menlo Park, Millbrae, Pacifica, Portola Valley, Redwood City, San Bruno, San Carlos, San Mateo, South San Francisco, Woodside

**Santa Cruz County**

Scotts Valley

## TABLE OF CONTENTS

<b>2009 INDEX HIGHLIGHTS</b>	4
<b>INDEX AT A GLANCE</b>	6

### **PEOPLE**

*Silicon Valley's population growth is driven by foreign immigration, and nearly half of adult residents have at least a four-year university degree.*

Talent Flows and Diversity	8
----------------------------	---

### **ECONOMY**

*By the end of 2008, the region began revealing job losses and investment slowdown. However, bright spots exist in the growth in cleantech investment and in green jobs in the region.*

Employment	12
------------	----

Income	16
--------	----

Innovation	18
------------	----

### **SOCIETY**

*Challenges persist especially in the areas of education and health where disparities by race/ethnicity continue.*

Preparing for Economic Success	26
--------------------------------	----

Early Education	28
-----------------	----

Arts and Culture	30
------------------	----

Quality of Health	32
-------------------	----

Safety	36
--------	----

### **PLACE**

*As a result of choices residents and local policymakers are making, progress is being made on many fronts in the region in reducing negative environmental impacts.*

Environment	38
-------------	----

Transportation	42
----------------	----

Land Use	44
----------	----

Housing	46
---------	----

Commercial Space	50
------------------	----

### **GOVERNANCE**

*While Silicon Valley's residents are engaging in the political process at record levels, our cities are facing mounting fiscal challenges.*

Civic Engagement	52
------------------	----

Revenue	54
---------	----

APPENDICES	56
------------	----

ACKNOWLEDGMENTS	61
-----------------	----

# 2009 INDEX HIGHLIGHTS

**Until the last quarter of 2008, Silicon Valley seemed to be weathering the global financial crisis and economic recession better than the nation. This is no longer the case. Since November we have witnessed a spike in job losses and a significant drop in the commercial property markets.**

- While the U.S. economy has been in recession since December 2007, total Silicon Valley jobs held relatively steady through October 2008. However, December 2008 reported net job losses of 1.3% over the previous year compared to drops of 1.7% statewide and 2% nationally.
- After slowing since the end of 2007, demand for commercial space dropped precipitously in the last quarter of 2008, and vacancies shot up across all property types.

**While the impact of the current economic slowdown is now emerging, some of the region's core competitiveness measures remain relatively strong and new strengths are coming to the fore.**

- Silicon Valley is at the epicenter of the development of clean technology and new related business models. Just since 2005, the number of jobs in businesses providing green products and services increased 23%.
- In the first half of 2008, growth was reported in some of Silicon Valley's key industries. Employment in Information Products and Services grew more than 4% from Q2 2007 to Q2 2008 (the latest figures available). Life sciences also grew more than 3% during this period.
- While venture capital investment is down for the first time since 2005 in the region and nationally, the Valley maintained its 29% national share of venture capital in 2008.
- While total patents slowed slightly, the Valley actually increased its contributing share of California and U.S. patents.
- Silicon Valley's per capita income stalled for the first time since 2003 along with statewide and national incomes. However, Silicon Valley incomes have grown much faster (14%) than the national average (9%) over the past five years.

**Silicon Valley continued to increase its investment in key areas of innovation despite global financial turmoil.**

- Even though total venture capital investment is down 7.7%, investment in clean technology increased 94% in the region between 2007 and 2008, reaching almost \$1.9 billion. Silicon Valley now accounts for 31% of total U.S. cleantech VC investment.
- IT services, media and entertainment, biotechnology, telecommunications, and medical devices and equipment—all attracted more venture capital investment in 2008 than in 2007.

## **A cautionary note is called for on two fronts concerning our region's competitiveness: stalling productivity and lagging residential access to high-speed internet.**

- For the first time since 2001, value added per employee stalled in 2008 shaving off a half percentage point from the previous year. On par with levels in 2000, regional productivity continues to exceed the U.S. but now equals the statewide average.
- Only six percent of households have access to very high-speed broadband internet services exceeding 10 Mbps while all other California metro areas have far greater access: Los Angeles (95%), San Diego (91%), Inland Empire (78%), and Sacramento (52%).

## **The national mortgage crisis has hit the Valley particularly hard.**

- Home foreclosure sales went up faster in Silicon Valley than California as a whole in 2008.
- While home prices in Silicon Valley have dropped less than in other major regions of California, falling prices have reduced the net worth of many households.
- Housing affordability improved somewhat for first-time homebuyers in 2008, but it improved more in other California regions because of sharper price decreases. This meant that Silicon Valley became the least affordable region for housing in California.

## **Our youth are moving in two directions.**

- Some are doing better. Immunization rates are at an all-time high. Of eighth-graders enrolled in algebra, 78% scored as advanced on the statewide Algebra II test.
- Some are doing worse. The teen birth rate rose substantially for the first time in more than a decade. The rate of child abuse increased for the fourth year in a row during a time when California's rate has been in decline.

## **We are sustaining a long-term commitment to improving our natural and built environments—but also a pattern of underinvestment in arts and culture.**

- On a range of indicators—from waste diversion to water use efficiency and to protected open space—Silicon Valley has continued to make steady gains over time.
- We are growing more efficiently. We have sustained a density of about 20 units per acre for newly-approved housing since 2005—a level twice that of 2003, and three times that of a decade ago. We have experienced a significant increase in the percentage of newly-approved housing near transit from 40% in 2006 to 69% in 2008.
- Our contributions to art and cultural organizations as a proportion of our region's income ranks far below that of leading U.S. metropolitan areas—and only about half the average of the top twenty metropolitan areas by population.

## **We are making tangible progress in changing our travel patterns to less-polluting means.**

- As a whole, Silicon Valley residents have been driving fewer miles since 2001. Our total fossil fuel consumption per capita has dropped 10% since 2000, compared to just 1% for California. The number of newly registered gasoline-powered vehicles in Silicon Valley has dropped by a quarter since the beginning of the decade.
- Silicon Valley commuters are using more alternatives to driving alone. In 2007, 75% of commuters drove alone, down from 78% four years before. In 2008, transit ridership in Silicon Valley reached a five-year high.
- We are at the forefront of alternative fuel vehicles. Silicon Valley now accounts for 15% of newly registered hybrids, 10% of electric, and 5% of natural gas vehicles in California.

# THE 2009 INDEX

## AT A GLANCE

### WHAT IS THE INDEX?

The Silicon Valley Index has been telling the Silicon Valley story since 1995. Released early every year, the indicators measure the strength of our economy and the health of our community—highlighting challenges and providing an analytical foundation for leadership and decision making.

### WHAT IS AN INDICATOR?

Indicators are measurements that tell us how we are doing: whether we are going up or down, going forward or backward, getting better or worse, or staying the same.

### Good indicators:

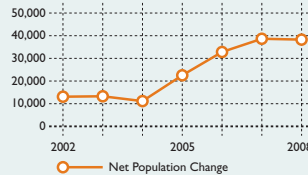
- are bellwethers that reflect fundamentals of long-term regional health;
- reflect the interests and concerns of the community;
- are statistically measurable on a frequent basis; and
- measure outcomes, rather than inputs.

Appendix A provides detail on data sources for each indicator

## PEOPLE

Silicon Valley's population growth is driven by foreign immigration. Nearly half of adult residents have at least a four-year university degree.

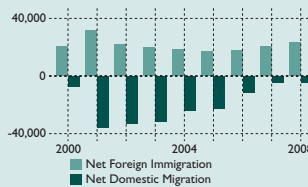
### Net Population Change



### Percent Change between 2007 and 2008:

Silicon Valley **+1.6%** ↑  
California **+1.2%** ↑

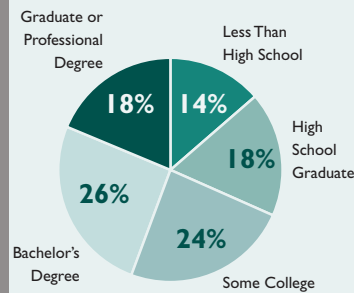
### Net Migration Flows



### Population Change between 2007 and 2008

Net Foreign Immigration **+9%** ↑  
Net Domestic Migration **-9%** ↓

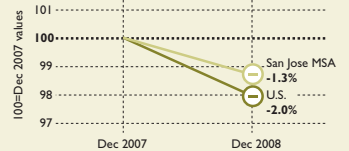
### Educational Attainment



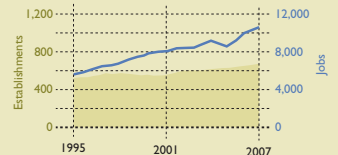
## ECONOMY

By the end of 2008, the region began revealing job losses and investment slowdown. However, bright spots exist in the growth in cleantech investment and in green jobs in the region.

### Change in Jobs Relative to December 2007

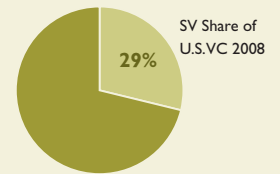


### Green Business Establishments & Jobs



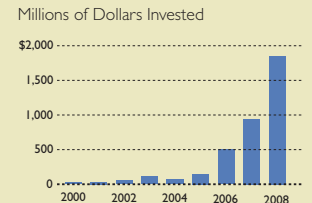
Green Growth 95-07 05-07  
Jobs **88%** **23%**  
Establishments **29%** **8%**

### Venture Capital Investment



2007-2008  
Silicon Valley **-7.7%** ↓  
U.S. **-11.4%** ↓

### VC Investment in Clean Technology



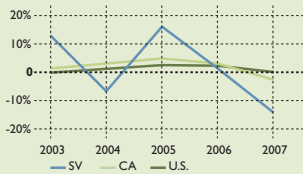
2007-2008  
Silicon Valley **+94%** ↑  
Rest of CA **+63%** ↑  
U.S. **+52%** ↑

## SOCIETY

Challenges persist in the region especially in the areas of education and health where disparities by race/ethnicity continue.

Drop-out rate in Silicon Valley was **12%** for the school year 2006-2007

### Preschool Enrollment

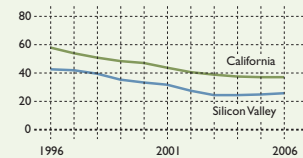


2006-2007

Enrollment **-14%** ↓

### Teen Birth Rate

Per 1,000 Females Age 15-19



2005-2006

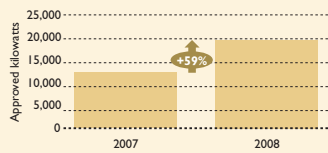
Silicon Valley **+5%** ↑  
California **+2%** ↑

## PLACE

As a result of the choices residents and local policymakers are making in the region, progress is being made on many fronts in reducing negative environmental impacts.

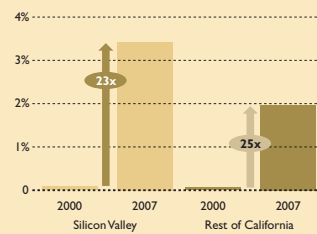
### Solar Installations

Capacity (kw) added through the California Solar Initiative - Silicon Valley



### Alternative Fuel Vehicles

as a Percentage of Total Newly Registered Vehicles



### Newly Approved Residential Development

1998: **7** Units per Acre  
2008: **20** Units per Acre

## GOVERNANCE

While Silicon Valley's residents are engaging in the political process at record levels, our cities are facing mounting fiscal challenges.

### Record Voter Turn-Out 2004-2008:

Silicon Valley **+10%** ↑  
California **+7%** ↑

### Change in City Revenue

Fiscal Year 04-05 to 05-06:

Property Taxes **+8%** ↑  
Sales Taxes **+2%** ↑

### 2004-2008

Pension Obligations **+166%** ↑  
City Revenue **+21%** ↑

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
**Index at a Glance | 06 | 07**

**PEOPLE** 08 | 11

**ECONOMY** 12 | 25

**SOCIETY** 26 | 37

**PLACE** 38 | 51

**GOVERNANCE** 52 | 55

Appendices | 56 | 60  
Acknowledgments | 61

# Talent Flows and Diversity

*Driven primarily by immigration, Silicon Valley's population continues to grow at a faster rate than California's.*

## WHY IS THIS IMPORTANT?

Silicon Valley's most important asset is its people. They drive the economy and shape the quality of life of the region. The educational attainment of a region and the continued attraction of young talent are vital to a region's economic success.

The region has benefited significantly from the entrepreneurial spirit of people drawn to Silicon Valley from around the country and around the world. In particular, immigrant entrepreneurs have contributed considerably to innovation and job creation in the region.<sup>1</sup> A region that can draw talent from other parts of the country and other regions of the world vastly improves its potential for closer integration with other innovative regions and thereby bolsters its global competitiveness.

The distribution of population across the region, as measured by average household size, can reveal how the demand for public services varies among Silicon Valley's cities.

## HOW ARE WE DOING?

With a net increase of 41,166 people, Silicon Valley's population grew 1.6% in 2008, and continued to surpass the state's growth rate of 1.2%. Net migration increased by 17% between 2007 and 2008, an increase of 17,768 people. The region's population growth is being driven by foreign immigration, which witnessed a net increase of 27% in 2008.

Silicon Valley's population has proportionally more people of working age without children. Compared to California and the U.S., Silicon Valley's population consists of fewer children and more people between 25 and 64 years of age. Almost double the rate for the U.S., 18% of Silicon Valley's population has a graduate or professional degree, and 44% have at least a bachelor's degree.

Producing top science and engineering talent is critical for an innovative region. The total number of degrees in science and engineering (S&E) conferred in the area dropped by five percent; however, contributing to the region's global connections, 17.6% of S&E degrees were conferred to foreign students in 2006. This continues an upward trend and remains higher than in the rest of California and the nation.

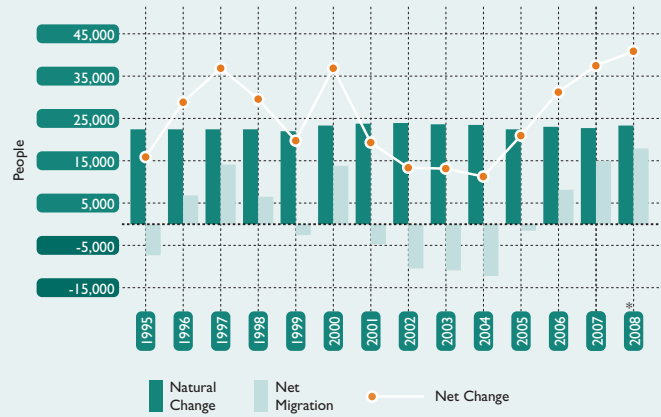
Household size varies considerably across the region, and this means that some cities are faced with higher demand for public services than others. As of 2008, the largest households are concentrated in East Palo Alto with 4.3 people per household, and Union City with 3.6. With an average of 2.2 people per household, Brisbane has the smallest households. Silicon Valley's typical household consists of 2.5 to 3 people.

<sup>1</sup> Anna Lee Saxenian. 2002. Local and Global Networks of Immigrant Professionals in Silicon Valley. San Francisco: Public Policy Institute of California. See also, S. Anderson & M. Platzer. 2006. "American Made: The Impact of Immigrant Entrepreneurs and Professionals on U.S. Competitiveness." National Venture Capital Association.

# PEOPLE

## Population Change

Components of Population Change  
Santa Clara and San Mateo Counties



\* Provisional population estimates for 2008  
Data Source: California Department of Finance

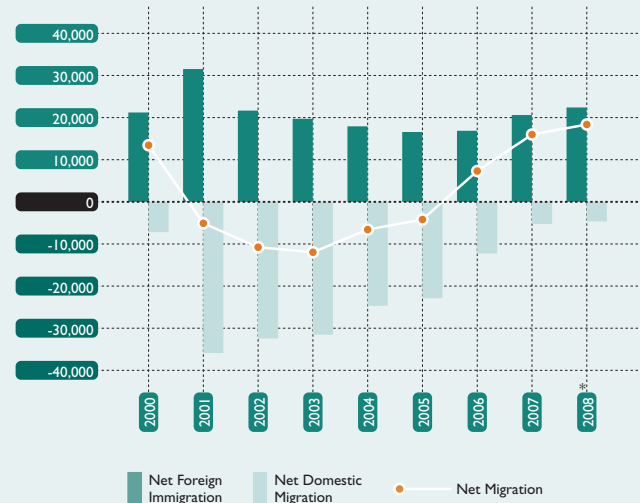
Analysis: Collaborative Economics

## Population Growth

	2007	2008	% Change
Silicon Valley	2,547,842	2,589,008	+1.6%
California	37,712,588	38,148,493	+1.2%

## Net Migration Flows

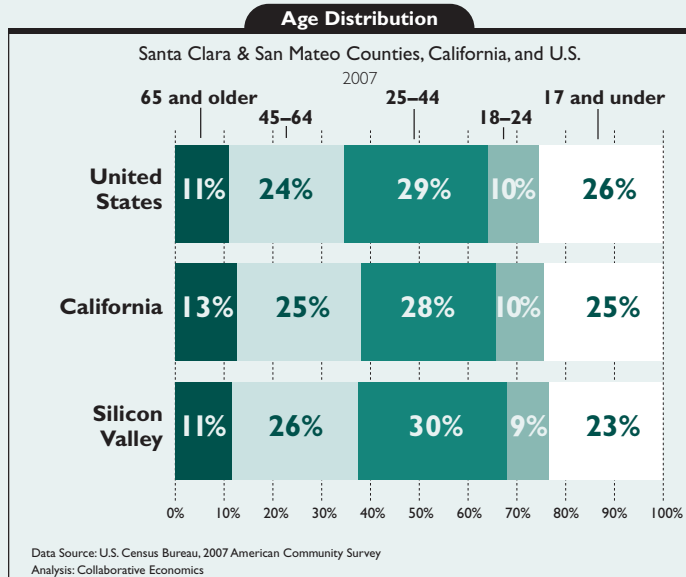
Foreign and Domestic Migration  
Santa Clara and San Mateo Counties



\* Provisional population estimates for 2008  
Data Source: California Department of Finance  
Analysis: Collaborative Economics

## Net Migration Silicon Valley 2007-2008

Domestic	- 4,745
Foreign	+ 22,513



- About the 2009 Index | 01
- Map of Silicon Valley | 02
- Table of Contents | 03
- 2009 Index Highlights | 04 | 05
- Index at a Glance | 06 | 07

**Talent Flows and Diversity**  
8 - 11

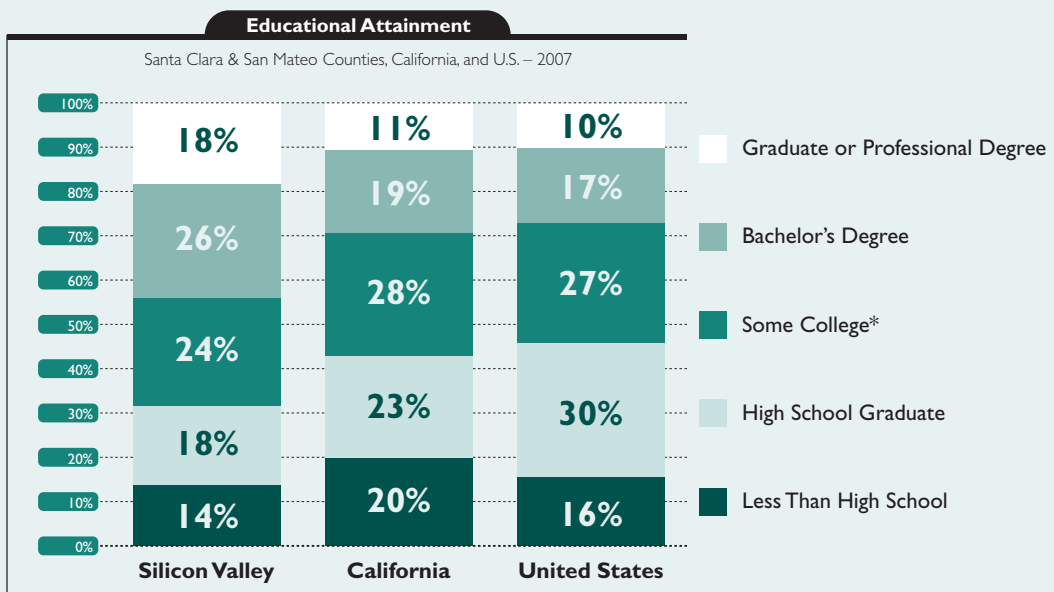
**ECONOMY** 12 | 25

**SOCIETY** 26 | 37

**PLACE** 38 | 51

**GOVERNANCE** 52 | 55

- Appendices | 56 | 60
- Acknowledgments | 61

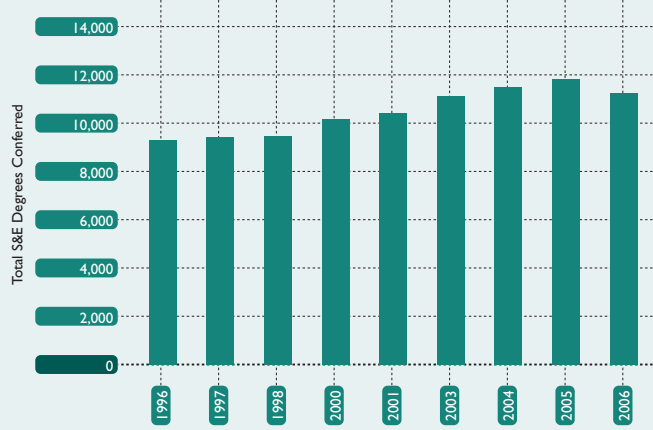


\* Some College includes: Less than 1 year of college; Some college, 1 or more years, no degree; Associates degree; Professional certification  
Data Source: U.S. Census Bureau, 2007 American Community Survey  
Analysis: Collaborative Economics

	Silicon Valley	California	U.S.
Some college or more	68%	57%	54%
Bachelor's Degree or higher	44%	30%	27%

## Total Science & Engineering Degrees Conferred

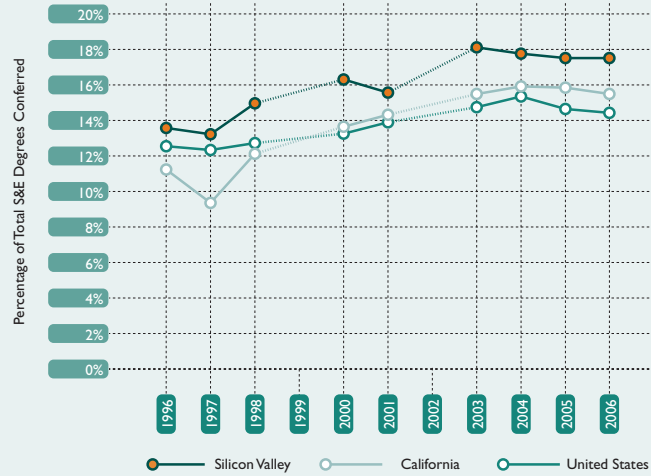
Universities in and near Silicon Valley



Note: Data for 1999 and 2002 not available  
 Data Source: National Center for Educational Statistics, IPEDS  
 Analysis: Collaborative Economics

## Foreign Students

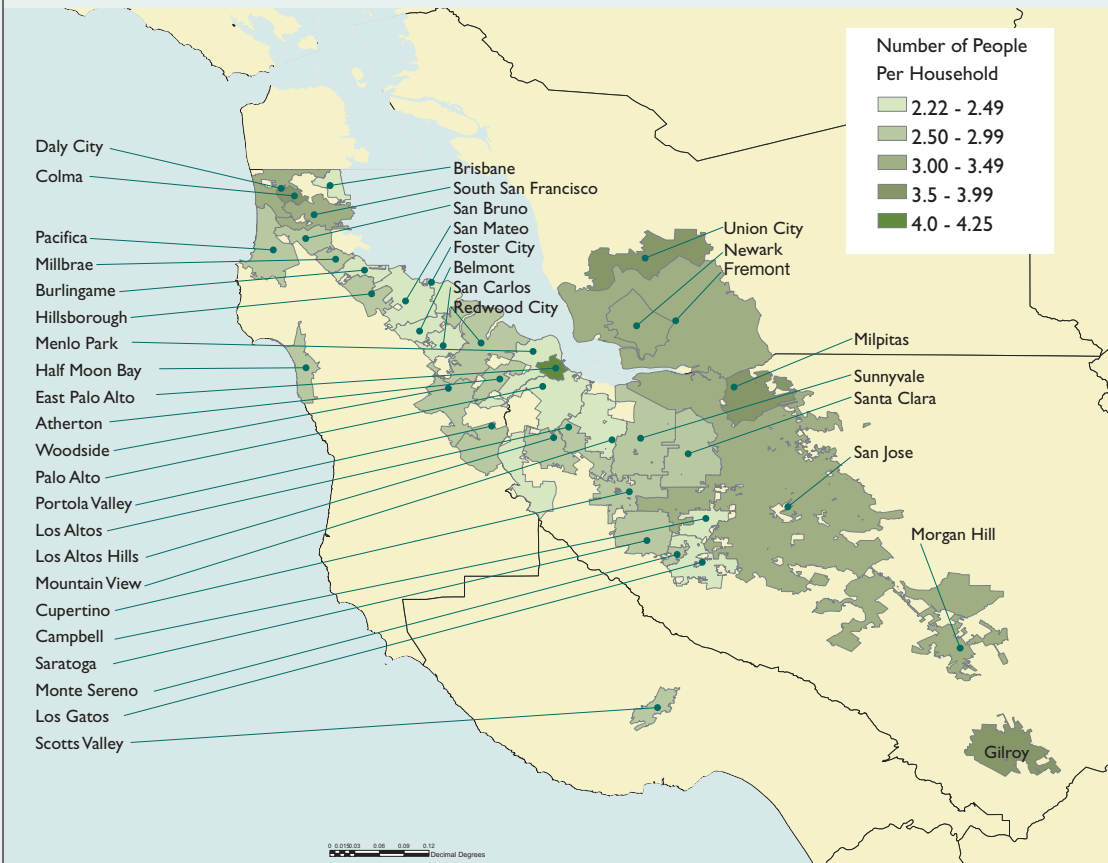
Percentage of Degrees in Engineering and Sciences  
 Conferred to Temporary Nonpermanent Residents  
 Silicon Valley, California, U.S.



Note: Data for 1999 and 2002 not available  
 Data Source: National Center for Education Statistics, IPEDS  
 Analysis: Collaborative Economics

**Household Size: Number of People per Household**

Silicon Valley Cities  
2008



Data Source: California Department of Finance  
Analysis: Collaborative Economics

About the 2009 Index | 01  
 Map of Silicon Valley | 02  
 Table of Contents | 03  
 2009 Index Highlights | 04 | 05  
 Index at a Glance | 06 | 07

**Talent Flows and Diversity**  
8 - 11

**PEOPLE**

ECONOMY 12 | 25

SOCIETY 26 | 37

PLACE 38 | 51

GOVERNANCE 52 | 55

Appendices 56 | 60  
 Acknowledgments | 61

# Employment

Although job losses in the region took off in the last two months of 2008, Silicon Valley had been witnessing employment growth in recent years in green industries such as renewable energy generation and energy efficiency.

## WHY IS THIS IMPORTANT?

Tracking job gains and losses is a basic measure of economic health. Shifts in employment across industries suggest structural changes in Silicon Valley's economic composition. Over the course of the business cycle, employment growth and decline across industries can be cyclical but the permanent changes reflect how the region's industrial mix is changing. Recent attention has been focused on the growing activities in the "green economy." While business establishment-based employment provides the broader picture of the region's economy, observing the employment and unemployment rates of the population residing in the Valley reveals the status of the immediate Silicon Valley-base workforce.

## HOW ARE WE DOING?

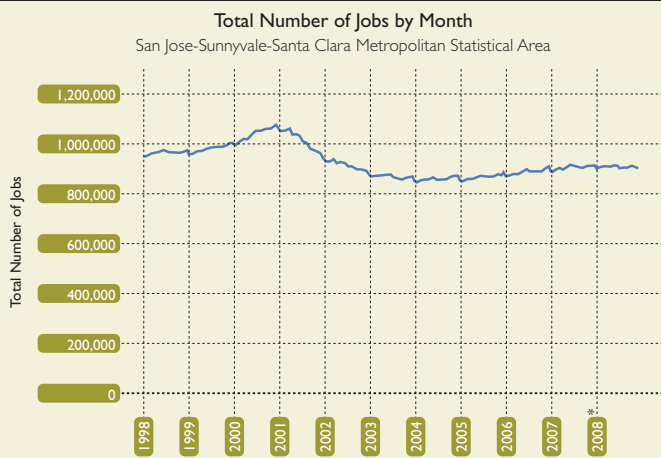
In the recent downturn, job losses among Silicon Valley residents have been slower in coming than nationally. After holding steady until October, employment of residents in the region began to drop in November. The San Jose-Sunnyvale-Santa Clara Metropolitan Statistical Area posted a 1.3% drop in December 2008 over December of the previous year.<sup>2</sup> Over the same period, monthly employment dropped by 1.7% statewide and 2% nationally. In view of total regional employment for which there is a longer reporting lag, the region had added 18,895 jobs between the second quarter 2007 and 2008 for an increase of 1.4%.<sup>3</sup>

Silicon Valley has six major areas of economic activity: Information Products & Services, Life Sciences, Community Infrastructure, Innovation & Specialized Services, Other Manufacturing, and Business Infrastructure. Making up 57% of the region's employment, Community Infrastructure provides the foundation for the region's economy and includes health services, education, retail, transportation, government administration and other local serving industries. (See Special Analysis for detailed explanation and Appendix B.) Compared to 2007, the first half of 2008 saw employment growth in three major areas of economic activity: Information Products & Services (4%), Life Sciences (3%), and Community Infrastructure (1%).

Silicon Valley is a hot-bed for clean technology. Businesses providing products and services that improve resource conservation and reduce environmental impacts have increased in number by 29% since 1995. These businesses include producers of state-of-the-art technology for renewable energy generation and energy management as well as lower-tech recycling services. In terms of jobs, the region has seen 88% growth since 1995 and 23% just since 2005. Jobs in Energy Generation account for the largest percentage of all green jobs, and these are primarily in solar system installation.<sup>4</sup> Job growth since 2005 has been strongest in Green Building (424%), Transportation (140%) and Advanced Materials (54%).

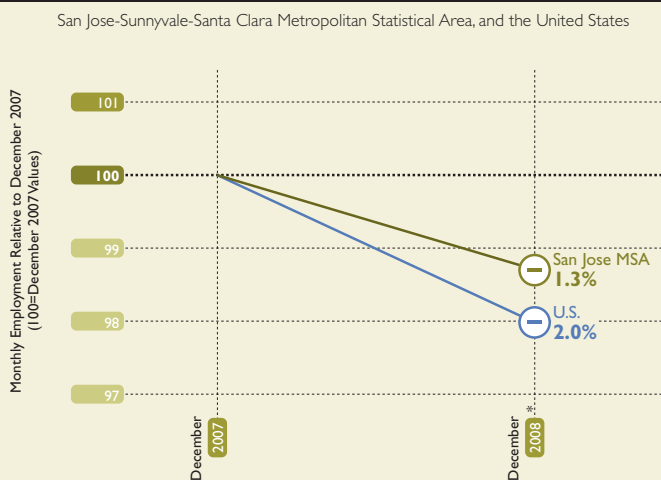
# ECONO

### Monthly Jobs



\*Data for December 2008 is preliminary  
Note: Data includes total nonfarm employment, and is not seasonally adjusted.  
Data Source: U.S. Bureau of Labor Statistics, Current Employment Statistics Survey (CES)  
Analysis: Collaborative Economics

### Change in Total Nonfarm Jobs



\*Data for December 2008 is preliminary  
Note: Data includes total nonfarm employment, and is not seasonally adjusted.  
Data Source: U.S. Bureau of Labor Statistics, Current Employment Statistics Survey (CES)  
Analysis: Collaborative Economics

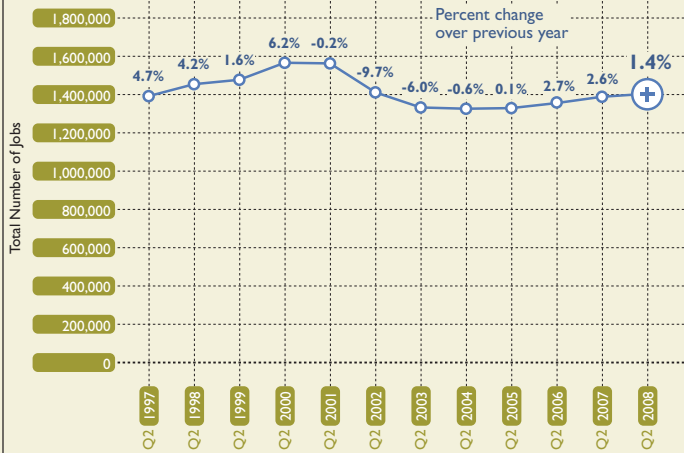
<sup>2</sup> Monthly employment figures are based on the Current Employment Statistics (CES) program survey of the U.S. Bureau of Labor Statistics.

<sup>3</sup> Total nonfarm employment reflects employment reported by all business establishments located in the region and is based on Quarterly Census of Employment and Wages (QCEW) statistics produced by the U.S. Bureau of Labor Statistics.

<sup>4</sup> It is important to note that the data on green jobs refers to positions at a business establishment and is not directly comparable to employment data that counts people who are employed (e.g. QCEW or CES).

## Quarterly Job Growth

Number of Silicon Valley Jobs in Second Quarter with Percent Change over Prior Year



Data Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages  
 Analysis: Collaborative Economics

**+ 24,578 jobs**

between Q1 2007 and Q1 2008

**+ 18,895 jobs**

between Q2 2007 and Q2 2008

### Percent Change in Jobs Q1 2007 – Q1 2008

Silicon Valley: +1.8%

Rest of CA: +0.2%

United States: +0.7%

- About the 2009 Index | 01
- Map of Silicon Valley | 02
- Table of Contents | 03
- 2009 Index Highlights | 04 | 05
- Index at a Glance | 06 | 07

PEOPLE 08 | 11

**Employment**  
12 – 15

Income  
16-17

Innovation  
18-25

**ECONOMY**

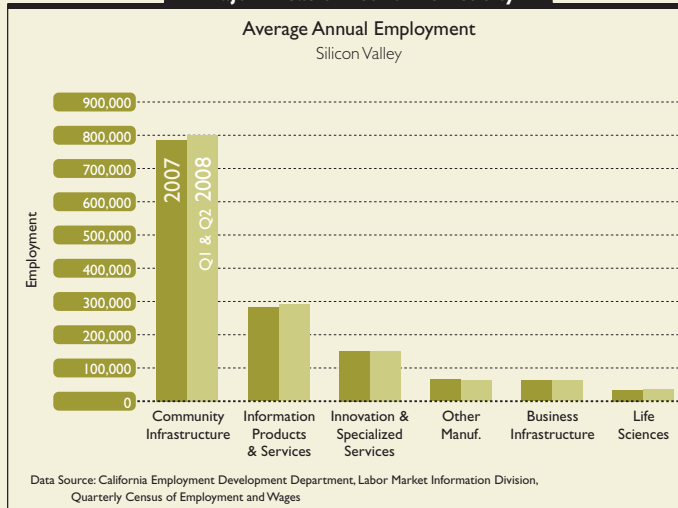
SOCIETY 26 | 37

PLACE 38 | 51

GOVERNANCE 52 | 55

- Appendices | 56 | 60
- Acknowledgments | 61

## Major Areas of Economic Activity



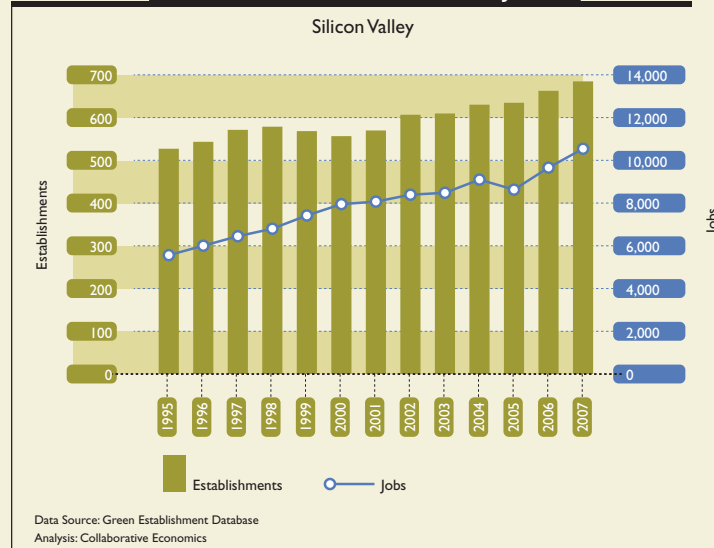
## Silicon Valley Employment Growth by Major Areas of Economic Activity Percent Change Q2 2007–Q2 2008

Information Products & Services	<b>+4.1%</b>
Life Sciences	<b>+3.0%</b>
Community Infrastructure	<b>+1.1%</b>
Innovation & Specialized Services	<b>-0.1%</b>
Other Manufacturing	<b>-1.7%</b>
Business Infrastructure	<b>-2.0%</b>

**TOTAL EMPLOYMENT** **+1.4%**

Note: Community Infrastructure includes health services, education, retail, transportation, government administration and other population-serving industries. See Appendix B for details.

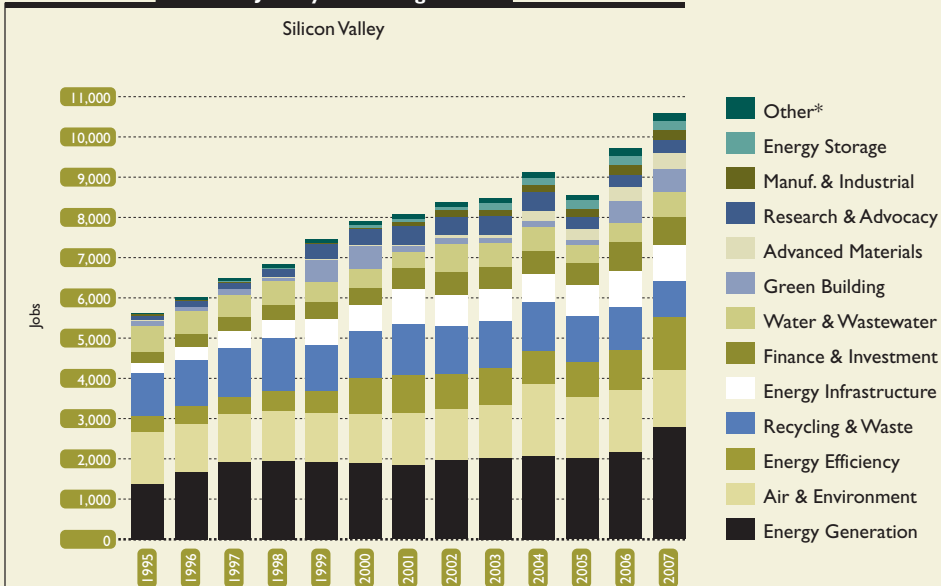
## Green Business Establishments & Jobs



### Green Growth 1995-2007 2005-2007

<b>Jobs</b>	88%	23%
<b>Establishments</b>	29%	8%

## Green Jobs by Green Segment



\*Other includes Transportation, Agriculture and Business Services  
Data Source: Green Establishment Database  
Analysis: Collaborative Economics

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE 08 | 11

Employment  
12 - 15

Income  
16-17

Innovation  
18-25

ECONOMY

SOCIETY 26 | 37

PLACE 38 | 51

GOVERNANCE 52 | 55

Appendices 56 | 60  
Acknowledgments | 61

# Income

Since 2003, incomes in the region have been rising at a faster rate than in the state or nation; however, for all three, income growth stalled in 2008.

## WHY IS THIS IMPORTANT?

Earnings growth is as important a measure of Silicon Valley's economic vitality as job growth. A variety of income measures presented together provides an indication of regional prosperity and the distribution of prosperity.

Real per capita income rises when a region generates wealth faster than its population increases. Household income distribution tells us more about concentrations of income, and if economic gains are reaching all members of the region. The median household income is the income value at the middle of all income values.

## HOW ARE WE DOING?

For the first time since 2003, Silicon Valley's per capita income slipped slightly declining 0.8%, while the national average increased very slightly (0.2%). Put in perspective, this one-year shift is overshadowed by the fact that Silicon Valley's per capita income has grown much faster (14%) than the national average (9%) over the past five years. Nonetheless, in 2008, Silicon Valley and California began to move in a different direction than the nation.

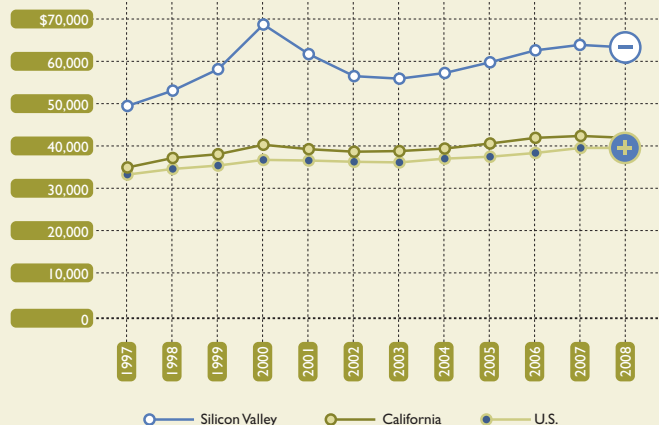
Other income figures are from 2007 and show continuing progress for Silicon Valley. Median household income rose 2% in 2007—less than California as a whole, but on par with the rest of the nation. The percentage of households earning more than \$100,000 per year continued to grow—now accounting for 42% of all households in Silicon Valley, up from 35% in 2002. Meanwhile, the proportion of households earning less than \$35,000 reached 20% - one point higher than in 2002 but continuing the decline since 2003. The proportion of households with middle incomes (\$35,000-\$99,000) contracted by two percentage points from the previous year. Since 2002 middle income households in Silicon Valley have shrunk four percent in state, while statewide and nationally, they have remained relatively stable at 44% to 46%.

Other considerations are important when assessing income gains. For example, what is the cost of living relative to income levels? Silicon Valley's cost of living is 47% higher than the nation, while its median household income is 65% higher than the median income nationally. Adding to their income, workers also earn financial benefits beyond their wages. In Silicon Valley, these contributions average about 12% of income, compared to the national average of 10%. The average employer contribution to pensions and insurance funds per employee in Silicon Valley was \$11,577 compared to \$7,149 nationally.

# ECONO

## Real Per Capita Income

2008 Dollars — Santa Clara & San Mateo Counties and U.S.



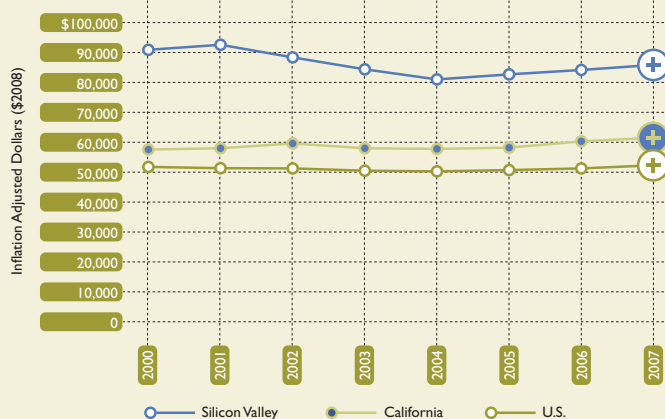
Note: Personal income is defined as the sum of wage and salary disbursements (including stock options), supplements to wages and salaries, proprietors' income, dividends, interest, and rent, and personal current transfer receipts, less contributions for government social insurance  
Data Source: Moody's Economy.com  
Analysis: Collaborative Economics

## Percent Change of per Capita Income

	2003–2008	2007–2008	
Silicon Valley	13.6%	-0.8%	⊖
California	9.0%	-0.9%	⊖
United States	8.9%	0.2%	⊕

## Median Household Income

Santa Clara & San Mateo Counties, California and U.S.

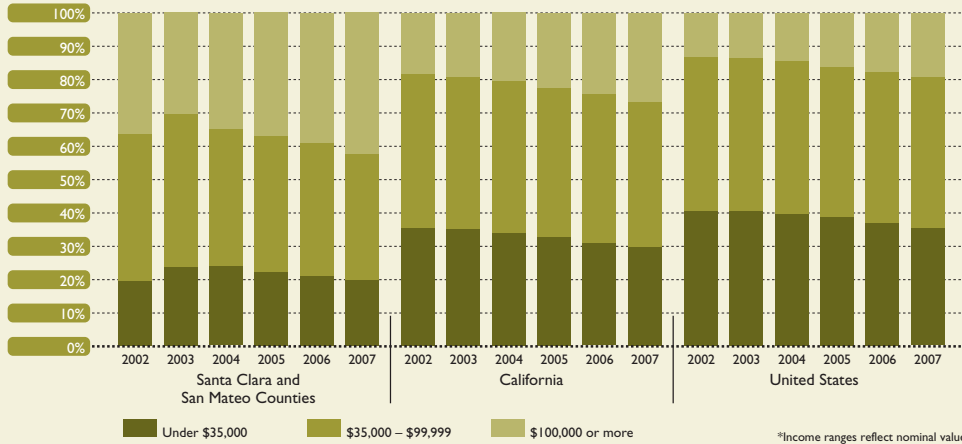


Note: Personal income is defined as the sum of wage and salary disbursements (including stock options), supplements to wages and salaries, proprietors' income, dividends, interest, and rent, and personal current transfer receipts, less contributions for government social insurance  
Data Source: U.S. Census Bureau, American Community Survey  
Analysis: Collaborative Economics

Change 2006-2007	
⊕ Silicon Valley 2.6%	
⊕ California 2.9%	
⊕ United States 1.8%	

## Income Distribution

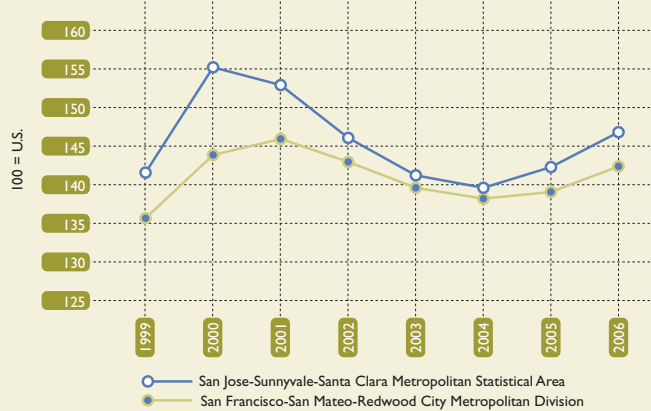
Distribution of Households by Income Ranges



Note: Household income includes wage and salary income, net self-employment income; interest dividends, or net rental or royalty income from estates and trusts; Social Security or railroad retirement income; Supplemental Security Income; public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income; excluding stock options  
 Data Source: U.S. Census Bureau, American Community Survey  
 Analysis: Collaborative Economics

## Relative Cost of Living

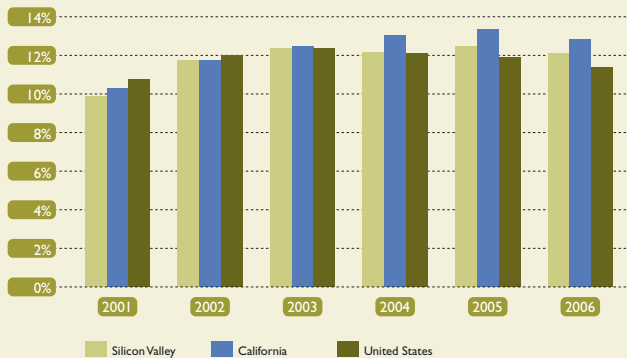
Relative to the U.S.  
San Jose and San Francisco Metropolitan Areas



Data Source: Moody's Economy.com  
 Analysis: Collaborative Economics

## Employee Contributions

Employee Contributions to Employee Pensions and Insurance Funds as a Percentage of Total Employee Compensation  
Santa Clara and San Mateo Counties, California and U.S.



Data Source: U.S. Department of Commerce, Bureau of Economic Analysis  
 Analysis: Collaborative Economics

## Average Employer Contributions to Employee Pensions and Insurance Funds per Employee in 2006

Silicon Valley	\$ 11,577
California	\$ 8,145
United States	\$ 7,149

About the 2009 Index | 01  
 Map of Silicon Valley | 02  
 Table of Contents | 03  
 2009 Index Highlights | 04 | 05  
 Index at a Glance | 06 | 07

PEOPLE | 08 | 11

Employment | 12 - 15

Income | 16-17

Innovation | 18-25

## ECONOMY

SOCIETY | 26 | 37

PLACE | 38 | 51

GOVERNANCE | 52 | 55

Appendices | 56 | 60  
 Acknowledgments | 61

*Reinventing itself again through innovation, investment in cleantech in Silicon Valley almost doubled in 2008 even while total venture capital investment dropped.*

## WHY IS THIS IMPORTANT?

Innovation drives the economic success of Silicon Valley. More than just in technology products, innovation includes advances in business processes and business models. The ability to generate new ideas, products and processes is an important source of regional competitive advantage. To measure innovation, we examine the investment in innovation, the generation of new ideas, and the value-added across the economy. Additionally, tracking the areas of venture capital investment over time provides valuable insight into the region's longer-term direction of development. The activity of mergers and acquisitions and initial public offerings indicate that a region is cultivating innovative and potentially high-value companies.

Global connectivity is a measure of a region's innovative capacity and global competitiveness. The early adoption of technology is critical for achieving and maintaining a competitive edge, and broadband internet allows better access to newer technologies and quickly developing web-based services.

## HOW ARE WE DOING?

Since 1990, value added per employee in Silicon Valley has exceeded that for California and the U.S.; however, 2008 marks the first year that California productivity was as high as the region's. After slowing since 2005, Silicon Valley's value added slipped a half percentage point while California value added increased 3.2%. Value added is measured as regional output, or gross domestic product (GDP), per employee. From 2007 to 2008, California's GDP increased 3% while employment fell less than one percent, and in Silicon Valley, both values increased by less than one percent.<sup>5</sup>

Although regional patent activity dropped slightly in 2007, the number of patents registered continues to be strong. Silicon Valley's percentages of total California and U.S. patent registrations continued to grow though at a slower rate than in the 1990s. In 2007, patents registered by primary inventors located in Silicon Valley represented 50% of all patents registered in California and 12% of all registrations with the U.S. Patent and Trade Office. Silicon Valley cities make up half of the top ten cities in the U.S. for patent registrations. Additionally, the region accounts for a growing percentage of U.S. green technology patent registrations. Increasing in share, 9% of all U.S. solar energy patents registered between 2005 and 2007 were registered in Silicon Valley.

Silicon Valley continues to collaborate with the world as our inventors work across borders and the region attracts foreign companies. While the total number of patents with Silicon Valley and foreign co-inventors dropped slightly from 2006, the percentage of all patents from the region with a foreign co-inventor increased to 11%. Japan and the United Kingdom have the largest representation

of foreign companies in Silicon Valley across all industries with 273 of 670 total foreign affiliates. By industry, Information Products & Services (290) accounts for the largest number of affiliates, followed by Other Manufacturing (134) and Community Infrastructure (128).

After rising steadily since 2005, total venture capital (VC) investment in Silicon Valley dropped 7.7% from 2007 to 2008. However, up to the third quarter of 2008, investment was on par with the same point the previous year. Nationwide, investment dropped 11.4%. While investment is slowing, Silicon Valley continues to account for 29% of total U.S. VC investment and continues to be considered an attractive location for investment.

VC investment growth in Biotechnology placed the industry second only to Software in terms of total VC investment. The top five industries with the greatest growth in 2008 are IT Services (64%), Media and Entertainment (55%), Biotechnology (36%), Industrial/Energy (21%), and Consumer Products and Services (15%). The highlighted industries in the chart represent the industries growing over the longer term.

In contrast to total VC, investment in cleantech in Silicon Valley increased 94% from 2007 – valuing almost \$1.9 billion in 2008. In 2007, Silicon Valley alone accounted for 55% of California and 31% of U.S. investment. The bulk of this investment was in energy generation followed by energy infrastructure.

Holding steady from 2006, 291 mergers and acquisitions (M&As) took place in Silicon Valley in 2007, making up roughly 22% of total California M&As and 3% of U.S. deals. Since 2003, the value of total M&A deals in the region increased 35% valuing \$35 billion in 2007. Again, cleantech in Silicon Valley poses the exception to overall U.S. trends. While M&A activity in cleantech dropped nationally, it rose 25% in Silicon Valley and 7% in California.

Initial public offerings (IPOs) have slowed dramatically globally. In 2007, there were 272 IPO pricings in the U.S. market, and in 2008 there were only 43 total. Silicon Valley represented 8% (23) of the IPO pricings in 2007 and 5% (2) in 2008. Accounting for 22% in 2007 and 28% a year later, international companies are representing a larger percentage of the world's IPOs.

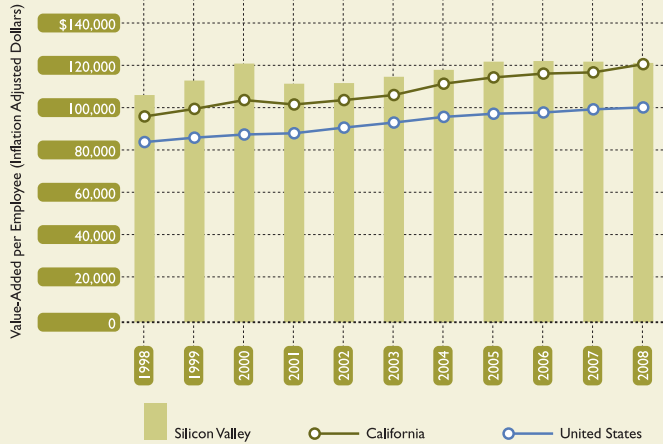
Household access to broadband in the San Francisco Bay Area has reached 99%; however, the region lags much of the state in availability of very high speed internet access.<sup>6</sup> Although 93% of Bay Area households have access to fast broadband at speeds of 5-10 Mbps, only six percent of households have access to services exceeding 10 Mbps compared to 56% statewide. All other California metro areas have far greater access to very high-speed household service: Los Angeles (95%), San Diego (91%), Inland Empire (78%), and Sacramento (52%).

<sup>5</sup> The components of value added for the last quarter of 2008 are based on projections from Moody's Economy.com  
<sup>6</sup> As of October 2007.

## Value Added

### Value Added per Employee

Santa Clara & San Mateo Counties, California and U.S.



Data Source: Moody's Economy.com  
Analysis: Collaborative Economics

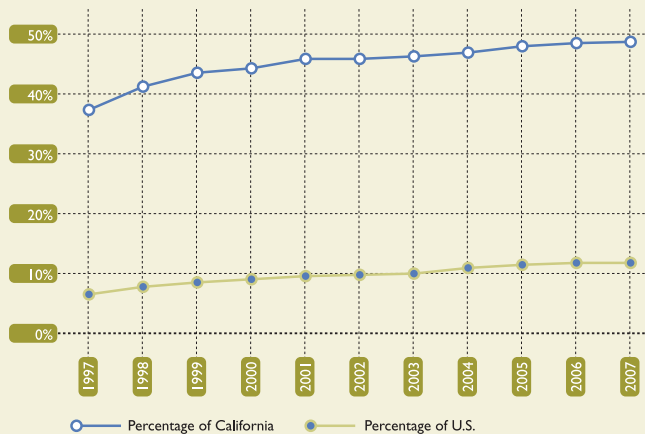
## Value Added per Employee

2007-2008

Silicon Valley	-0.5%
California	+3.2%
U.S.	+1.5%

## Patent Registrations

### Silicon Valley's Percentage of U.S. and California Patents



Data Source: U.S. Patent and Trademark Office  
Analysis: Collaborative Economics

### Number of Patents—2007

Silicon Valley	9,538
California	19,638
United States	79,556

### Top Cities for Patents Registered Patents—2007

<b>San Jose</b>	<b>2,140</b>
Austin	1,330
San Diego	1,051
<b>Sunnyvale</b>	<b>964</b>
Boise	927
<b>Palo Alto</b>	<b>836</b>
San Francisco	769
<b>Fremont</b>	<b>718</b>
Houston	701
<b>Cupertino</b>	<b>627</b>

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE 08 | 11

Employment  
12 – 15

Income  
16-17

Innovation  
18-25

ECONOMY

SOCIETY 26 | 37

PLACE 38 | 51

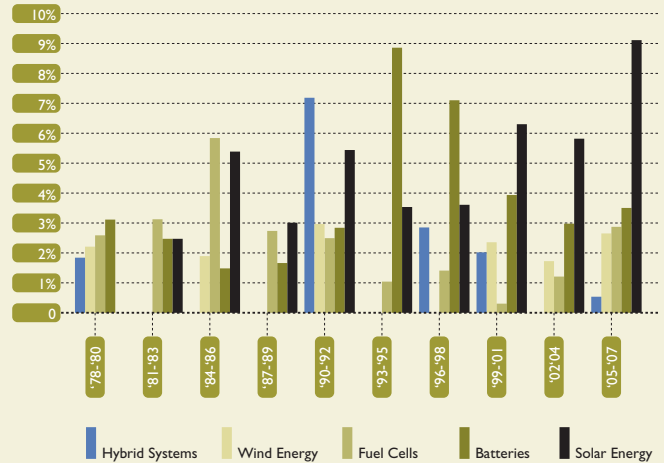
GOVERNANCE 52 | 55

Appendices 56 | 60  
Acknowledgments | 61

In 2007, Silicon Valley accounted for **20%** of all green technology patents in California

## Patents Registered by Green Technology

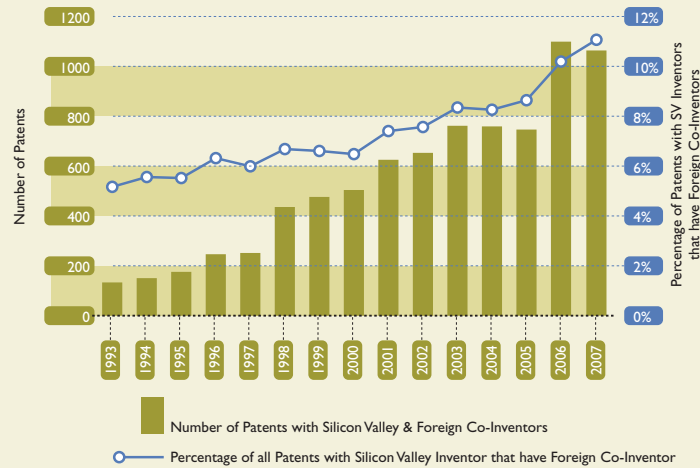
Silicon Valley Percentage of U.S. Green Technology Patents



Data Source: I790 Analytics, Patents by Technology; USPTO Patent and Trade Office  
Analysis: Collaborative Economics

## Global Patent Collaboration

Patents with Silicon Valley & Foreign Co-Inventors



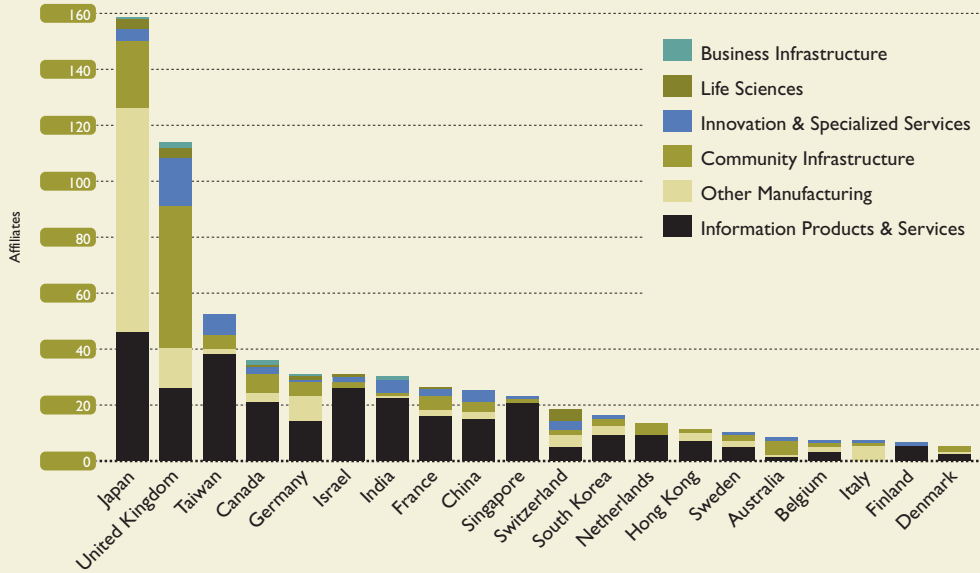
Patent counts reported here refer to all patents with an inventor from Silicon Valley, regardless of sequence number of inventor  
Data Source: U.S. Patent & Trade Office  
Analysis: Collaborative Economics

Percentage of patents with Silicon Valley and foreign co-inventors:

**10% 2006**    **11% 2007**

## Foreign Companies in Silicon Valley

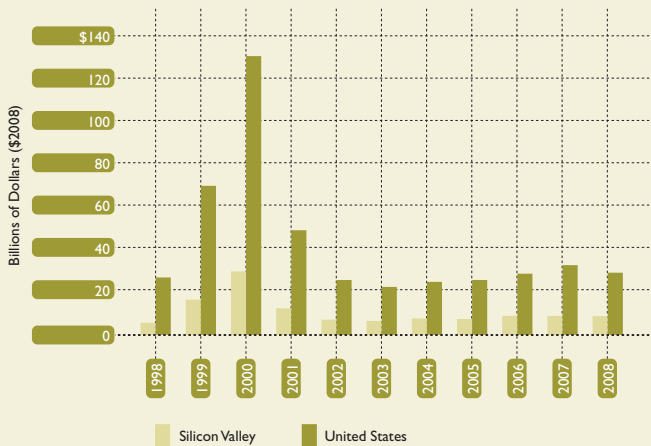
By Industry Group  
2008



Note: Other Manufacturing includes industries such as other primary and fabricated metal manufacturing, diversified agriculture and food manufacturing, space & defense manufacturing, as well as other miscellaneous manufacturing.  
Data Source: Uniworld Business Publications, Inc.  
Analysis: Collaborative Economics

## Venture Capital Dollars

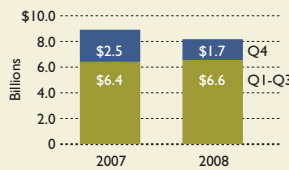
Total Venture Capital Financing in Silicon Valley Firms



Data Source: PricewaterhouseCoopers/National Venture Capital Association MoneyTree™ Report based on data:Thompson Reuters  
Analysis: Collaborative Economics

## Fourth Quarter VC Investment

Silicon Valley



VC Investment 2007–2008

Silicon Valley **-7.7%**  
United States **-11.4%**

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE 08 | 11

Employment  
12 – 15

Income  
16-17

Innovation  
18-25

ECONOMY

SOCIETY 26 | 37

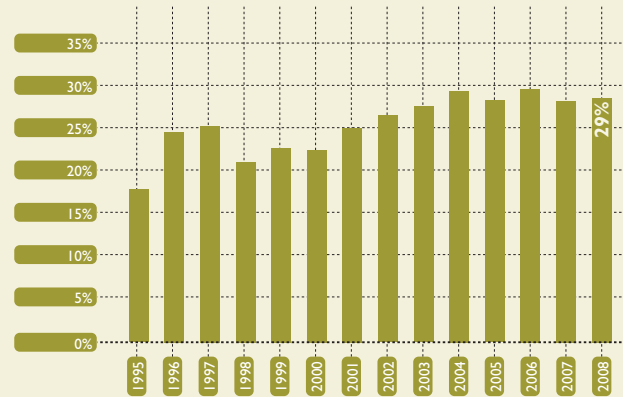
PLACE 38 | 51

GOVERNANCE 52 | 55

Appendices 56 | 60  
Acknowledgments | 61

## Percentage of Total U.S. Venture Capital

Silicon Valley Percentage of Total U.S. Venture Capital Investments



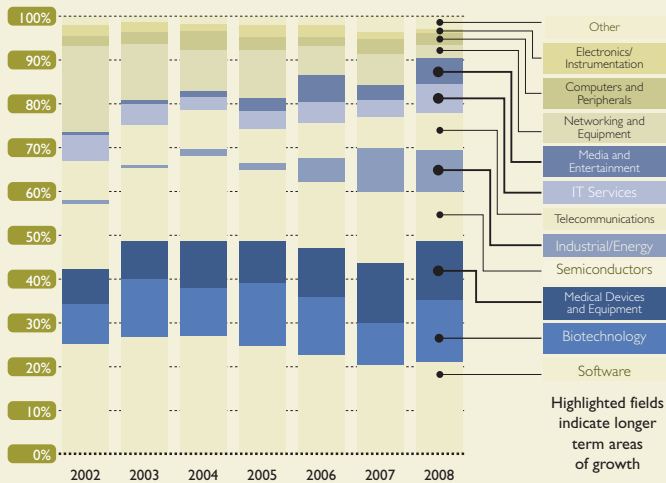
### U.S. VC in Silicon Valley

2000:	<b>22%</b>
2007:	<b>28%</b>
2008:	<b>29%</b>

Data Source: PricewaterhouseCoopers/National Venture Capital Association MoneyTree™ Report, Data: Thomson Reuters  
Analysis: Collaborative Economics

## Venture Capital by Industry

Venture Capital Investment in Silicon Valley by Industry



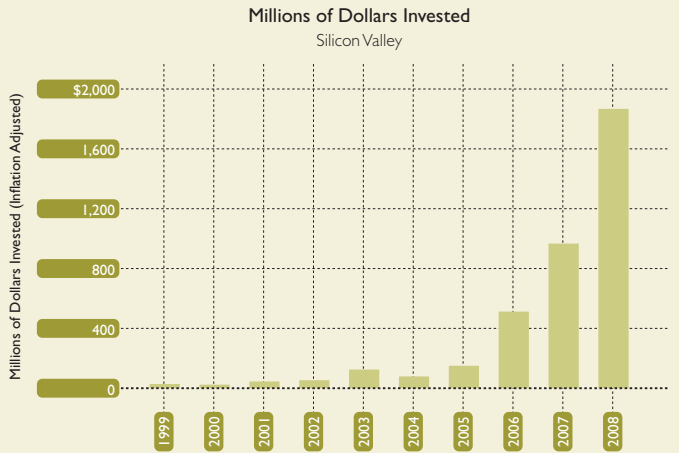
Data Source: PricewaterhouseCoopers/National Venture Capital Association MoneyTree™ Report, Data: Thomson Reuters  
Analysis: Collaborative Economics

## Top Growers in 2008

- IT Services
- Media & Entertainment
- Biotechnology

Highlighted fields indicate longer term areas of growth

## Venture Capital Investment in Clean Technology



Note: Includes data for San Mateo & Santa Clara Counties, and the cities of Fremont, Newark, Union City, and Scotts Valley  
 Data Source: Cleantech Group™, LLC (www.cleantech.com)  
 Analysis: Collaborative Economics

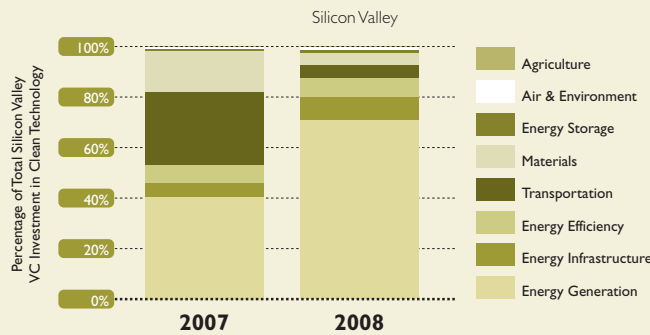
### Cleantech Investment Growth, 2007-2008

Silicon Valley **94%**  
 Rest of CA **63%**

### Silicon Valley Cleantech VC, 2008

**53%** of CA  
**31%** of U.S.

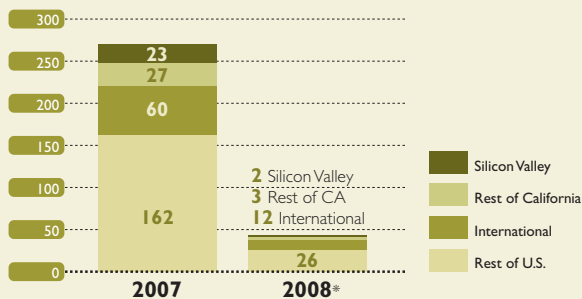
## VC Investment in Clean Technology by Segment



Note: Includes data for San Mateo & Santa Clara Counties, and the cities of Fremont, Newark, Union City, and Scotts Valley  
 Data Source: Cleantech Group™, LLC (www.cleantech.com)  
 Analysis: Collaborative Economics

## Initial Public Offerings

Total Number of IPO Pricings  
 Silicon Valley, California, U.S., and International Companies



Note: Location based on corporate address provided by IPOHome.com  
 Data Source: Renaissance Capital's IPOHome.com  
 Analysis: Collaborative Economics

\*As of December 22, 2008

### 2007-2008 IPOs

Silicon Valley **-4%**  
 Rest of CA **-3%**  
 International **+6%**  
 Rest of U.S. **+1%**

### IPO Pricings in Clean Technology

	2005	2006	2007	2008
Silicon Valley	1	1	1	1
Rest of CA	1	1	2	2
Rest of U.S.	1	10	9	4
International	1	4	5	1

Data Source: Cleantech Group™, LLC (www.cleantech.com)  
 Analysis: Collaborative Economics

About the 2009 Index | 01  
 Map of Silicon Valley | 02  
 Table of Contents | 03  
 2009 Index Highlights | 04 | 05  
 Index at a Glance | 06 | 07

PEOPLE 08 | 11

Employment  
 12 - 15

Income  
 16-17

Innovation  
 18-25

ECONOMY

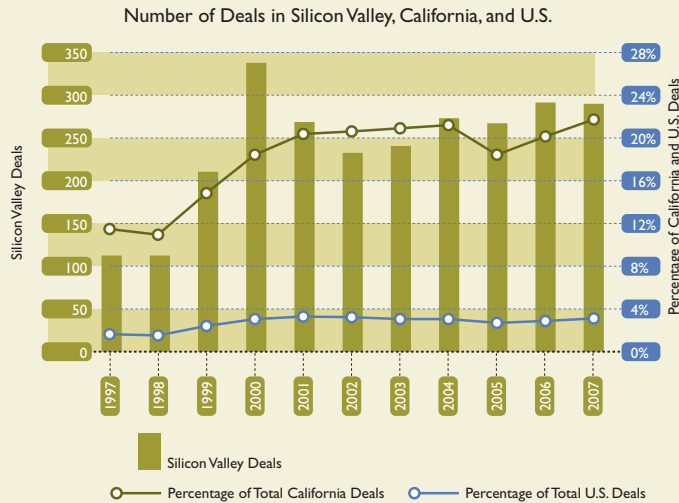
SOCIETY 26 | 37

PLACE 38 | 51

GOVERNANCE 52 | 55

Appendices 56 | 60  
 Acknowledgments | 61

## Mergers & Acquisitions



Data Source: Factset Mergerstat LLC  
Analysis: Collaborative Economics

## Mergers & Acquisitions in 2007

Number of Deals    Total Value in Millions  
(2008 dollars)

Silicon Valley	291	\$ 34,666
California	1,341	\$ 105,172
United States	9,194	\$ 999,438

Note: All merger and acquisition deals do not disclose value. Total value is based on all deals with values disclosed.

Data Source: Cleantech Group™, LLC (www.cleantech.com)  
Analysis: Collaborative Economics

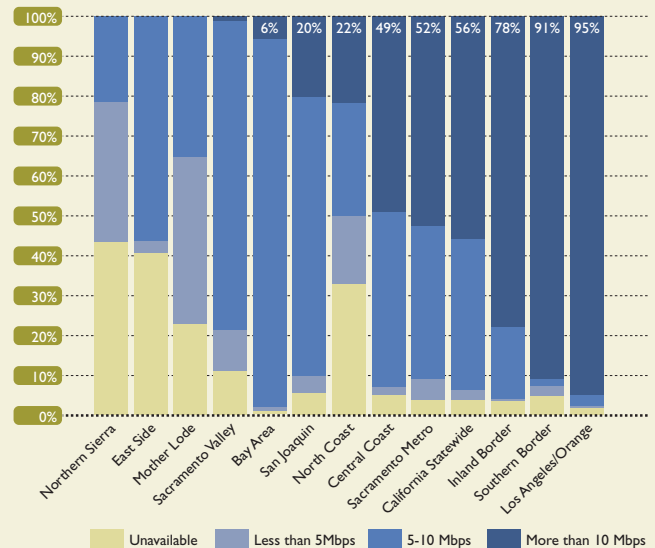
## FDA Approved Therapeutics Developed by Silicon Valley Companies

There are currently more than 200 life science companies in California devoted to research and development (R&D) for treatments for cures of HIV, diabetes and: cancers, among other disease indications. More than 30% of these companies are located in Silicon Valley. In 2008, 89 products and treatments from these Silicon Valley companies received Federal Drug Administration (FDA) approval. Additionally, companies in the region have developed more than 200 products that are in phases I & II of clinical trials.

Source: Information is based on MedTrack data for Silicon Valley and California, provided by BayBio

## Broadband Availability by Region

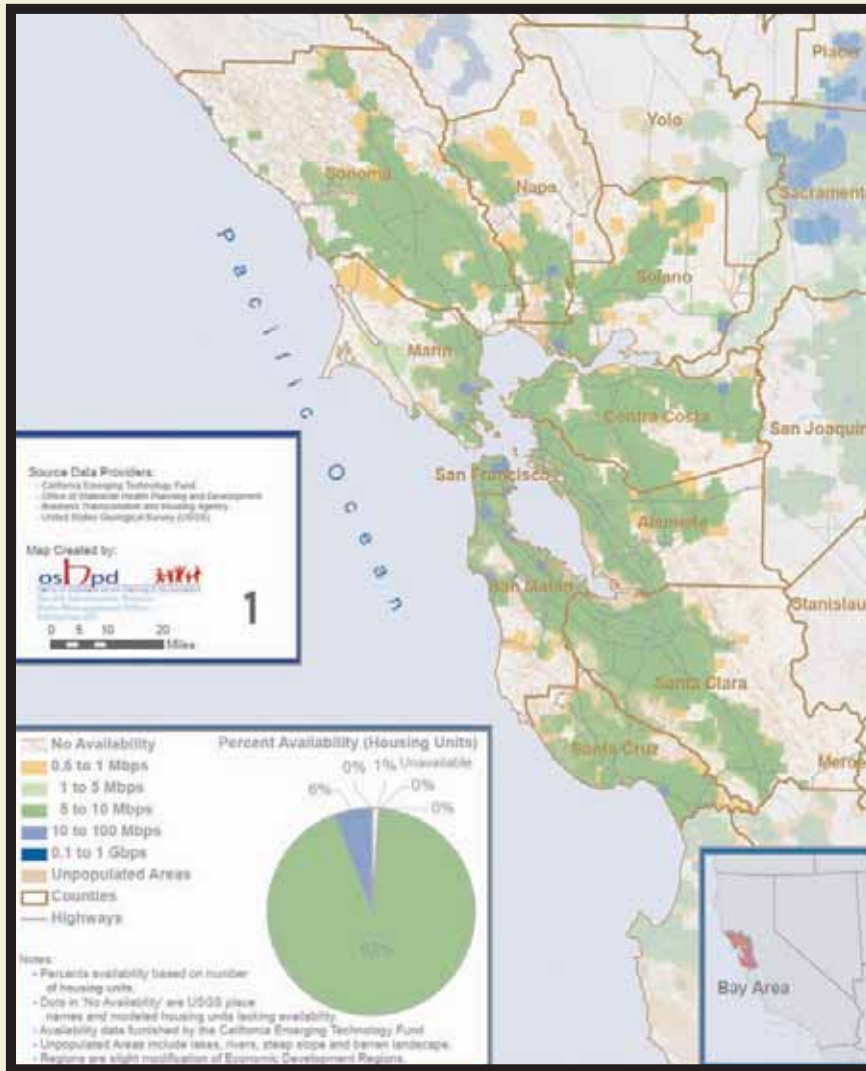
Percent of Housing Units, 2007



Note: The Bay Area includes the counties of Alameda, Contra Costa, Marin, Napa, San Benito, San Luis Obispo, Santa Clara, San Francisco, San Mateo, Solano, and Sonoma

Data Source: California Broadband Taskforce Initiative "The State of Connectivity Report," 2008, Page 33  
Analysis: Collaborative Economics

## Wireline Broadband Availability



Note: Wireline broadband includes cable, DSL, and fiber-to-the-home (FTTH)  
 Source: California Broadband Taskforce Initiative "The State of Connectivity Report," 2008, Page 38

About the 2009 Index | 01  
 Map of Silicon Valley | 02  
 Table of Contents | 03  
 2009 Index Highlights | 04 | 05  
 Index at a Glance | 06 | 07

PEOPLE 08 | 11

Employment | 12 - 15  
 Income | 16-17

Innovation | 18-25

ECONOMY

SOCIETY 26 | 37

PLACE 38 | 51

GOVERNANCE 52 | 55

Appendices | 56 | 60  
 Acknowledgments | 61

## Preparing for Economic Success

*While over half of the region's high school graduates met entrance requirements for the State's universities, graduation rates vary significantly by race/ethnicity.*

### WHY IS THIS IMPORTANT?

The future success of the region's young people in a knowledge-based economy will be determined largely by how well elementary and secondary education in Silicon Valley prepares its students for higher levels of education. In 2004, school funding in Santa Clara County was 88% of the national average. Although higher for California (93%), Santa Clara County has been bridging the gap with the nation at a faster pace than the state.

How well the region is preparing its youth for postsecondary education can be observed in graduation rates and the percentage of graduates completing courses required for entrance to the University of California (UC) or California State University (CSU). Likewise, high school drop-outs are significantly more likely to be unemployed and earn less when employed than high school graduates.

### HOW ARE WE DOING?

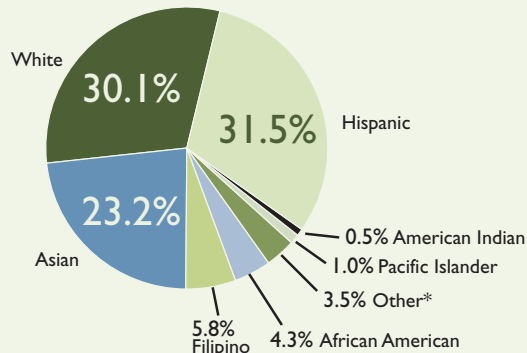
Silicon Valley high schools reported a graduation rate of 85%, and 52% of students achieved University of California requirements.<sup>7</sup>

However, educational success in the region varies by racial/ethnic group. Hispanics represent 31.5% of students and have the lowest graduation rates (and highest drop-out rates). The region has a drop-out rate of 12%. Hispanics are four-times more likely to drop out of high school than Asians; and Pacific Islanders, African Americans, and American Indians are three-times more likely.

Up 9% over the previous year, 78% of Silicon Valley's eighth graders enrolled in algebra scored in the advanced level and only 8% scored basic or below (2% increase over previous year). Statewide, students scoring at the advanced level represented 41%, a decline of 3% from the previous year, and 32% scored at basic level or below, an increase of 7% over the previous year. When enrollment is analyzed by ethnicity in Silicon Valley and statewide, Asians and Asian-related ethnicities have the highest participation rates followed by White and Hispanic. The percent of eighth graders enrolled in algebra has stayed relatively constant over the last six years. In Silicon Valley, 0.2% of all eighth graders were enrolled, slightly higher than statewide enrollment of 0.14% of eighth graders.

# SOCIETY

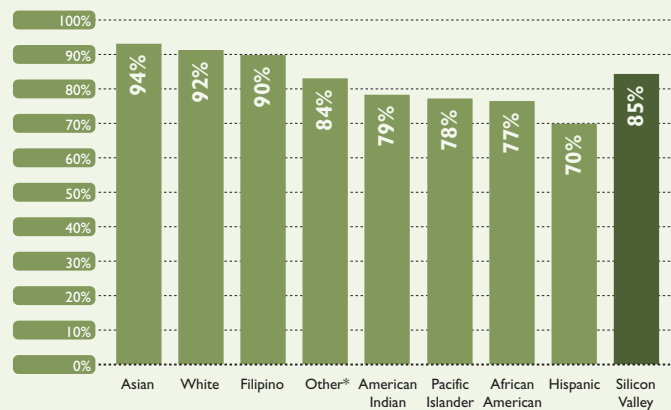
High School Student Population By Ethnicity  
Silicon Valley High Schools, 2006-2007



\*Other includes students who selected multiple or did not respond  
Data Source: California Department of Education  
Analysis: Collaborative Economics

### High School Graduation Rates

By Ethnicity  
Silicon Valley High Schools, 2006-2007



Notes: 2006/07 marks the first year in which the CDE derived graduate and drop out counts based up student level data  
\*Other includes students who selected multiple or did not respond  
Data Source: California Department of Education  
Analysis: Collaborative Economics

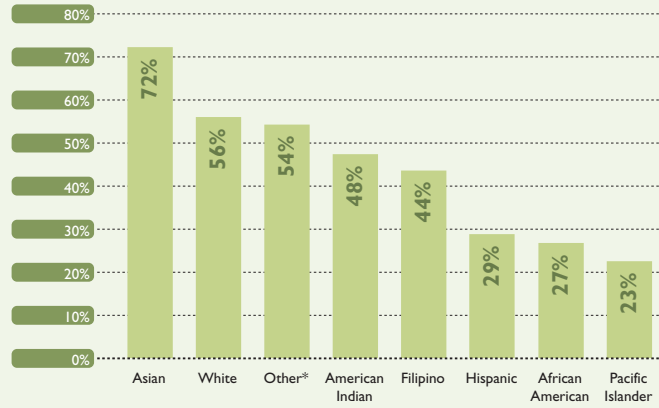
<sup>7</sup> The California Department of Education has improved the accuracy of their record-keeping through the implementation of a student-based database. Instead of calculating estimates for graduation and dropout rates, the Department now tracks each individual student through the system. Because this new series is not comparable to historical data, graduation and dropout rates are presented for the academic year 2007-2008 only.

2006–2007

**52%** of graduates met UC/CSU requirements

**Graduates with UC/CSU Required Courses**

Percentage of Graduates Who Meet UC/CSU Requirements by Ethnicity  
Silicon Valley High Schools, 2006-2007

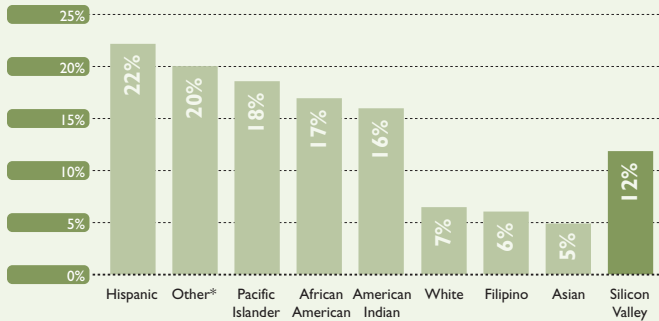


Notes: 2006/07 marks the first year in which the CDE derived graduate and drop out counts based up student level data  
\*Other includes students who selected multiple or did not respond  
Data Source: California Department of Education  
Analysis: Collaborative Economics

**High School Graduation Rates**

Dropout Rate by Ethnicity

Silicon Valley High Schools, 2006-2007

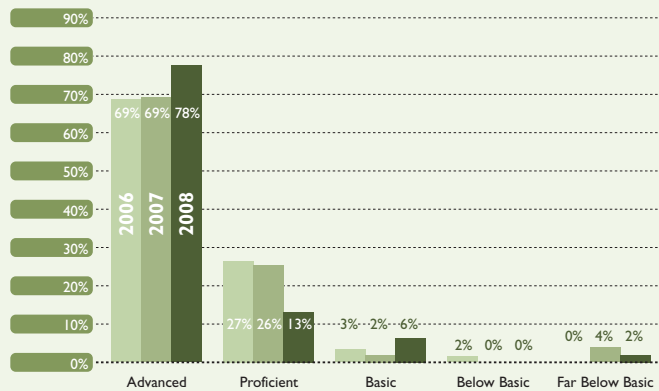


Notes: 2006/07 marks the first year in which the CDE derived graduate and drop out counts based up student level data  
\*Other includes students who selected multiple or did not respond  
Data Source: California Department of Education  
Analysis: Collaborative Economics

**12%** of high school students dropped out in 2007

**Algebra II Scores**

Percentage of Eighth Graders Tested Who Scored at Benchmarks on CST Algebra II Test  
Silicon Valley Public Schools



Data Source: California Department of Education  
Analysis: Collaborative Economics

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE 08 | 11

ECONOMY 12 | 25

**Economic Success**  
26 – 27

- Early Education 28-29
- Arts and Culture 30-31
- Quality of Health 32-35
- Safety 36-37

**SOCIETY**

PLACE 38 | 51

GOVERNANCE 52 | 55

Appendices 56 | 60  
Acknowledgments | 61

# Early Education

*Measures for early education are making slow progress.*

# SOCIETY

## WHY IS THIS IMPORTANT?

When children are subject to positive early childhood experiences that enhance their physical, social, emotional and academic wellbeing and skills, they enter school ready to learn and are more likely to perform better in later school years. Preschool attendance in high quality preschool programs is linked to higher kindergarten readiness. How prepared children are when they enter kindergarten relative to teacher expectations is an indication of children's readiness for school and future school success.

Children's school success is in part a function of increasing literacy. Research shows that children who read well in the early grades are far more successful in later years; those who fall behind often stay behind when it comes to academic achievement.<sup>8</sup> Success and confidence in reading are critical to long-term success in school.

## HOW ARE WE DOING?

There was some slippage in the early education indicators over 2007 to 2008. Pre-school enrollment was down in 2007 for the first time in three years: 24% of children 3 to 5 years of age were enrolled in pre-school, a drop from 27% in 2006. There appears to be more fluctuation in pre-school enrollment year-to-year in the region than statewide or nationally.<sup>9</sup>

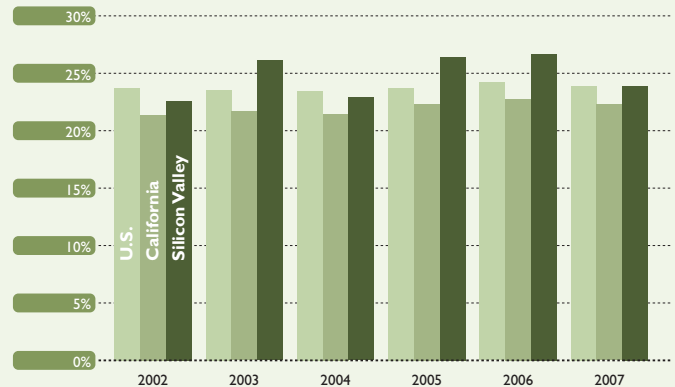
In terms of kindergarten readiness, the percentage of children significantly below teachers' desired levels of proficiency has continued to improve in Santa Clara County, but remained relatively unchanged in San Mateo County since 2005. Kindergarten Academics reflects a child's ability to engage with books and recognize letters among other skills. Modest improvement was reported in San Mateo and strong progress in Santa Clara County since 2005 (although there was little change over 2006). Following up on San Mateo County kindergarten students assessed in 2001, 2002 and 2003, Applied Survey Research recently examined the children's achievement test scores at third, fourth and fifth grades. They found that children's proficiency on Kindergarten Academics was strongly associated with their performance in both English and math at third grade.<sup>10</sup>

Third grade reading proficiency rates fell back to those of 2005. In 2008, 53% of third graders in Silicon Valley public schools scored below the national median in reading—meaning that the region's performance lags behind that of the nation. The percentage of the region's third graders in public schools who scored at the top quartile has remained about the same several years, ranging from 21-23%.

Substantial disparities persist among ethnic groups in third-grade reading proficiency. Thirty percent or more of third graders in five ethnic groups scored in the top quartile: Chinese, White (non-Hispanic), Asian Indian, Korean, and Japanese. In contrast, 40% or more third graders in African American, Pacific Islander, and Hispanic/Latino ethnic groups scored in the bottom quartile.

### Preschool Enrollment

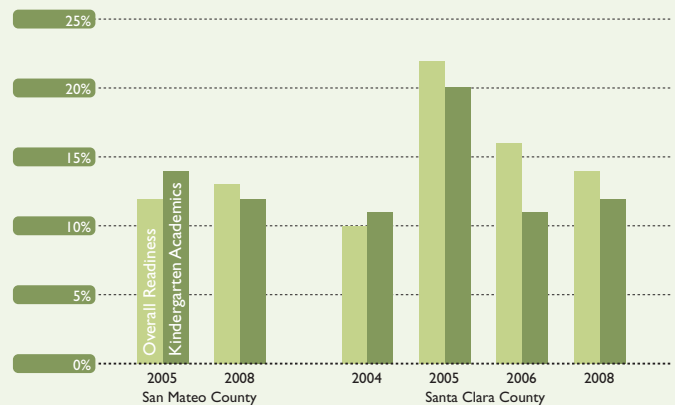
Percentage of Population 3 to 5 Years of Age Enrolled in Preschool  
Santa Clara and San Mateo Counties



Note: Data includes enrollment in preschool and nursery school  
Data Source: U.S. Census Bureau, American Community Survey  
Analysis: Collaborative Economics

### Kindergarten Readiness/Teacher Expectations

Children Significantly Below Teachers' Desired Levels of Proficiency  
Santa Clara and San Mateo Counties



Data Source: Peninsula Community Foundation, Santa Clara County Partnership for School Readiness, United Way Silicon Valley, Applied Survey Research

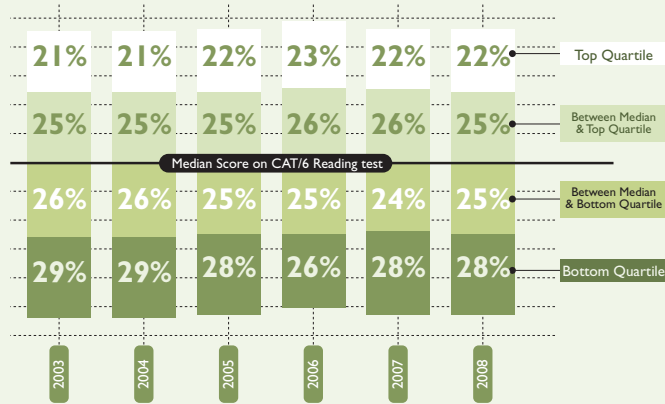
<sup>8</sup> Snow, C., M.S. Burns & P. Griffin. 1998. *Preventing Reading Difficulties in Young Children*. Washington, D.C.: National Academy Press.

<sup>9</sup> Research by the National Association of Child Care Research & Referrals Agencies indicates that working families struggle with the cost of child care and that as jobs and hours are cut, children are often taken out of a quality child care setting. <http://www.naccrra.org/policy/economy/>

<sup>10</sup> Applied Survey Research. 2008. "Does Readiness Matter? How Kindergarten Readiness Translates into Academic Success." (April).

### Third Grade Reading Ability

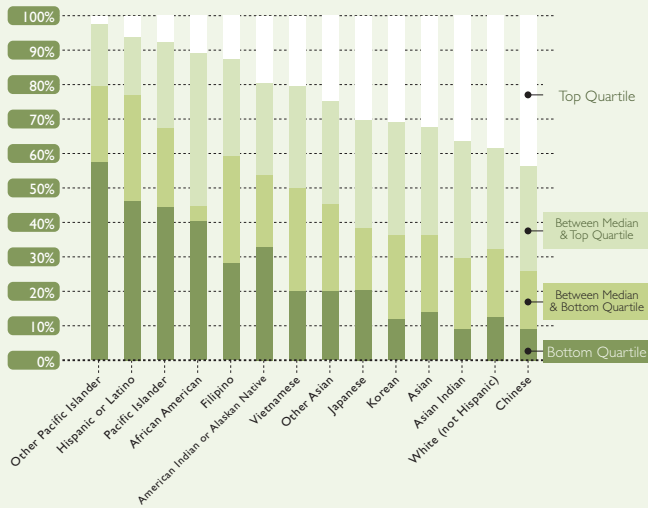
Percentage of Third Graders Scoring at National Benchmarks on CAT/6 Reading Test  
Silicon Valley Public Schools



Data Source: California Department of Education  
Analysis: Collaborative Economics

### Third Grade Reading Proficiency by Race/Ethnicity

Santa Clara County, 2008



\*Cambodian, Samoan, Native Hawaiian and Laotian not included due to small data set  
Data Source: California Department of Education  
Analysis: Collaborative Economics

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE | 08 | 11

ECONOMY | 12 | 25

Economic Success  
26 – 27

Early Education  
28-29

Arts and Culture  
30-31

Quality of Health  
32-35

Safety  
36-37

SOCIETY

PLACE | 38 | 51

GOVERNANCE | 52 | 55

Appendices | 56 | 60  
Acknowledgments | 61

## Arts and Culture

*Silicon Valley's contributions to the arts relative to income trail other metro area regions.*

# SOCIETY

### WHY IS THIS IMPORTANT?

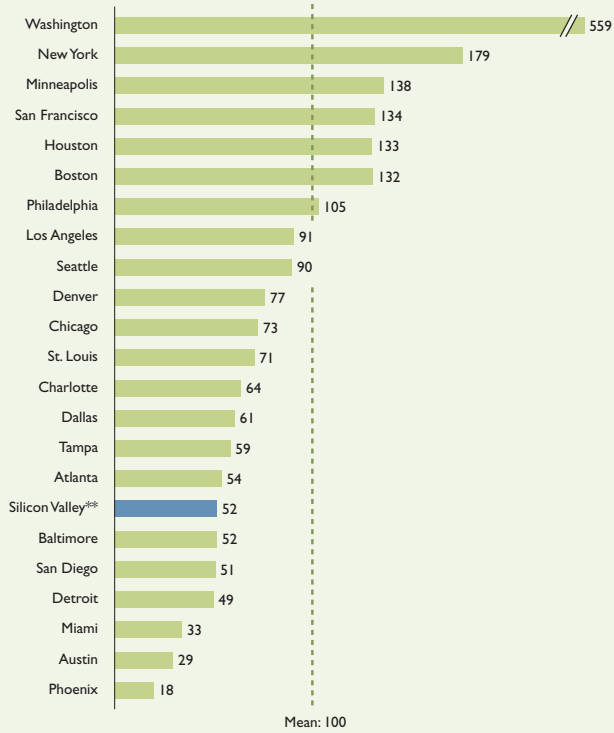
Art and culture are integral to Silicon Valley's economic and civic future. Participation in arts and cultural activities spurs creativity and increases exposure to diverse people, ideas and perspectives. Creative expression is essential for an economy based on innovation. How well the region supports its arts and cultural organizations—especially in relation to household income—gives some indication of the levels of participation and community support for the arts.

### HOW ARE WE DOING?

Silicon Valley's contributions to art and cultural organizations as a proportion of the region's income ranks far below that of leading U.S. metropolitan areas—and only about half the average of the top twenty metropolitan areas by population. Silicon Valley is on par with Detroit, Baltimore, and San Diego in terms of its relative contributions to arts and culture.

## Contributions to the Arts

Top 20 MSAs by population\* Contributions to art/culture organizations over total residents' income (index average = 100)\*\*



\* Plus metro areas of Charlotte, Denver and Austin; excluding Riverside/San Bernardino  
 \*\* San Jose-Sunnyvale-Santa Clara, California MSA & San Mateo county  
 \*\*\* Measured as contributions to art/culture related organizations divided by total income of the region's residents  
 Data Source: Sourcebook, BLS, NCCS; McKinsey analysis

About the 2009 Index | 01  
 Map of Silicon Valley | 02  
 Table of Contents | 03  
 2009 Index Highlights | 04 | 05  
 Index at a Glance | 06 | 07

PEOPLE 08 | 11

ECONOMY 12 | 25

Economic Success 26 – 27  
 Early Education 28-29  
**Arts and Culture 30-31**  
 Quality of Health 32-35  
 Safety 36-37

SOCIETY

PLACE 38 | 51

GOVERNANCE 52 | 55

Appendices 56 | 60  
 Acknowledgments | 61

# Quality of Health

*Progress is being made in child immunization, but obesity and access to health care still pose challenges.*

# SOCIETY

## WHY IS THIS IMPORTANT?

Poor health outcomes generally correlate with poverty, poor access to preventative health care, lifestyle choices, and education. Early and continued access to quality, affordable health care is important to ensure that Silicon Valley's residents are healthy and prosperous. For instance, timely childhood immunizations promote long-term health, save lives, prevent significant disability and reduce medical costs. Health care is expensive, and individuals with health insurance are more likely to seek routine medical care and to take advantage of preventative health-screening services.

Over the past two decades, obesity has risen dramatically in the United States and its occurrence is not just limited to adults – the percentage of overweight young people has more than tripled since 1980. Being overweight or obese increases the risk of many diseases and health conditions, including Type 2 diabetes, hypertension, coronary heart disease, stroke and some types of cancers. These conditions have a significant economic impact on the nation's health care system as well as the overall economy due to declines in productivity.

## HOW ARE WE DOING?

Santa Clara County has surged ahead of California in child immunization closing in on the Healthy People 2010 Objective of attaining immunization rates of 90%.<sup>11</sup> Up eight points from 2006, Santa Clara County reported in 2008 that 84% of kindergartners had been immunized by the age of 24 months. In contrast, statewide rates dropped 1% to 76% in 2008. By ethnic group, in Santa Clara County, all groups reported increased rates of immunization, and African Americans gained the most, improving rates by 16%. Comparatively, statewide, every ethnic group witnessed declines in immunizations from 2006 to 2008 with rates among Asians dropping 7%.

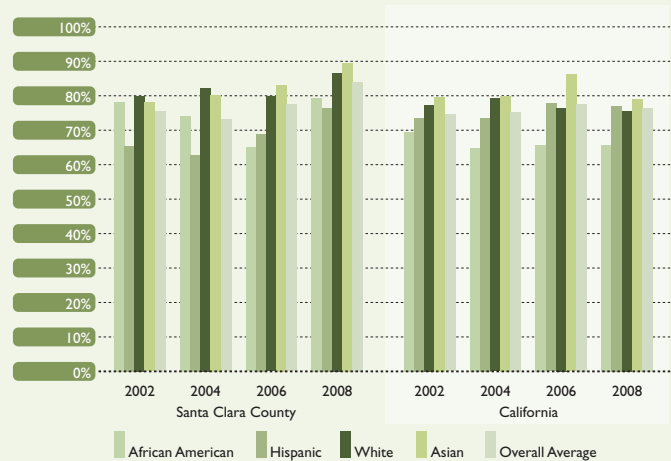
Obesity continues to be a growing problem in the region as well as the state as a whole. The percentage of overweight or obese adolescents and adults in Silicon Valley expanded from 45% in 2001 to 49% in 2007. This four-point increase represents twice the growth statewide. In contrast, three-quarters of youth in grades 5, 7, and 9 are scoring in the Health Fitness Zone which suggests there is continued improvement in youth health. Related to obesity, in 2007, 6% of the region's residents had been diagnosed with diabetes at some point. While this represents a drop of 1.2% over 2005, it is still 1% higher than in 2001.

The percentage of residents with health insurance through their employers dropped 2.5% between 2001 and 2007. While 72% of Silicon Valley residents under the age of 65 had employer-based health insurance, 10% of residents were uninsured. Between 2001 and 2007, there was moderate growth in the number of uninsured residents, residents enrolled in public health services such as the Child Health Insurance Program (CHIP) and Medicaid, as well as in the number of residents with privately purchased insurance.

After significant declines since 1996, Silicon Valley and California have seen increases in teen birth rates. Between 1996 and 2005, teen births declined 35% in California and 39% in the Silicon Valley. Reversing this long-term trend, teenage birth rates increased by nearly 5% in Silicon Valley from 2005 to 2006, double the statewide rate of nearly 2%.

### Immunization by Ethnicity

Rate of Immunization of Children at 24 Months of Age



Data Source: Santa Clara County Public Health Department - Kindergarten Retrospective Survey, California Department of Health Services  
Analysis: Collaborative Economics

### Rate of Immunization of Children at 24 Months of Age, 2008

Silicon Valley	83.7%
California	76.7%

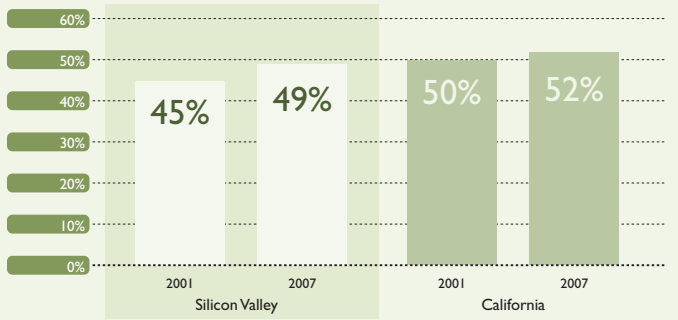
## Healthy People 2010 Objective:

**90%** of children immunized by 24 months of age

<sup>11</sup> Healthy People 2010 provides a framework for prevention for the Nation. It is a statement of national health objectives designed to identify the most significant preventable threats to health and to establish national goals to reduce these threats.

**Obesity**

**Overweight or Obese\* Adolescents and Adults**  
Silicon Valley and California



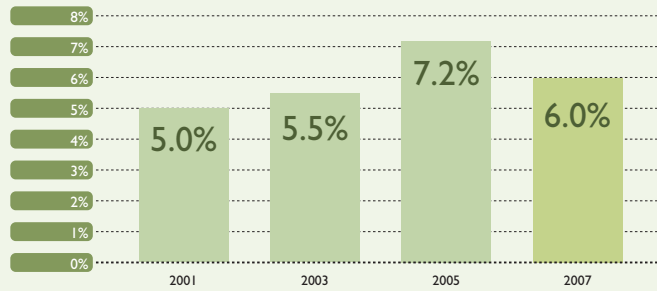
**Adolescents and Adults that are Overweight/Obese 2007**

Silicon Valley	49%
California	52%

\*For adults, "Overweight or obese" includes the respondents who have a BMI of 25 or greater. For adolescents, "Overweight or obese" includes the respondents who have a BMI in the highest 95th percentile with respect to their age and gender.  
Data Source: UCLA Center for Health Policy Research, California Health Interview Survey  
Analysis: Collaborative Economics

**Diabetes**

**Percentage of Population Ever Diagnosed with Diabetes**  
Santa Clara and San Mateo Counties



Data Source: UCLA Center for Health Policy Research, California Health Interview Survey  
Analysis: Collaborative Economics

**6%** of population  
has been diagnosed  
with diabetes

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE 08 | 11

ECONOMY 12 | 25

Economic Success 26 – 27  
Early Education 28-29  
Arts and Culture 30-31  
**Quality of Health 32-35**  
Safety 36-37

**SOCIETY**

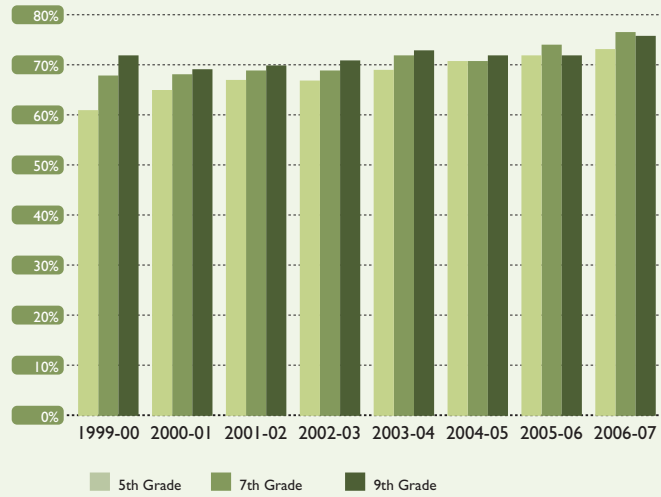
PLACE 38 | 51

GOVERNANCE 52 | 55

Appendices 56 | 60  
Acknowledgments | 61

## Youth Health

Percentage of Youth in Health Fitness Zone by Grade  
Santa Clara and San Mateo Counties



Data Source: California Department of Education  
Analysis: Collaborative Economics

## Source of Health Insurance Coverage\*

Residents under 65 years old  
Santa Clara and San Mateo Counties

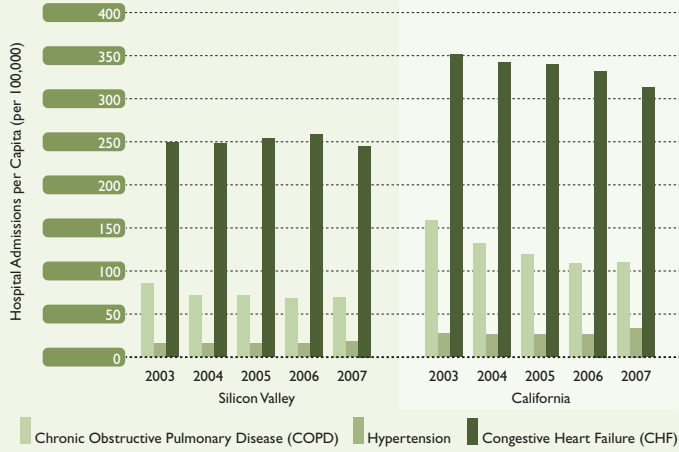


Data Source: UCLA Center for Health Policy Research, California Health Interview Survey  
Analysis: Collaborative Economics

**72%** of Silicon Valley residents have employment-based health insurance

### Hospital Admissions by Preventable Conditions

Santa Clara & San Mateo Counties and California



Data Source: State of California, Office of Statewide Health Planning and Development  
Analysis: Collaborative Economics

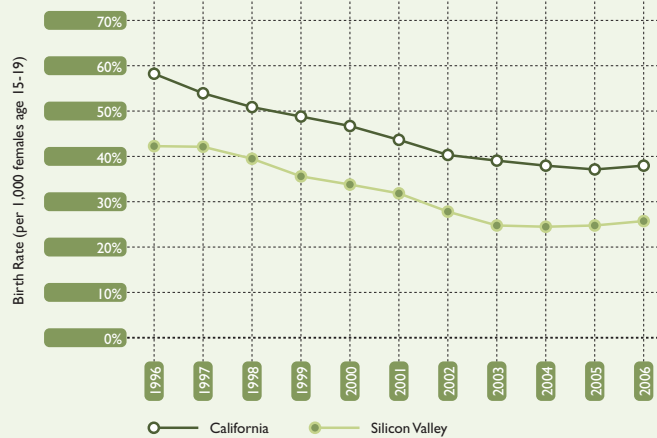
### Emergency Room Visits for Hypertension: 2006-2007

Silicon Valley	+7%
California	+25%

### Teen Birth Rate

per 1,000 Females Age 15-19

San Mateo & Santa Clara Counties, and California



Data Source: California Department of Public Health  
Analysis: Collaborative Economics

### Teenage Birth Rate 2005-2006

Silicon Valley	+5%
California	+2%

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE | 08 | 11

ECONOMY | 12 | 25

Economic Success | 26 - 27  
Early Education | 28-29  
Arts and Culture | 30-31  
**Quality of Health** | 32-35  
Safety | 36-37

SOCIETY

PLACE | 38 | 51

GOVERNANCE | 52 | 55

Appendices | 56 | 60  
Acknowledgments | 61

# Safety

*Juvenile and adult felony offenses are down and student expulsions dropped.*

# SOCIETY

## WHY IS THIS IMPORTANT?

The level of crime is a significant factor affecting the quality of life in a community. Incidence of crime not only poses an economic burden, but also erodes our sense of community by creating fear, frustration and instability. Occurrence of child abuse/neglect is extremely damaging to the child and increases the likelihood of drug abuse, poor education performance and of criminality later in life. Research has also linked adverse childhood experiences, such as child abuse/neglect, to poor health outcomes including heart disease, depression, and liver and sexually transmitted diseases. Safety for the community starts with safety for children in their homes.

## HOW ARE WE DOING?

While the rate in California continues its steady decline, the rate of child abuse in Silicon Valley has increased slightly for the fourth consecutive year. The rate of substantiated child abuse incidents in Silicon Valley increased from 6.9 to 7.1 per 1,000 people from 2006 to 2007. The most common form of substantiated abuse is child neglect.

After rising steadily since 2002, juvenile felony arrests rates have leveled off. Drug offenses dropped 3%, violent offenses dropped 2% and property offenses remained unchanged. The rate of juvenile felony arrests for the State of California is only slightly higher than that for Silicon Valley, and the state has enjoyed the same 47% decline in juvenile arrests over the past decade.

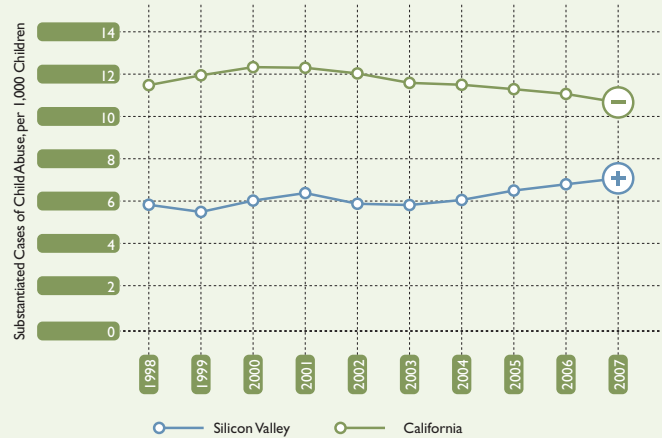
The year 2007 represents the second consecutive year of decline in adult felony arrests in Silicon Valley (-6%). Declines occurred across all three primary felony areas: Violent offenses (-5%), property offenses (-3%) and drug related offenses (-10%). Statewide, the overall adult felony arrest rate declined by 8%, though it is still substantially higher than Silicon Valley (483 more arrests per 100,000).

Silicon Valley's rate of adult felony drug offenses is 34% lower than the state's rate. For the second consecutive year, adult felony drug offenses have declined – a decrease of 10% from 2006 to 2007. California has followed this same trend, exhibiting a decline of 8% over the same period. For the first time in three years, the rate of adults in Silicon Valley receiving county drug and alcohol rehabilitation services decreased – a decline of 1% from 2006 to 2007.

For the first time in three years, juvenile drug offenses in Silicon Valley dropped 3% between 2006 and 2007. At the same time, juveniles receiving county drug and alcohol rehabilitation services decreased by 19%. After rising since 2004, student (K-12) expulsions related to violence and drugs per every 1,000 enrolled students have declined in Silicon Valley 1% and the State 3%.

### Child Abuse

Substantiated Cases of Child Abuse per 1,000 Children  
Santa Clara & San Mateo Counties and California



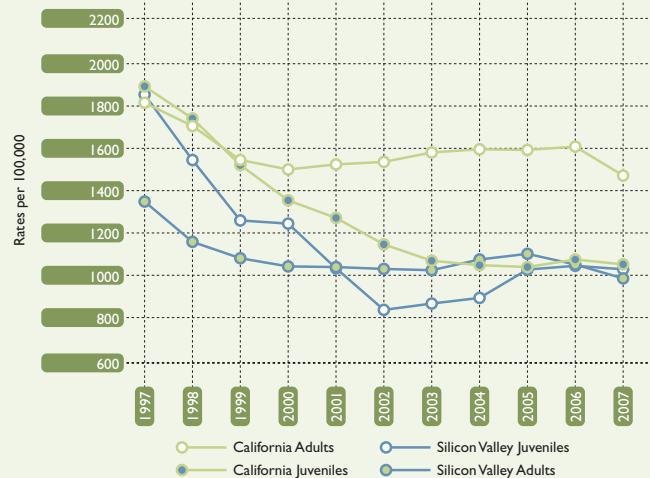
Data Source: California Department of Social Services, UC Berkeley Center for Social Services Research  
Analysis: Collaborative Economics

## Substantiated Cases

2005	2006	Percent Change
4,231	4,172	-1%

### Felony Offenses

Felony Offenses per 100,000  
Santa Clara & San Mateo Counties and California



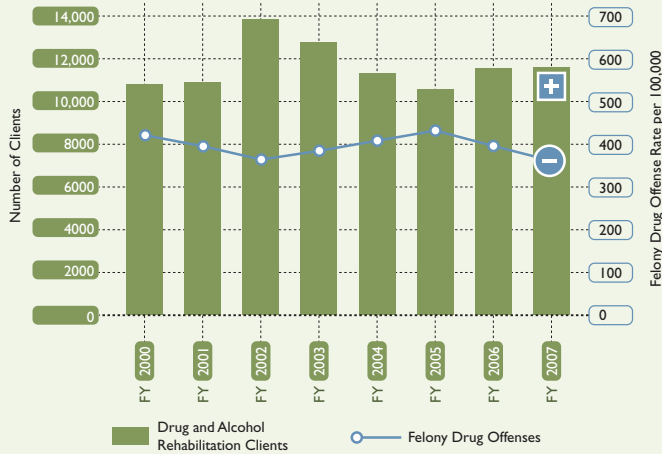
Note: Felony offenses include violent, property, and drug offenses  
Data Source: California Department of Justice  
Analysis: Collaborative Economics

## Felony Offenses 2006-2007

Adults	-6%
Juveniles	-1%

### Drug Offenses & Services – Adult

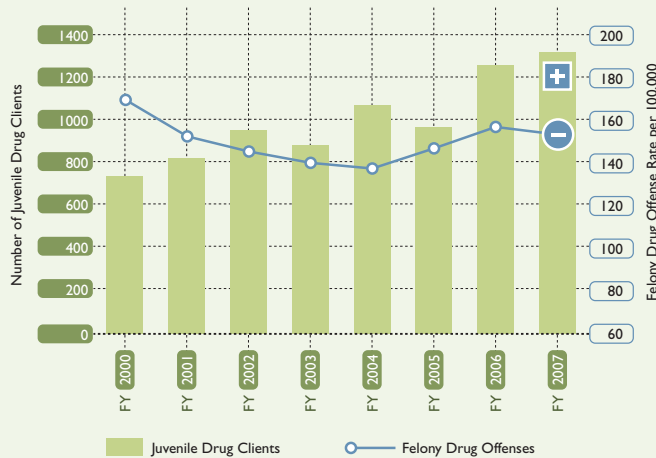
Drug & Alcohol Rehabilitation Clients & Felony Drug Offenses  
Santa Clara and San Mateo Counties



Note: Felony drug offenses data are based on calendar years 1999 through 2007  
Data Source: California Department of Justice; Santa Clara County Department of Alcohol & Drug Services; Alcohol & Drug Services Research Institute; San Mateo County Human Services Agency, Planning & Evaluation  
Analysis: Collaborative Economics

### Drug Offenses & Services – Juvenile

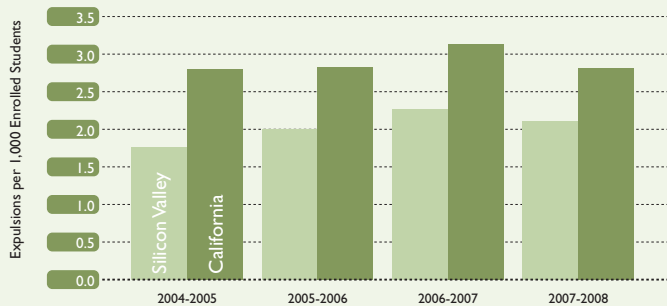
Drug & Alcohol Rehabilitation Clients & Felony Drug Offenses  
Santa Clara and San Mateo Counties



Note: Felony drug offenses data are based on calendar years 1999 through 2007  
Data Source: California Department of Justice; Santa Clara County Department of Alcohol & Drug Services; Alcohol & Drug Services Research Institute; San Mateo County Human Services Agency, Planning & Evaluation  
Analysis: Collaborative Economics

### School Expulsions Due to Violence/Drugs

Expulsions Per Enrollment  
Silicon Valley Public Schools K-12



Data Source: California Department of Education  
Analysis: Collaborative Economics

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE 08 | 11

ECONOMY 12 | 25

Economic Success 26 – 27  
Early Education 28-29  
Arts and Culture 30-31  
Quality of Health 32-35  
Safety 36-37

SOCIETY

PLACE 38 | 51

GOVERNANCE 52 | 55

Appendices 56 | 60  
Acknowledgments | 61

# Environment

*Silicon Valley's residents and policymakers are making decisions that reduce negative environmental impacts and conserve energy and natural resources.*

# PLACE

## WHY IS THIS IMPORTANT?

Environmental quality directly affects the health of all residents and the ecosystem in the region, which is in turn affected by the choices residents make about how to live—how we chose to access work, other people, goods and services, where we build our homes, how we use our natural resources, and how we enforce environmental guidelines.

Preserving open space protects natural habitats, provides recreational opportunities, focuses development, and maintains the visual appeal of our region. Protected lands include habitat and wildlife preserves, waterways, agricultural lands, flood control properties, and parks.

Shifting from carbon-based energy to renewable sources and reducing consumption together have the potential for wide-reaching impact on our environmental quality in terms of local air quality and global climate change.

Water is one of the region's most precious resources, serving a multitude of needs, including drinking, recreation, supporting aquatic life and habitat, and agricultural and industrial uses. Water is also a limited resource because water supply is subject to changes in climate and state and federal regulations. Sustainability in the long run requires that households, workplaces and agricultural operations efficiently use and reuse water.

## HOW ARE WE DOING?

Protected open space now makes up 30% of Silicon Valley's total acreage. Between 2002 and 2008, the total protected lands acreage in the region grew by 41%. The amount of protected land accessible to the public has been growing in tandem, with a 37% increase in acreage from 2002 to 2008. In 2008, total protected land acreage was approximately 17% higher than in 2007, due in part to such major additions the San Felipe Ranch (28,000 acres) and the South Valley Ranch (3,000 acres). How much of a region's land can be potentially protected depends on the population density and ruggedness of the landscape as well as other factors. For example, 49% of San Diego County's total acreage is protected open space.

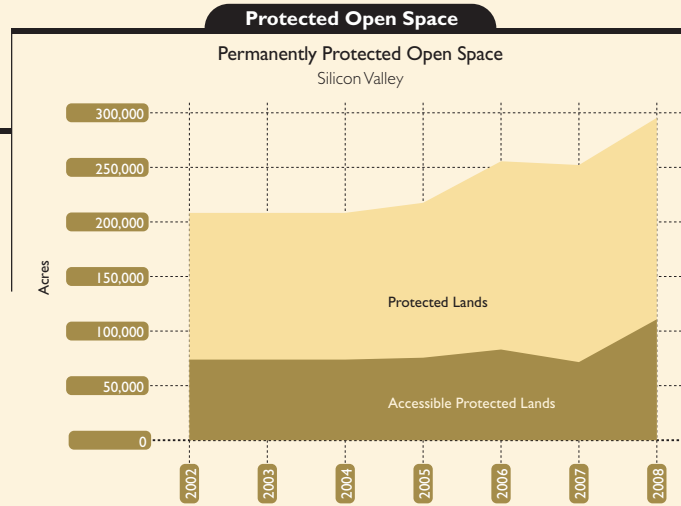
Related to protecting open space, Silicon Valley has improved its waste diversion rate from 51% to 55% since 1999. Although at 54% in 2006, statewide diversion rates are improving at a faster rate.

Silicon Valley has become a hot spot for solar in California. In 2008, Silicon Valley accounted for 13% of all new solar capacity in the state approved through the California Solar Initiative. Measured in kilowatts, solar capacity in the region increased 59% and in the state 41% over 2007. This new growth has primarily been in commercial, government and nonprofit installations.

While gross per capita water consumption grew by 4% from 2006 to 2007, Silicon Valley residents have slightly reduced their water consumption over the long term. From 2000 to 2007, gross per capita consumption dropped by 3%. In 2007, 3.55% of the total water consumed in Silicon Valley was from recycled sources, up from 1.28% in 2000.

The South Bay average mercury concentration in sport fish was 0.35 parts per million in 2006. The mercury concentration increased from 1997 to 2003 and then declined by approximately 40% from 2003 to 2006. Mercury levels in the San Francisco Bay are primarily a result of mining activity since the Gold Rush. In the South Bay, the New Almaden Mine, which closed in 1976, is a major source of mercury leakage and the Guadalupe Reservoir is very close to this. As a result, the Guadalupe River is a major source of transport of mercury and other pollutants into the Bay. Mercury loads from the Guadalupe River vary from year to year depending on rainfall intensity, water flow, as well as other factors. The mercury load from the Guadalupe River in 2007 was 2.3 kg, the lowest load since monitoring began in 2003.

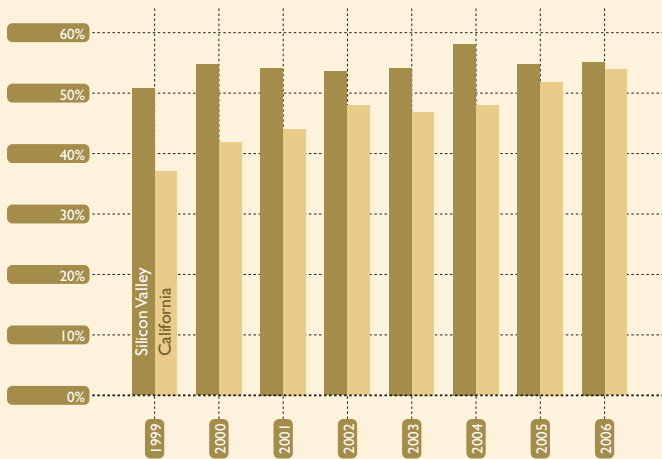
**30%** of total land  
is protected  
in Silicon Valley



Includes data for the cities of Atherton, Belmont, East Palo Alto, Foster City, Menlo Park, Portola Valley, Redwood City, San Carlos, San Mateo, Woodside, Campbell, Cupertino, Gilroy, Los Altos, Los Altos Hills, Los Gatos, Milpitas, Monte Sereno, Morgan Hill, Mountain View, Palo Alto, San Jose, Santa Clara, Saratoga, Sunnyvale, Scotts Valley, Union City, Newark, Fremont  
Data Source: GreenInfo Network  
Analysis: Collaborative Economics

### Waste Diversion Rates

Silicon Valley and California



Note: Due to the unavailability of data, 1999 data does not include the cities of Gilroy, Brisbane, South San Francisco;  
2001 data does not include the city of Los Altos; 2003 data does not include the cities of Campbell and Mountain View  
Data Source: California Integrated Waste Management Board  
Analysis: Collaborative Economics

### Waste Diversion Rates

	1999	2006
Silicon Valley	51%	55%
California	37%	54%

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE | 08 | 11

ECONOMY | 12 | 25

SOCIETY | 26 | 37

Environment  
38 – 41

Transportation  
42-43

Land Use  
44-45

Housing  
46-49

Commercial Space  
50-51

PLACE

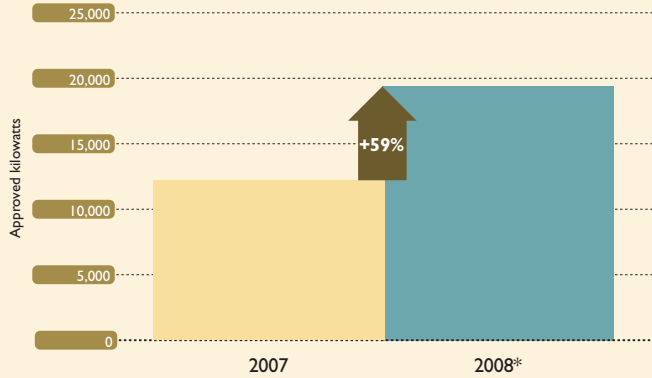
GOVERNANCE | 52 | 55

Appendices | 56 | 60  
Acknowledgments | 61

**13%** of California's solar capacity added in 2008 was in Silicon Valley

### Solar Installations

Capacity (kw) added through the California Solar Initiative  
Silicon Valley



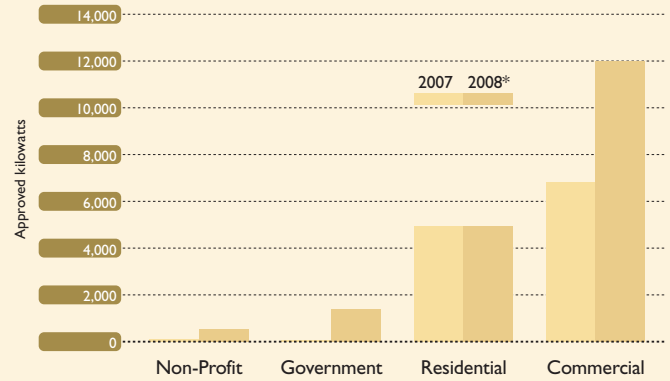
\*As of December 17, 2008  
Data Source: California Public Utilities Commission, California Solar Initiative  
Analysis: Collaborative Economics

### Growth in Solar Capacity (kw) added through the California Solar Initiative 2007-2008

Silicon Valley	<b>+59%</b>
Rest of California	<b>+41%</b>

### Solar Installations by Sector

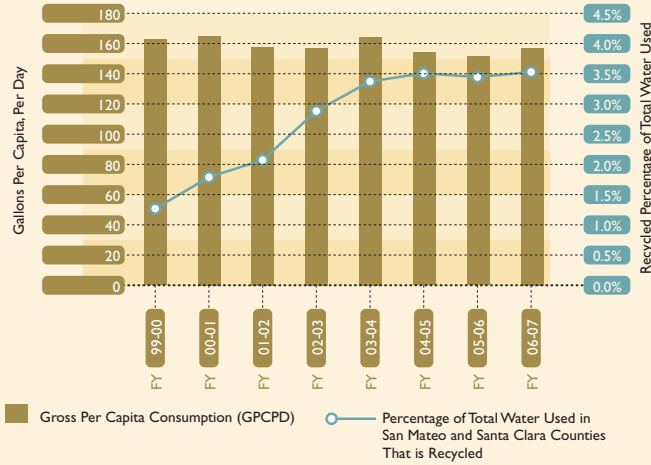
Capacity (kw) added through the California Solar Initiative  
Silicon Valley



\*As of December 17, 2008  
Data Source: California Public Utilities Commission, California Solar Initiative  
Analysis: Collaborative Economics

## Water Resources

Gross Per Capita Consumption & Percentage of Consumption from Recycled Water  
Silicon Valley BAWSCA Members



Data Source: Bay Area Water Supply & Conservation Agency Annual Survey  
Analysis: Collaborative Economics

**Per Capita Water Consumption**  
2006–2007  
**+4%**

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

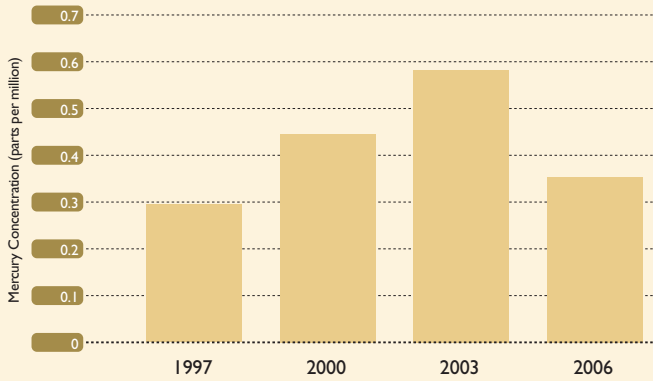
PEOPLE 08 | 11

ECONOMY 12 | 25

SOCIETY 26 | 37

## Mercury Concentration

South Bay Mercury Concentration in Sport Fish

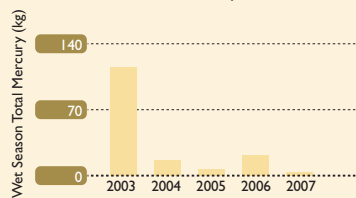


Note: Data are for white sturgeon  
Data Source: San Francisco Estuary Institute. *Containment Concentrations in Sport Fish from San Francisco Bay, 2006*

Mercury Concentration in Sport Fish (ug/g ww)

2003	<b>0.58</b>
2006	<b>0.35</b>

Mercury Loads  
Annual Loads of Mercury from the Guadalupe River



Note: Total loads for each water year (Oct 1–Sept 30). Additional matching funds for this RMP study were provided by the CER, USACT, SCVWD, and SCVURPPP.  
Data Source: San Francisco Estuary Institute. *The Pulse of the Estuary, 2008*

Environment  
38 – 41

Transportation  
42-43  
Land Use  
44-45  
Housing  
46-49  
Commercial Space  
50-51

PLACE

GOVERNANCE 52 | 55

Appendices 56 | 60  
Acknowledgments | 61

# Transportation

The region's total fossil fuel consumption is dropping, and residents are choosing alternatives such as public transit and alternative fuel vehicles.

## WHY IS THIS IMPORTANT?

The modes of transportation we use to access work, other people, goods and services, including the type of cars we drive, impacts the quality of our air and the region's transportation infrastructure. Motor vehicles are the major source of air pollution for the Bay Area. By utilizing alternative modes of transportation, such as public transit and walking, as well as choosing vehicles that are more fuel-efficient or use alternative sources of fuel, residents can reduce their ecological footprint.

## HOW ARE WE DOING?

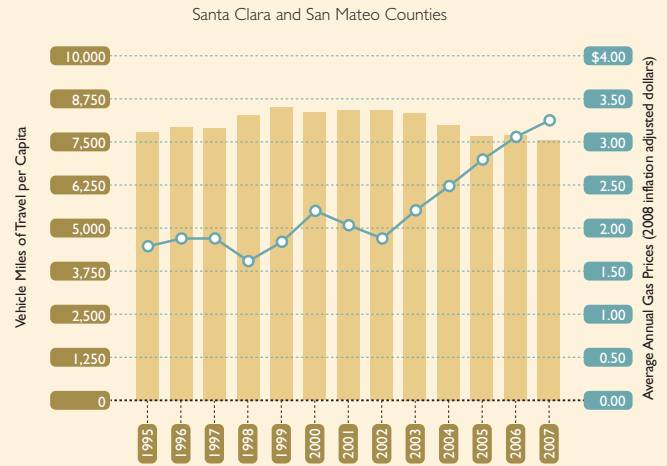
Silicon Valley is making tangible progress in changing its travel patterns. As a whole, Silicon Valley residents have been driving fewer miles since 2002, and vehicle miles of travel per capita dropped 2% between 2006 and 2007. Total fossil fuel consumption per capita has dropped 10% since 2000, compared to just 1% for California. The number of new registrations for gasoline-powered cars in Silicon Valley has dropped by a quarter since the beginning of the decade.

Silicon Valley commuters are using more alternatives to driving alone. In 2007, 75% of commuters drove alone, down from 78% four years before. In 2008, transit ridership in Silicon Valley reached a five-year high of 27 rides per person over a twelve-month period.

Silicon Valley is on the forefront of alternative fuel vehicles—particularly hybrids. The region now accounts for 15% of newly registered hybrids, 10% of electric, and 5% of natural gas vehicles in California. Alternative fuel vehicles now comprise 3.4% of all newly registered vehicles in Silicon

# PLACE

## Vehicle Miles of Travel and Gas Prices



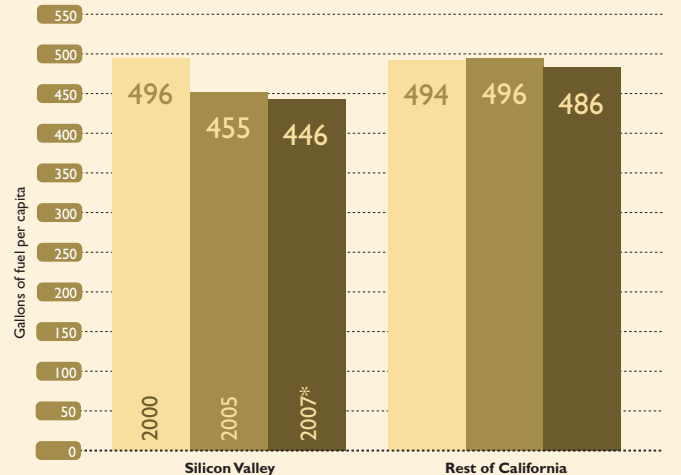
Note: Gas prices are average annual retail gas prices for California  
 Data Source: California Department of Transportation; Energy Information Administration, U.S. Department of Energy; California Department of Finance  
 Analysis: Collaborative Economics

### Percent Change 2006–2007

VMT per Capita	-2%
Gas Prices	+6%

## Fuel Consumption

### Per Capita Fuel Consumption Silicon Valley and the Rest of California



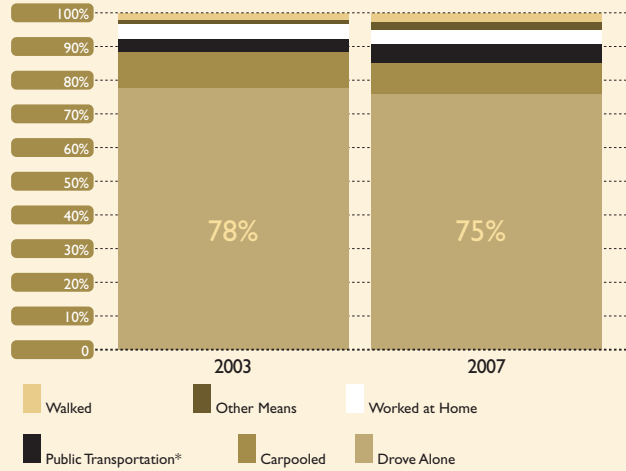
\*2007 figures are projections  
 Note: Fuel Consumption consists of gasoline and diesel fuel usage on all public roads  
 Data Source: California Department of Transportation, California Department of Finance  
 Analysis: Collaborative Economics

### Per Capita Fuel Consumption 2000–2007

Silicon Valley	-10%
Rest of California	+1%

### Means of Commute

Santa Clara and San Mateo Counties

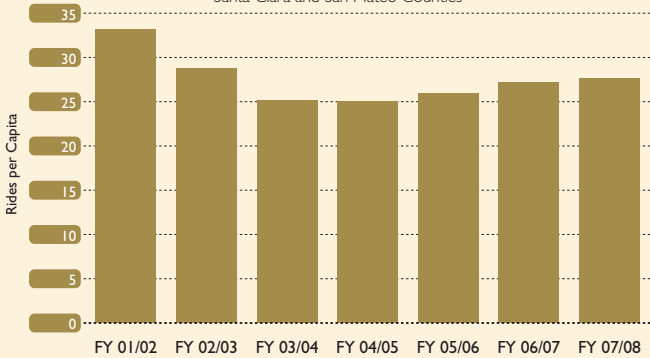


Note: Means of transportation refers to the principal mode of travel or type of conveyance that the worker usually used to get from home to work during the reference week. Other means includes taxicab, motorcycle, bicycle and other means not identified separately within the data distribution  
 \*2003 public transportation data includes taxicabs  
 Data Source: U.S. Census Bureau, American Community Survey  
 Analysis: Collaborative Economics

### Transit Use

Number of Rides per Capita on Regional Transportation System

Santa Clara and San Mateo Counties

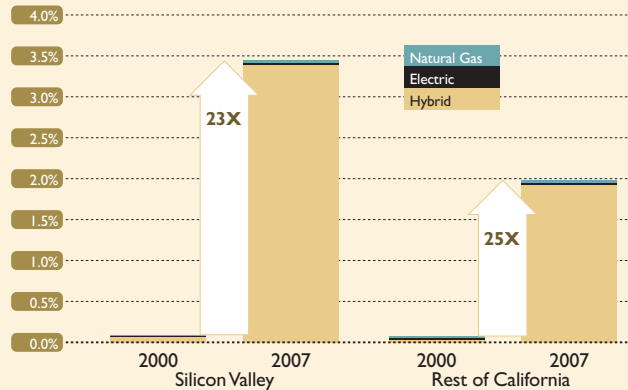


Transit Use  
+3%

Data Source: Altamont Commuter Express, Caltrain, Sam Trans, Valley Transportation Authority, California Department of Finance  
 Analysis: Collaborative Economics

### Alternative Fuel Vehicles

Alternative Fuel Vehicles as a Percentage of Newly (New & Used) Registered Vehicles by Fuel Type  
 Silicon Valley and the Rest of California



Data Source: R.L. Polk & Co.  
 Analysis: Collaborative Economics

### 2000-2007

-25% new registrations  
for gasoline vehicles

Silicon Valley % of California Newly Registered Alternative Fuel Vehicles (New and Used) - 2007

Natural Gas	5%
Electric	10%
Hybrid	15%

About the 2009 Index | 01  
 Map of Silicon Valley | 02  
 Table of Contents | 03  
 2009 Index Highlights | 04 | 05  
 Index at a Glance | 06 | 07

PEOPLE | 08 | 11

ECONOMY | 12 | 25

SOCIETY | 26 | 37

Environment  
38 - 41

Transportation  
42-43

Land Use  
44-45

Housing  
46-49

Commercial Space  
50-51

PLACE

GOVERNANCE | 52 | 55

Appendices | 56 | 60  
 Acknowledgments | 61

# Land Use

*New housing developments make more efficient use of land and are also increasingly located near transit.*

# PLACE

## WHY IS THIS IMPORTANT?

By directing growth to already developed areas, local jurisdictions can reinvest in existing neighborhoods, use transportation systems more efficiently, and preserve the character of adjacent rural communities. Focusing new commercial and residential developments near rail stations and major bus corridors reinforces the creation of compact, walkable, mixed-use communities linked by transit. This helps to reduce traffic congestion on freeways and preserve open space near urbanized areas. By creating mixed-use communities, Silicon Valley gives workers alternatives to driving alone and increases access to jobs.

## HOW ARE WE DOING?

For the first time, the Joint Venture: Silicon Valley Land Use Survey results in 2008 reflect an expanded geographic definition of Silicon Valley that includes cities northward along the U.S. 101 corridor. Silicon Valley continues to grow more efficiently in terms of residential development. The region has sustained a density of about 20 units per acre for newly-approved housing since 2005—a level twice that of 2003. Even more important, the density of newly approved housing is three times that of a decade ago.

Not only do new housing developments make more efficient use of land, they are also increasingly sited close to transit. After a period of volatility, Silicon Valley has now recorded five straight years of increasing shares of approved housing close to transit—rising from 36% in 2004 to 69% in 2008—the highest level measured during the ten years of Joint Venture's Land Use Survey.

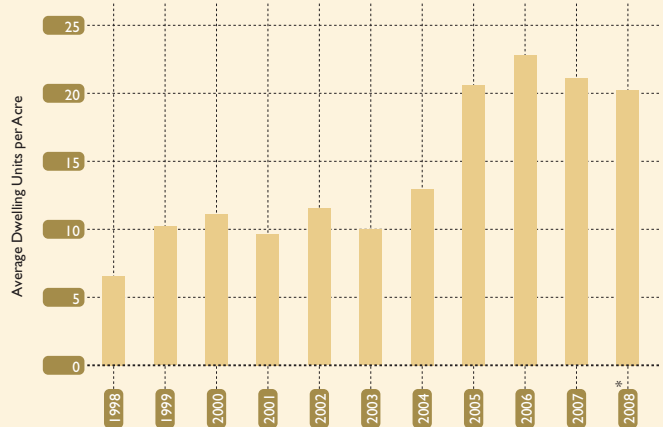
At the same time, the percentage of newly-approved non-residential development sited close to transit dropped substantially. This finding for 2008 continues a pattern of volatility that has included years of more non-residential approvals sited close to transit (e.g., 2001, 2003, 2004, 2005, and 2007) and years of fewer approvals close to transit (e.g., 2000, 2002, 2006).

### *Adoption of Green Building Policies*

As of 2008, 19 cities in the region (of the 30 cities that participated in Joint Venture's 2008 Land Use Survey) reported having adopted green building codes. In nine of the cities, the green building codes are mandatory, and incentives and sanctions are in place for enforcing the codes.

### Residential Density

Average Units Per Acre of Newly Approved Residential Development  
Silicon Valley



\*2008 data includes responses from three new cities: Burlingame, Millbrae, and San Bruno  
Data Source: City Planning and Housing Departments of Silicon Valley  
Analysis: Collaborative Economics

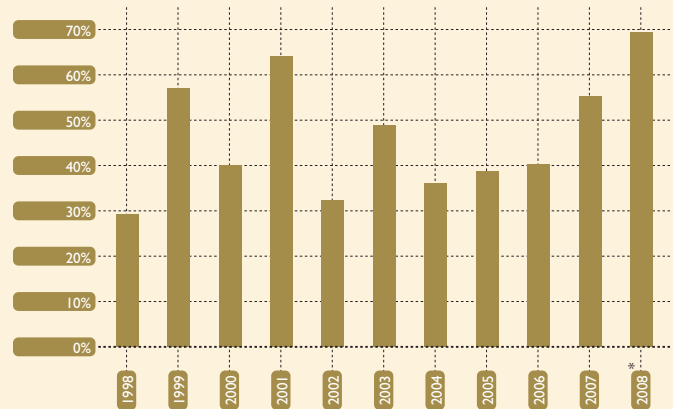
### 1998–2008

Residential Development

**3x more dense**

### Housing Near Transit

Percentage of New Housing Units Approved That Will Be Within 1/4 Mile of Rail Stations or Major Bus Corridors  
Silicon Valley



\*2008 data includes responses from three new cities: Burlingame, Millbrae, and San Bruno  
Data Source: City Planning and Housing Departments of Silicon Valley  
Analysis: Collaborative Economics

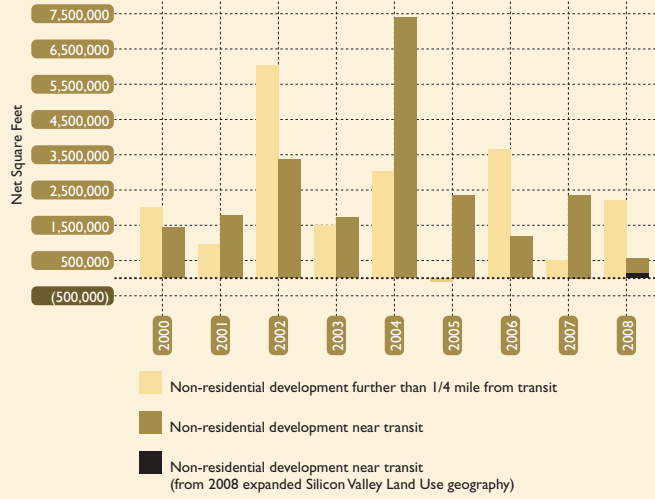
**+14%**

Housing built near transit

**76%** of all non-residential development is not near transit

**Development Near Transit**

Change in Non-Residential Development Near Transit  
Silicon Valley



\*2008 data includes responses from three new cities: Burlingame, Millbrae, and San Bruno  
Data Source: City Planning and Housing Departments of Silicon Valley  
Analysis: Collaborative Economics

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE 08 | 11

ECONOMY 12 | 25

SOCIETY 26 | 37

Environment 38 – 41  
Transportation 42-43  
**Land Use 44-45**  
Housing 46-49  
Commercial Space 50-51

**PLACE**

GOVERNANCE 52 | 55

Appendices 56 | 60  
Acknowledgments | 61

# Housing

*The national mortgage crisis has hit the region particularly hard, but rental rates increased at a slower rate.*

# PLACE

## WHY IS THIS IMPORTANT?

The affordability of housing affects a region's ability to maintain a viable economy and high quality of life. Lack of affordable housing in a region encourages longer commutes, which diminish productivity, curtail family time and increase traffic congestion. Lack of affordable housing also restricts the ability of crucial service providers—such as teachers, registered nurses and police officers—to live in the communities in which they work. The current mortgage crisis is greatly adding to housing pressures across the country, and statistics that emerge in the coming years will likely reveal rising rates of homelessness.

## HOW ARE WE DOING?

The national mortgage crisis has hit the Valley particularly hard. Home foreclosure sales went up faster in Silicon Valley (184%) than California as a whole (126%) in 2008. The number of foreclosure sales rose from 2,429 in 2007 to 6,900 in 2008. The correction in the housing market has meant dropping sale prices. While home prices in Silicon Valley have dropped less than other major regions of California, declining home values have reduced the net worth of many households. Recent reports indicate that falling values are fueling sales growth. In December 2008, 41.2% of sales in Santa Clara County and 27.3% in San Mateo County were of homes previously foreclosed upon.<sup>12</sup>

Housing affordability improved somewhat for first-time homebuyers in 2008—the first time affordability improved since 2003. However, affordability actually improved more in other California regions because of sharper price decreases. As a result, Silicon Valley has now become the least affordable region for housing in California—with less than 30% of first-time homebuyers able to afford a median-priced home.

At the same time, the region approved far more housing units in 2008 than in any year over the past decade. Over 25,000 new housing units were approved for construction. In addition, more affordable housing units were approved in 2008 than in any year since 2003. However, only 5% of all housing units approved (1,404) were classified as affordable.

The situation with rental housing appears to be somewhat better. After a large increase in apartment rental rates of 7.8% between 2006 and 2007, rates rose only 2% between 2007 and 2008. This rate of increase is closer to keeping pace with increases in median income (which grew 2.6% between 2006 and 2007). Early reports for the fourth quarter of 2008 suggest that Bay Area rents are beginning to dip, sliding 2% from the previous quarter in the San Jose-Sunnyvale-Santa Clara MSA.<sup>13</sup>

The number of homeless people in Santa Clara County decreased from 7,491 in 2005 to 7,202 in 2007. In 2007, the largest age group was people 41-50 years old (29%). The homeless population is primarily Caucasian (36%) and Hispanic (27%). The vast majority (77%) of the region's homeless have no more than a high school diploma. A convening of 30 safety net providers by the Silicon Valley Community Foundation in August 2008 revealed that the region's providers of urgent needs are serving double and sometimes triple the number of clients they did just one year before. While 70% of organizations reported an increase in need, only 20% reported increased revenues.<sup>14</sup>

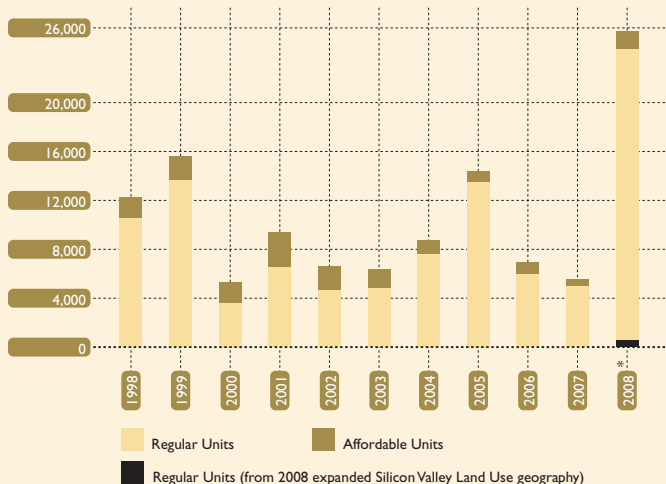
<sup>12</sup> Said, C. 2008. "Foreclosures fuel home sales surge." San Francisco Chronicle, January 22, 2008. A1.

<sup>13</sup> Temple, J. 2008. "Bay Area rental rates dip – finally." San Francisco Chronicle, January 22, 2008. C1.

<sup>14</sup> "The New Face of Need." (December 2008). Silicon Valley Community Foundation.

### Building Affordable Housing

Total New Housing Units Approved, Including New Affordable Housing Units  
Silicon Valley



Percentage of new housing that is affordable

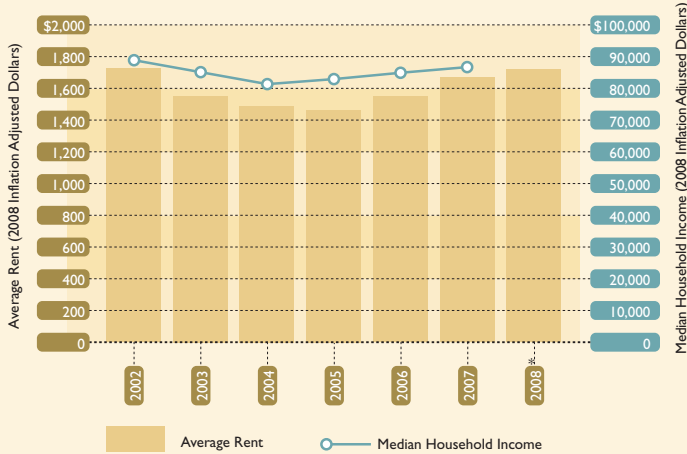
2007 **10%**

2008 **5%**

\*2008 data includes responses from three new cities: Burlingame, Millbrae, and San Bruno  
 Data Source: City Planning and Housing Departments of Silicon Valley  
 Analysis: Collaborative Economics

## Rental Affordability

Apartment Rental Rates at Turnover Compared to Median Household Income  
Santa Clara and San Mateo Counties



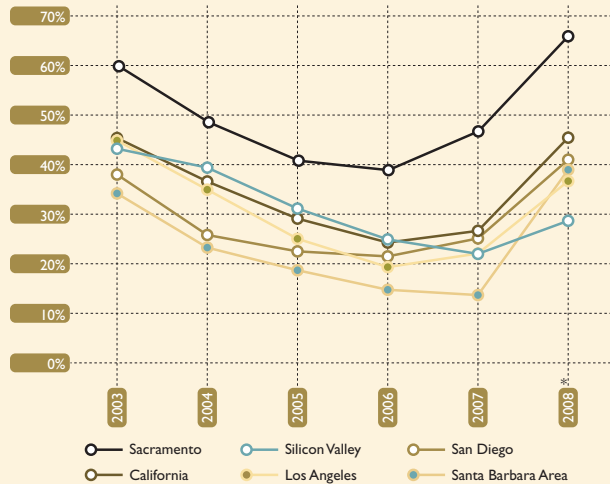
\* Estimate based on Quarters 1-3, 2008  
Data Source: Real Facts, United States Census Bureau, American Community Survey  
Analysis: Collaborative Economics

### 2005-2008

Average Rent **+17%**

## Home Affordability

Percentage of Potential First-Time Homebuyers That Can Afford to Purchase a Median-Priced Home  
Silicon Valley & Other California Regions



\* Estimate based on Quarters 1-2, 2008  
Data Source: California Association of Realtors, Home Affordability Index; DataQuick Information Systems  
Analysis: Collaborative Economics

Percentage of first-time homebuyers that can afford the median priced home in 2008

**29%** Silicon Valley

**45%** California

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE | 08 | 11

ECONOMY | 12 | 25

SOCIETY | 26 | 37

Environment  
38 - 41

Transportation  
42-43

Land Use  
44-45

**Housing  
46-49**

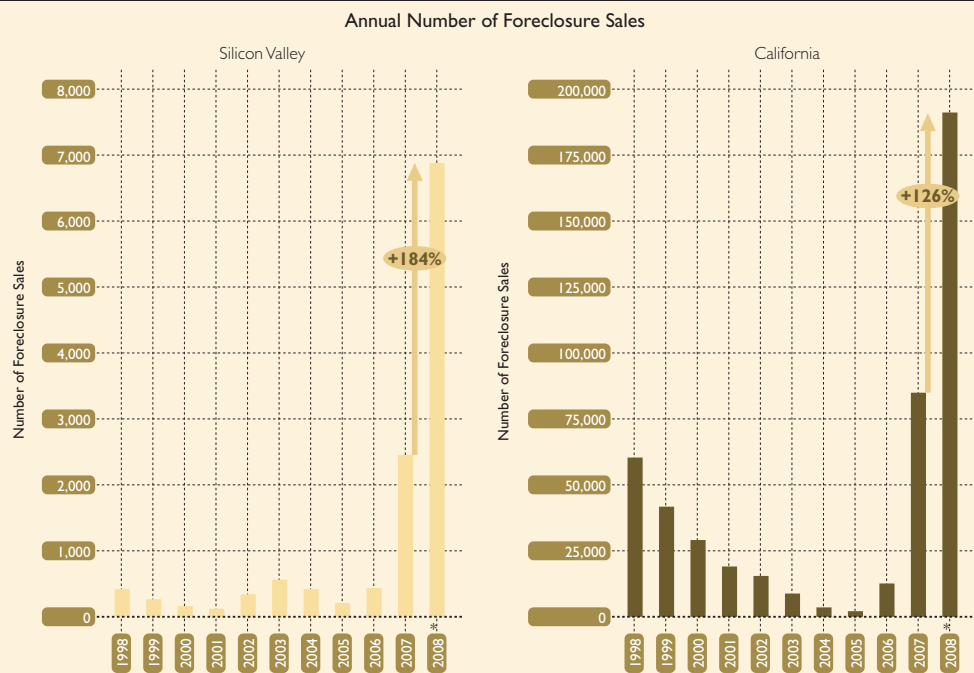
Commercial Space  
50-51

PLACE

GOVERNANCE | 52 | 55

Appendices | 56 | 60  
Acknowledgments | 61

## Residential Foreclosure Activity

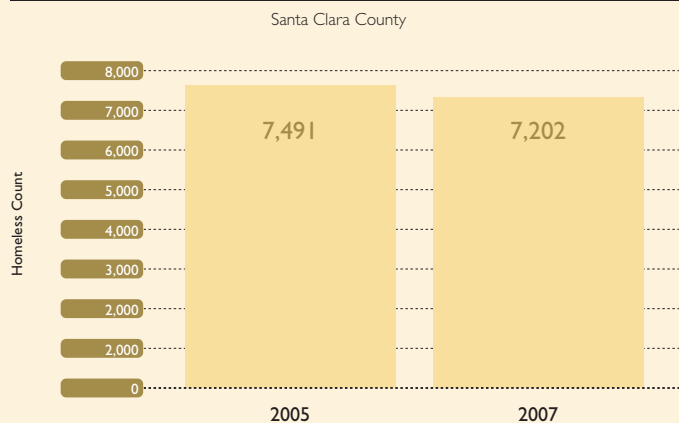


\* Estimate based on Quarters 1-3, 2008  
 Data Source: DataQuick Information Systems  
 Analysis: Collaborative Economics

## Number of Foreclosure Sales

	2007	2008	Percent Change
Silicon Valley	2,429	6,900	+184%
California	84,652	191,005	+126%

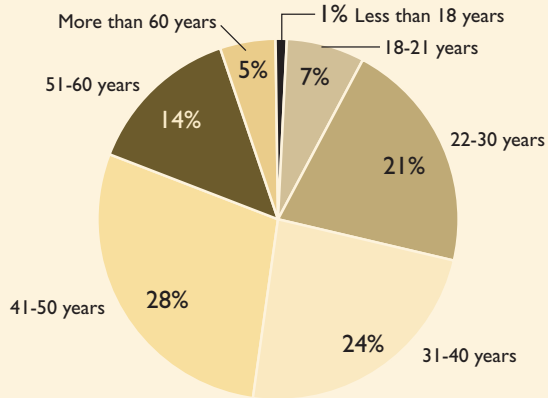
## Trends in Homelessness



Data Source: 2007 Santa Clara County Homeless Census and Survey, Applied Survey Research  
 Analysis: Collaborative Economics

### Trends in Homelessness by Age

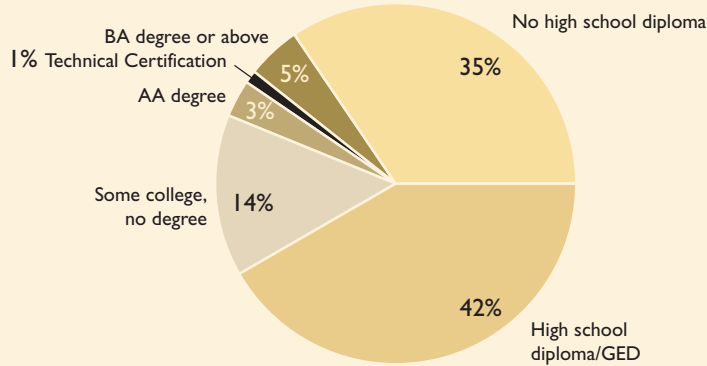
Santa Clara County – 2007



Data Source: 2007 Santa Clara County Homeless Census and Survey, Applied Survey Research  
Analysis: Collaborative Economics

### Trends in Homelessness by Education Attainment

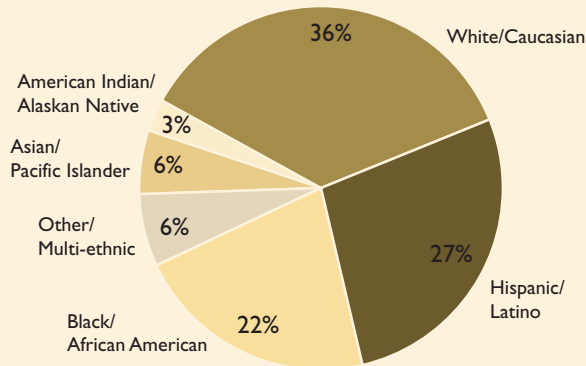
Santa Clara County – 2007



Data Source: 2007 Santa Clara County Homeless Census and Survey, Applied Survey Research  
Analysis: Collaborative Economics

### Trends in Homelessness by Ethnicity

Santa Clara County – 2007



Data Source: 2007 Santa Clara County Homeless Census and Survey, Applied Survey Research  
Analysis: Collaborative Economics

- About the 2009 Index | 01
- Map of Silicon Valley | 02
- Table of Contents | 03
- 2009 Index Highlights | 04 | 05
- Index at a Glance | 06 | 07

PEOPLE 08 | 11

ECONOMY 12 | 25

SOCIETY 26 | 37

- Environment 38 – 41
- Transportation 42-43
- Land Use 44-45
- Housing 46-49**
- Commercial Space 50-51

PLACE

GOVERNANCE 52 | 55

- Appendices 56 | 60
- Acknowledgments | 61

# Commercial Space

After slowing since the end of 2007, demand for commercial space dropped precipitously in the last quarter of 2008, and vacancies shot up across all property types.

## WHY IS THIS IMPORTANT?

This indicator tracks the supply of commercial space, rates of commercial vacancy and cost, which are leading indicators of regional economic activity. In addition to office space, commercial space includes R&D, industrial, and warehouse space. The change in the supply of commercial space, expressed as the absorption rate, reflects the amount of space rented, becoming available, and added through new construction. Gross absorption is a measure for total activity over a period while net absorption is the outcome. A negative change in the supply of commercial space shows a tightening in the commercial real estate market. The vacancy rate measures the amount of space that is unoccupied. Increases in vacancy, as well as declines in rents, reflect slowing demand relative to supply.

## HOW ARE WE DOING?

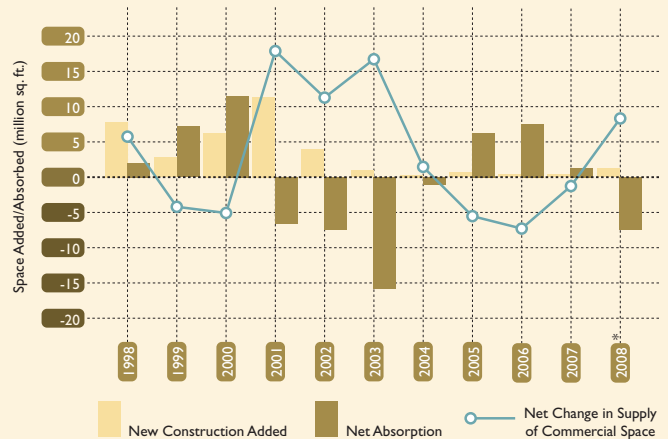
Silicon Valley's demand for commercial real estate slowed following the end of 2007 and dropped precipitously in the last quarter of 2008. As a result of falling demand and an addition of one million square feet of new commercial space, the net change in occupied space (absorption rate) entered negative territory for the first time in four years with a net loss of 7.6 million occupied square feet. After falling four years, vacancy rates increased across all commercial space categories, rising 8% overall. Climbing 105% from 2007, vacancies in Industrial Space increased by the largest margin of all commercial product categories. Compared to 2007, inflation-adjusted rents rose for Industrial (5%), Office (3%) and Warehouse (1%) Space but dropped 9% for R&D Space.

Reaching its peak in 2001 with 12.9 million square feet of space, the pace of commercial development drastically decreased over the years that followed. Office space has represented the lion's share of development throughout the past eight years and has recently been picking up following 2002. Development of R&D space dropped off after 2002 but accounted for over 90% of all new commercial space. Currently there are 922,000 square feet under construction and another 281,000 planned for development. There has been little development in industrial space since 2002; however, as of 2008 (Q1), 25,000 square feet is currently under development with another 40,000 planned. There has been no activity in warehouse development since 2002.

# PLACE

## Commercial Space

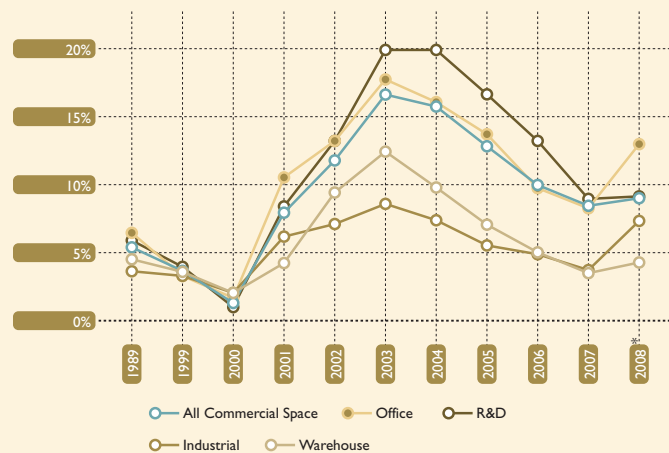
Change in Supply of Commercial Space  
Santa Clara County



\* As of November 2008  
Data Source: Colliers International  
Analysis: Collaborative Economics

## Commercial Vacancy

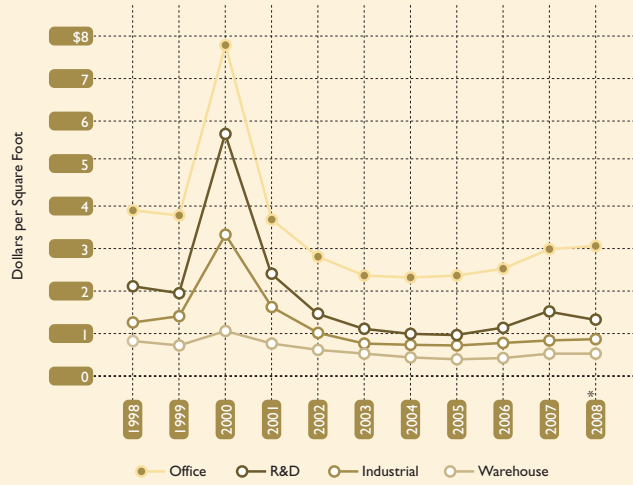
Annual Rate of Commercial Vacancy  
Santa Clara County



\* As of November 2008  
Data Source: Colliers International  
Analysis: Collaborative Economics

## Commercial Rents

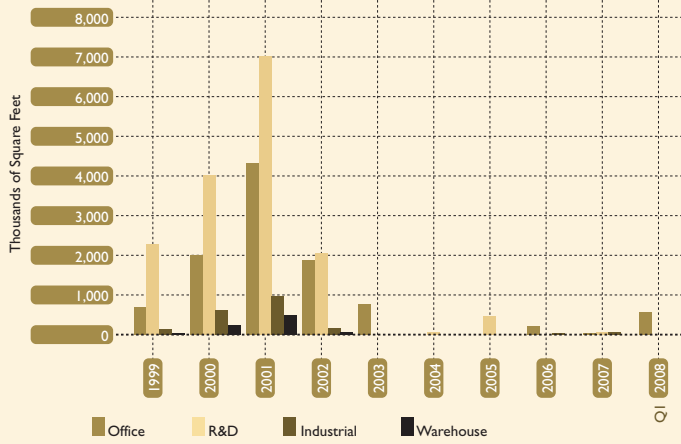
Annual Average Asking Rents  
Santa Clara County



\*As of November 2008  
Data Source: Colliers International  
Analysis: Collaborative Economics

## New Commercial Development

By Sector  
Silicon Valley



Data Source: Colliers International  
Analysis: Collaborative Economics

About the 2009 Index | 01  
Map of Silicon Valley | 02  
Table of Contents | 03  
2009 Index Highlights | 04 | 05  
Index at a Glance | 06 | 07

PEOPLE 08 | 11

ECONOMY 12 | 25

SOCIETY 26 | 37

Environment 38 - 41  
Transportation 42-43  
Land Use 44-45  
Housing 46-49

**Commercial Space**  
50-51

GOVERNANCE 52 | 55

Appendices 56 | 60  
Acknowledgments | 61

PLACE

# Civic Engagement

*At higher rates than the nation, Silicon Valley residents are engaging in the political process and our foreign-born are seeking U.S. citizenship.*

## WHY IS THIS IMPORTANT?

An engaged citizenry shares in the responsibility to advance the common good, is committed to place and has a level of trust in community institutions. Voter participation is an indicator of civic engagement and reflects community members' commitment to a democratic system, confidence in political institutions and optimism about the ability of individuals to affect public decision-making.

Throughout its history, the U.S. has attracted immigrants from around the world. Through naturalization, immigrants attain citizenship and full political participation in U.S. society. High rates of naturalization suggest a place is more open and accepting of people from diverse backgrounds. Also, higher levels of English proficiency and education correlate with higher naturalization rates among eligible immigrants.<sup>15</sup>

## HOW ARE WE DOING?

The November 4, 2008 Presidential Election marked record voter turnout across the country. Up 10% from the last general election in 2004, 83% of Silicon Valley's registered voters came to the polls; while statewide 79% of eligible voters casted ballots, 7% more than in 2004. Absentee voting continues to grow – more than half of Silicon Valley voters (55%) and 42% statewide cast absentee ballots. This represents a considerable increase for both from 34% in 2004.

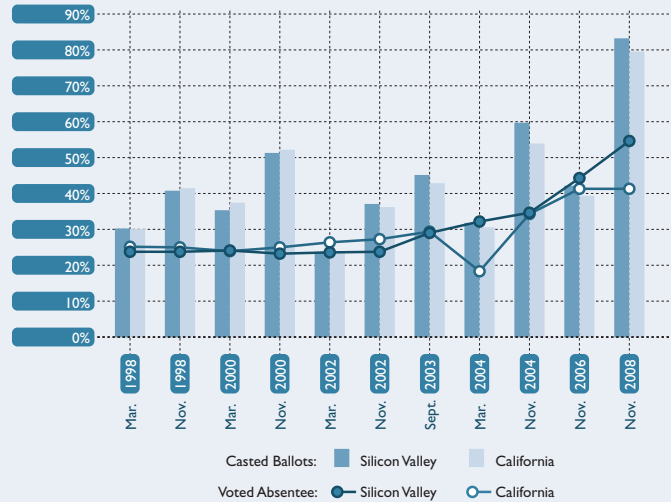
Since 2000, Silicon Valley voters have approved 81% of all local bond measures, including county, city and school district measures. Similar to statewide trends,<sup>16</sup> school districts are responsible for the vast majority of these bond measures. In Silicon Valley, schools accounted for 77%, and cities 20%, of all proposed bond measures. In 2008, voters approved all ten bonds proposed in the region

Per capita, foreign-born residents in Silicon Valley (San-Jose,-Sunnyvale-Santa Clara MSA) are three- times more likely to seek either permanent residency or citizenship than nationally. While immigrants obtaining naturalized citizenship declined 13% from 2006 to 2007, those seeking legal permanent residency increased 6%. By comparison, the U.S. the rate of naturalization declined by 7% and the rate of legal permanent residency declined by 17% over the same period.

# GOVERN

## Voter Participation

Percentage of Eligible Voters Who Casted Ballots and Absentee Ballots in General Elections  
Silicon Valley and California



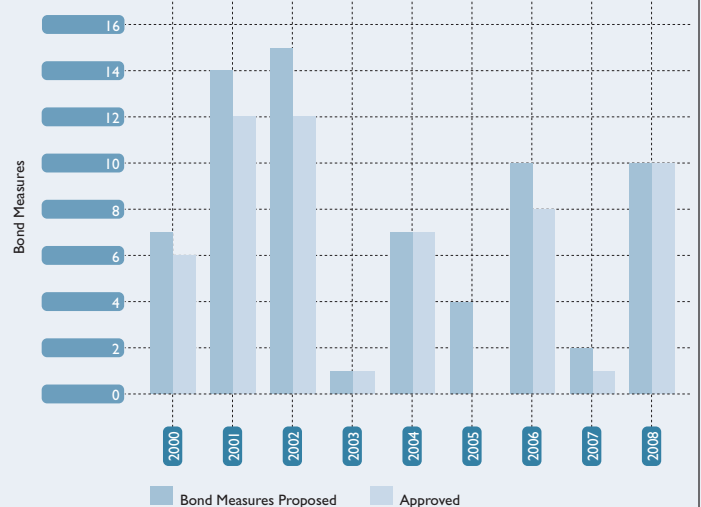
Data Source: California Secretary of State, Elections Division  
Analysis: Collaborative Economics

## Record Voter Turn-out 2004-2008

Silicon Valley **+10%**  
California **+7%**

## Local Bond Measures

On Ballot and Approved  
Santa Clara and San Mateo Counties



Data Source: California Secretary of State Elections Division, Santa Clara County Registrar of Voters, and San Mateo County board of Elections  
Analysis: Collaborative Economics

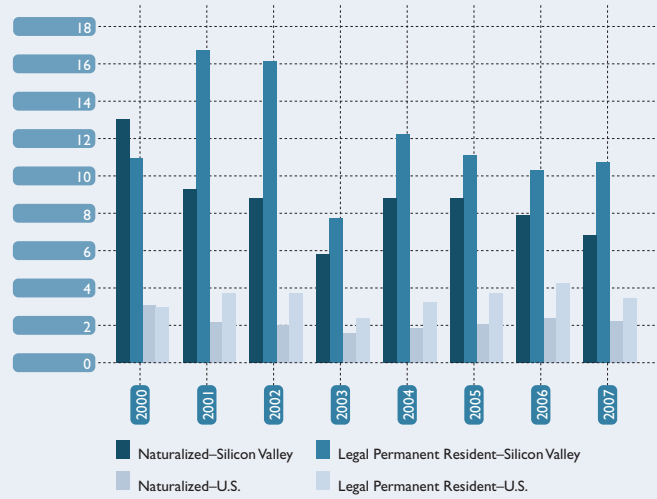
Since 2000, Silicon Valley voters have approved **81%** of all local bond measures

<sup>15</sup> M. Fix, J. Passel, K. Suher. 2003. "Trends in Naturalization," Brief No. 3 in Series "Immigrant Families and Workers: Facts and Perspectives" Urban Institute.

<sup>16</sup> According to the California Elections Data Archive, statewide, school districts are responsible for nearly 92% of bonds on ballots from 1995 to 2007.

## Immigrants Obtaining Legal Status

### Naturalized or Legal Permanent Resident



Data Source: U.S. Department of Homeland Security  
 Analysis: Collaborative Economics

Immigrants in Silicon Valley are **3 times** more likely to become citizens or permanent residents than in the U.S. as a whole

About the 2009 Index | 01  
 Map of Silicon Valley | 02  
 Table of Contents | 03  
 2009 Index Highlights | 04 | 05  
 Index at a Glance | 06 | 07

PEOPLE | 08 | 11

ECONOMY | 12 | 25

SOCIETY | 26 | 37

PLACE | 38 | 51

Civic Engagement | 52 – 53

Revenue | 54-55

GOV.

Appendices | 56 | 60  
 Acknowledgments | 61

# Revenue

*The region's local governments are facing mounting fiscal challenges.*

# GOVERN

## WHY IS THIS IMPORTANT?

Governance is defined as the process of decision-making and the process by which decisions are implemented. Many factors influence ability of local government to govern effectively, including the availability and management of resources. To maintain service levels and respond to a changing environment, local government revenue must be reliable. Economic fluctuations and state appropriation of locally generated revenue affect local revenues.

Property tax revenue is the most stable source of city government revenue, fluctuating much less over time than do other sources of revenue, such as sales, hotel occupancy and other taxes. Since property tax revenue represents less than a quarter of all revenue, other revenue streams are critical in determining the overall volatility of local government funding.

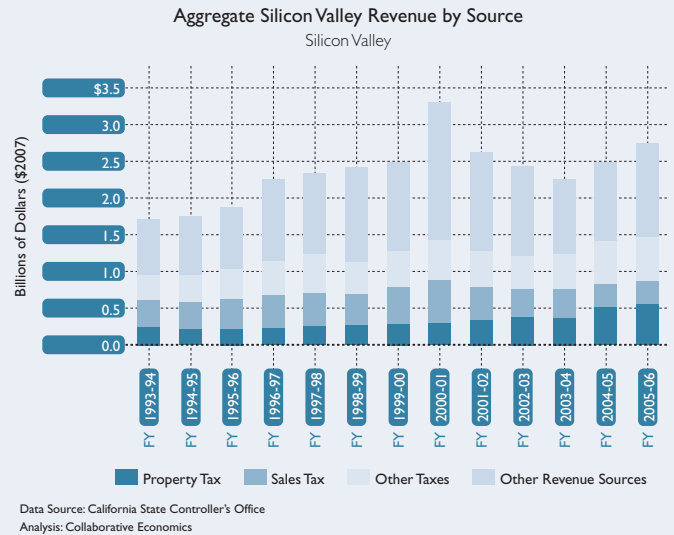
## HOW ARE WE DOING?

Between fiscal years 2004-05 and 2005-06, Silicon Valley's city revenue increased by 10%. Most of this growth is in Other Revenue which includes intergovernmental transfers, special benefit assessments, fines, as well as permits and investments. Relative to 1990, revenue from sales tax is 15% lower while revenue from property tax grew 100%, other tax by 85% and revenue from other sources increased 55% over 1990 levels. According to the California State Controller, the current housing market downturn will result in slowing growth in property tax revenue beginning in the 2007-08 fiscal year that will likely continue the next three years as property values are reassessed.<sup>17</sup>

Although total revenues have grown, the demand for public services has also grown. In fiscal year 2006-07, county expenditures rose three times faster than revenues relative to 1998, and total general county expenditures exceeded total general county revenues by \$229,494,158 for the two-county region.

A looming issue for cities and counties alike is meeting pension obligations that are growing at a far faster rate than revenues. For one city in Silicon Valley, for example, just since fiscal year 2003-04, expenses related to meeting pension obligations for current and future retirees have expanded 166% while total revenues have only increased 21%. In fiscal year 2003-04, 2.4% of total revenue was dedicated to expenses related to pensions. This more than doubled in the year that followed, and in fiscal year 2007-08, 5.2% of revenue was allocated to meeting pension obligations. These reported expenses do not include costs related to healthcare insurance for retirees.

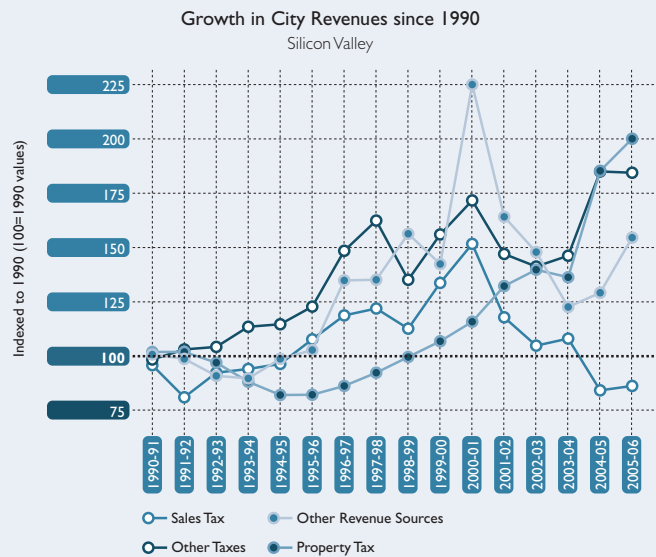
### City Revenue



### Change in revenues from previous year:

Property Taxes **+8%**  
Sales Taxes **+2%**

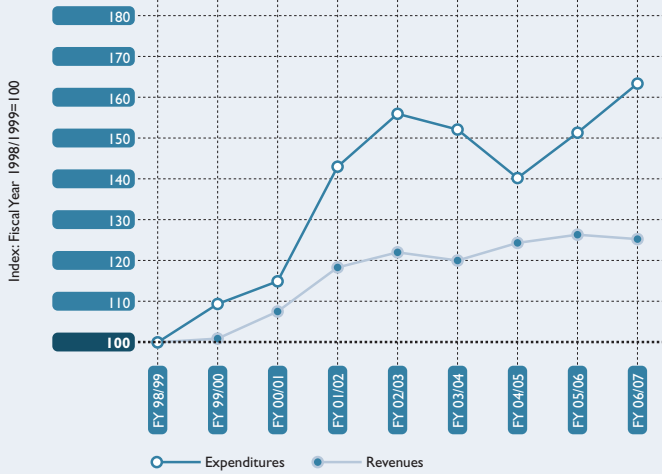
### City Revenue Trends



<sup>17</sup> A provision under Proposition 8 allows for a temporary reduction in assessed value of real property that experiences a decline in market value. "Assessed Valuation Annual Report - Fiscal Year Ending June 30, 2008." Office of the Controller, State of California.

## County Financials

Growth in Expenditures and Revenues  
Silicon Valley



Data Source: California State Controller's Office  
Analysis: Collaborative Economics

## County Financials

Fiscal Year 2006-2007

Revenue	<b>\$3,458,493,699</b>
Expenditures	<b>\$3,687,987,857</b>

About the 2009 Index | 01  
 Map of Silicon Valley | 02  
 Table of Contents | 03  
 2009 Index Highlights | 04 | 05  
 Index at a Glance | 06 | 07

PEOPLE 08 | 11

ECONOMY 12 | 25

SOCIETY 26 | 37

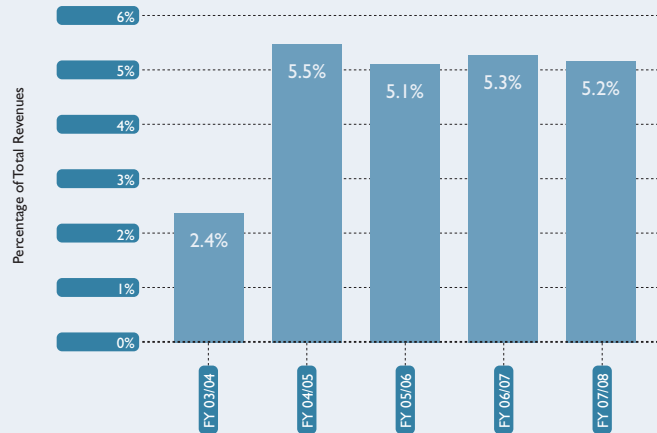
PLACE 38 | 51

## 2004-2008

Pension Expenses **+166%**  
 City Revenue **+21%**

## Pension Expenses as Percentage of Total Revenue

Citywide Revenues  
A Silicon Valley City



Data Source: City in Silicon Valley  
Analysis: Collaborative Economics

Civic Engagement  
52 – 53

Revenue  
54-55

GOV.

Appendices | 56 | 60  
 Acknowledgments | 61

## Front Page Statistics

### Area

Data are for Santa Clara and San Mateo Counties, Fremont, Newark, Union City, and Scotts Valley. Land Area data (except for Scotts Valley) is from the U.S. Census Bureau. State and County QuickFacts. Data is derived from Population Estimates, 2000 Census of Population and Housing, 1990 Census of Population and Housing, Small Area Income and Poverty Estimates, County Business Patterns, 1997 Economic Census, Minority- and Women-Owned Business, Building Permits, Consolidated Federal Funds Report, Census of Governments. Scotts Valley data is from the Scotts Valley Chamber of Commerce.

### Population

Data for the Silicon Valley population come from the E-1: City/County Population Estimates with Annual Percent Change report by the California Department of Finance and are for Silicon Valley cities. Population estimates are for 2008.

### Jobs

Jobs data for the front page statistic is based on Quarter 2 2008 employment estimates. Silicon Valley employment data are provided by the California Employment Development Department and are from Joint Venture: Silicon Valley Network's unique data set. The data set counts jobs in the region and uses data from the Quarterly Census of Wages and Employment program that produces a comprehensive tabulation of employment and wage information for workers covered by State unemployment insurance (UI) laws and Federal workers covered by the Unemployment Compensation for Federal Employees (UCFE) program. Employment data exclude members of the armed forces, the self-employed, proprietors, domestic workers, unpaid family workers, and railroad workers covered by the railroad unemployment insurance system. Covered workers may live outside of the Silicon Valley region. Multiple jobholders (i.e., individuals who hold more than one job) may be counted more than once. Data for Quarter 2 2008 are preliminary-revised. Data is for Santa Clara and San Mateo Counties, Scotts Valley, Fremont, Newark, and Union City.

### Average Annual Earnings

Figures were derived from the EDD/Joint Venture: Silicon Valley Network data set and are reported for Fiscal Year 2008 (Q3 & Q4 2007, Q1 & Q2 2008). Wages were adjusted for inflation and are reported in first half of 2008 dollars using the U.S. city average Consumer Price Index (CPI) of all urban consumers, published by the Bureau of Labor Statistics. Data for Quarter 2 2008 are preliminary-revised. Data is for Santa Clara and San Mateo Counties, Scotts Valley, Fremont, Newark, and Union City. Appendix B provides NAICS-based definitions for each of Silicon Valley's major areas of economic activity.

### Age Distribution, Adult Educational Attainment, and Foreign Born

Data for age distribution, adult educational attainment, and foreign born (front page statistics) are for Santa Clara and San Mateo Counties and are derived from the United States Census Bureau, 2007 American Community Survey. For education attainment, Some College includes Less than 1 year of college; Some college, 1 or more years, no degree; Associates degree; Professional certification.

### Foreign Immigration and Domestic Migration

Data come from the E-6: County Population Estimates and Components of Change by county – July 1, 2000-2008 report by the California Department of Finance and are for Santa Clara and San Mateo counties. Estimates are for 2008 and are provisional.

### Ethnic Composition

Data for ethnic composition (front page statistics) are for Santa Clara and San Mateo Counties and are derived from the United States Census Bureau, 2007 American Community Survey.

## People

### Population Change and Net Migration Flows

Statistics are from the E-6: County Population Estimates and Components of Change by county – July 1, 2000-2008 report by the California Department of Finance and are for Santa Clara and San Mateo Counties. Estimates for 2008 are provisional. Net migration includes all legal and unauthorized foreign immigrants, residents who left the State to live abroad, and the balance of hundreds of thousands of people moving to and from California from within the United States.

### Age Distribution

Data for age are for Santa Clara and San Mateo Counties and are derived from the United States Census Bureau, 2007 American Community Survey.

### Household Size

Statistics are from E-5: City/County Population and Housing Estimates - January 1, 2000 - 2008 report by the California Department of Finance. Data are based on Joint Venture's ZIP-Code-defined region of Silicon Valley.

### Educational Attainment

Data for educational attainment are for Santa Clara and San Mateo Counties and are derived from the United States Census Bureau, 2007 American Community Survey. For education attainment, some College includes: Less than 1 year of college; Some college, 1 or more years, no degree; Associates degree; Professional certification.

### Total Science & Engineering Degrees Conferred and Foreign Students

Regional, California and U.S. data are from the National Center for Education Statistics. Regional data for the Silicon Valley includes the following post secondary institutions: Menlo College, Cogswell Polytechnic College, University of San Francisco, University of California (Berkeley, Davis, Santa Cruz, San Francisco), Santa Clara University, San Jose State University, San Francisco State University, Stanford University, Golden Gate University. For comparison purposes, data for post secondary institutions was also collected for the San Diego region: Art Institute of California San Diego, California College San Diego, Coleman College, ITT Technical Institute San Diego, National University (La Jolla, CA), Point Loma Nazarene University, Remington College San Diego Campus, San Diego Christian College, San Diego State University, San Diego State University Imperial Valley Campus, University of California San Diego, University of Phoenix San Diego Campus, and University of San Diego. The academic disciplines include: computer and information sciences, engineering, engineering-related technologies, biological sciences/life sciences, mathematics, physical sciences and science technologies. Data were analyzed based on citizenship and level of degree (bachelors, masters or doctorate).

## Economy

### Employment

#### Monthly Jobs and Change in Total Nonfarm

Monthly jobs data are from the Bureau of Labor Statistics, Current Employment Statistics Survey (CES). Data is not seasonally adjusted, and includes total nonfarm in the region. Data is for the San Jose-Sunnyvale-Santa Clara MSA. December data is preliminary.

#### Quarterly Job Growth

Silicon Valley employment data are provided by the California Employment Development Department and are from Joint Venture: Silicon Valley Network's unique data set. The data set counts jobs in the region and uses data from the Quarterly Census of Wages and Employment program that produces a comprehensive tabulation of employment and wage information for workers covered by State unemployment insurance (UI) laws and Federal workers covered by the Unemployment Compensation for Federal Employees (UCFE) program. Employment data exclude members of the armed forces, the self-employed, proprietors, domestic workers, unpaid family workers, and railroad workers covered by the railroad unemployment insurance system. Covered workers may live outside of the Silicon Valley region. Multiple jobholders (i.e., individuals who hold more than one job) may be counted more than once. Data for Quarter 2 2008 are preliminary-revised. Data is for Santa Clara and San Mateo Counties, Scotts Valley, Fremont, Newark, and Union City.

#### Major Areas of Economic Activity

Silicon Valley employment data are provided by the California Employment Development Department and are from Joint Venture: Silicon Valley Network's unique data set. The data set counts jobs in the region and uses data from the Quarterly Census of Wages and Employment program that produces a comprehensive tabulation of employment and wage information for workers covered by State unemployment insurance (UI) laws and Federal workers covered by the Unemployment Compensation for Federal Employees (UCFE) program. Employment data exclude members of the armed forces, the self-employed, proprietors, domestic workers, unpaid family workers, and railroad workers covered by the railroad unemployment insurance system. Covered workers may live outside of the Silicon Valley region. Multiple jobholders (i.e., individuals who hold more than one job) may be counted more than once. All industries are included in the major areas of economic activity, Quarter 2 2008 are preliminary-revised. Data is for Santa Clara and San Mateo Counties, Scotts Valley, Fremont, Newark, and Union City.

#### Green Business Establishments & Jobs

The accounting of green business establishments and jobs is based on the methodology originally developed on behalf of Next 10 for the California Green Innovation Index. This database has been build through the use of multiple data sources for the identification and classification of green businesses (such as New Energy Finance, Cleantech GroupTM, LLC and others) and leveraged a sophisticated internet search process. The National Establishments Time-Series (NETS) database based on Dun & Bradstreet establishment data was sourced to extract business information such as jobs. The operational definition of green is based primarily on the definition of "cleantech" established by the Cleantech GroupTM, LLC. This sample offers a conservative estimate of the green industry in California.

### Income

#### Real per Capita Income

Total personal income and population data are from Moody's Economy.com. Income values are inflation-adjusted and reported in 2008 dollars, using the CPI for the U.S. City Average from the Bureau of Labor Statistics. Silicon Valley data includes Santa Clara and San Mateo Counties.

#### Income Distribution

Data for Distribution of Income are from the American Community Survey from the U.S. Census Bureau. Income ranges are in nominal values. Silicon Valley data includes Santa Clara and San Mateo Counties. Income is the sum of the amounts reported separately for the following eight types of income: wage or salary income; net self-employment income; interest, dividends, or net rental or royalty income from estates and trusts; Social Security or railroad retirement income; Supplemental Security Income; public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

#### Median Household Income

Data for Median Household Income are from the American Community Survey from the U.S. Census Bureau. All income values are adjusted into 2008 U.S. dollars, using CPI for the U.S. City Average from the Bureau of Labor Statistics. Silicon Valley data includes Santa Clara and San Mateo Counties. Income is the sum of the amounts reported separately for the following eight types of income: wage or salary income; net self-employment income; interest, dividends, or net rental or royalty income from estates and trusts; Social Security or railroad retirement income; Supplemental Security Income; public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

## Relative Cost of Living

The Regional Cost of Living index was provided by Moody's Economy.com. San Francisco data is based on the San Francisco-San Mateo-Redwood City, Metropolitan Division. San Jose data is based on San Jose-Santa Clara-Sunnyvale Metropolitan Statistical Area.

## Employer Contribution to Employee Pensions and Insurance Funds

Data are from the Bureau of Economic Analysis. Employer contributions to employee pensions and insurance funds are the following components of personal income: employer payments to private and government employee retirement plans, private group health and life insurance plans, privately administered workers' compensation plans, and supplemental unemployment benefit plans. Employment numbers are based on the wage and salary employment provided by the Bureau of Economic Analysis. In addition, compensation is the total average compensation of employees received divided by the total full-time and part-time wage and salary employment.

## Innovation

### Value Added per Employee

Value added per employee is calculated as regional Gross Domestic Product (GDP) divided by the total employment. GDP estimates the market value of all final goods and services. GDP and employment data are from Moody's Economy.com. Silicon Valley data is for Santa Clara and San Mateo Counties.

### Global Patent Collaboration and Silicon Valley Percentage of California & U.S. Patents

Patent data is provided by the U.S. Patent and Trademark Office and consists of utility patents granted by inventor. Geographic designation is given by the location of the first inventor named on the patent application. Silicon Valley patents include only those patents filed by residents of Silicon Valley cities. Data are based on Joint Venture's city defined region of Silicon Valley.

### Green Technology Patents

Data comes from 1790 Analytics, Patent Search by Technology (solar & wind energy generation, energy storage, fuel cells, hybrid systems) using data from the U.S. Patents & Trade Office. Data are based on Joint Venture's ZIP-Code-defined region of Silicon Valley.

### Establishments from Foreign Companies in Silicon Valley

Information on foreign firms with affiliates in Silicon Valley came from Uniworld Business Publications. The industry groups are based on the North American Industry Classification system (NAICS).

### Venture Capital

Data are provided by The MoneyTree™ Report from PricewaterhouseCoopers and the National Venture Capital Association based on data from Thomson Reuters. For the Index of Silicon Valley, only investments in firms located in Silicon Valley, based on Joint Venture's ZIP-code defined region, were included. Values are inflation-adjusted and reported in 2008 dollars, using the CPI for the U.S. City Average from the Bureau of Labor Statistics.

### Venture Capital Investment in Clean Technology & Cleantech Venture Capital Investment by Segment

Data provided by Cleantech Group™, LLC. For this analysis, venture capital is defined as disclosed clean tech investment deal totals. Data are based on Joint Venture's ZIP-code-defined region of Silicon Valley. The Cleantech Group describes cleantech as new technology and processes, spanning a range of industries that enhance efficiency, reduce or eliminate negative ecological impact, and improve the productive and responsible use of natural resources. See box for cleantech industry segments.

Data provided by Renaissance Capital's IPOhome.com and based on companies that filed and priced their Initial Price Offerings (IPOs). Company location is determined by corporate address on IPOhome.com. Data are based on Joint Venture's city defined region of Silicon Valley.

### IPO Pricings in Clean Technology

Data provided by Cleantech Group™, LLC. Data are based on Joint Venture's city defined region of Silicon Valley. The Cleantech Group describes cleantech as new technology and processes, spanning ranges of industries that enhance efficiency, reduce, or eliminate negative ecological impact, and improve the productive and responsible use of natural resources. Company location based on corporate address provided by Cleantech. Count based on IPO pricings each year.

### Mergers and Acquisitions

Data provided by FactSet Mergerstat LLC. Data are based on Joint Venture's ZIP-code-defined region of Silicon Valley. All merger and acquisition deals do not disclose value. Total values are based on all of the deals with values disclosed. All forms of mergers and acquisitions are included in count except for joint ventures.

### Mergers and Acquisitions in Clean Technology

Data provided by Cleantech Group™, LLC. Data are based on Joint Venture's city defined region of Silicon Valley. The Cleantech Group describes cleantech as new technology and processes, spanning ranges of industries that enhance efficiency, reduce, or eliminate negative ecological impact, and improve the productive and responsible use of natural resources. The following are the types of mergers and acquisitions included in the count: mergers, acquisitions, divestitures, and minority stake transactions.

### FDA Approved Therapeutics Developed by Silicon Valley Companies

Data is from MedTrack and was provided by BayBio. Silicon Valley data is based on Joint Venture's ZIP-Code-defined region of Silicon Valley.

### Broadband Penetration

Map is from California Broadband Taskforce's The State of Connectivity Report published in January 2008. In the report, Silicon Valley is part of a larger regional definition of the San Francisco Bay Area, but the map shows a close up view of the Silicon Valley.

## Society

### Preparing for Economic Success

#### High School Graduation Rates and Meeting UC/CSU Entrance Requirements

Department of Education. This is the first year statistics have been derived from student level records. California Legislature enacted SB1453, which establishes two key components necessary for a long-term assessment and accountability system:

- Assignment of a unique, student identifier to each K-12 pupil enrolled in a public school program or in a charter school that will remain with the student throughout his or her academic 'career' in the California public school system; and
- Establishment of a longitudinal database of disaggregated student information that will enable state policy-makers to determine the success of its program of educational reform.

Historical data are final and are from the California Department of Education. The methodology used calculates an approximate probability that one will graduate on time by looking at the number of 12th grade graduates and number of 12th, 11th, 10th and 9th grade dropouts over a four year period.

#### High School Dropout rates

Data for the 2006/2007 academic year are provided by the California Department of Education. This is the first year statistics have been derived from student level records. California Legislature enacted SB1453, which establishes two key components necessary for a long-term assessment and accountability system:

- Assignment of a unique, student identifier to each K-12 pupil enrolled in a public school program or in a charter school that will remain with the student throughout his or her academic 'career' in the California public school system; and
- Establishment of a longitudinal database of disaggregated student information that will enable state policy-makers to determine the success of its program of educational reform.

Historical data are final and are from the California Department of Education. The methodology uses a 4-year derived dropout rate that is an estimate of the percent of students who would drop out in a four year period based on data collected for a single year. Beginning in 2002-03, the California Department of Education adopted the National Center for Educational Statistics (NCEES) Dropout definition. Following the new guidelines, the California Department of Education now defines a dropout as a person who: 1) Was enrolled in grades 7, 8, 9, 10, 11 or 12 at some time during the previous school year AND left school prior to completing the school year AND has not returned to school as of Information Day, OR 2) Did not begin attending the next grade (7, 8, 9, 10, 11 or 12) in the school to which they were assigned or in which they had pre-registered or were expected to attend by Information Day.

#### Share of Students who have taken Algebra II

Data are from the California Department of Education, California Standards Tests (CST) Research Files for San Mateo and Santa Counties. In 2003, the California Standards Tests (CST) replaced the Stanford Achievement Test, ninth edition (SAT/9). The CSTs in English-language arts, mathematics, science, and history-social science are administered only to students in California public schools. Except for a writing component that is administered as part of the grade four and grade seven English-language arts tests, all questions are multiple-choice. These tests were developed specifically to assess students' knowledge of the California content standards. The State Board of Education adopted these standards, which specify what all children in California are expected to know and be able to do in each grade or course. The 2008 Algebra II CSTs were required for students who were enrolled in the grade/course at the time of testing or who had completed a course during the 2007-08 school year, including 2007 summer school. The following types of scores are reported by grade level and content area for each school, district, county, and the state: % Advanced, % Proficient, % Basic, % Below Basic and % Far Below Basic is the percentage of students in the group whose scores were at this performance standard. The state target is for every student to score at the Proficient or Advanced Performance Standard.

## Early Education

### Preschool Enrollment

Data for preschool enrollment are for Santa Clara and San Mateo Counties and are derived from the United States Census Bureau, 2007 American Community Survey.

### Kindergarten Readiness and Teacher Expectations

## Cleantech Industry Segments

### Energy Generation

Wind  
Solar  
Hydro/Marine  
Biofuels  
Geothermal  
Other

### Energy Storage

Fuel Cells  
Advanced Batteries  
Hybrid Systems

### Energy Infrastructure

Management  
Transmission

### Energy Efficiency

Lighting  
Buildings  
Glass  
Other

### Transportation

Vehicles  
Logistics  
Structures  
Fuels

### Water & Wastewater

Water Treatment  
Water Conservation  
Wastewater Treatment

### Air & Environment

Cleanup/Safety  
Emissions Control  
Monitoring/Compliance  
Trading & Offsets

### Materials

Nano  
Bio  
Chemical  
Other

### Manufacturing/Industrial

Advanced Packaging  
Monitoring & Control  
Smart Production

### Agriculture

Natural Pesticides  
Land Management  
Aquaculture

### Recycling & Waste

Recycling  
Waste Treatment

Source: Cleantech Group™, LLC

## APPENDIX A

The results are based on a study conducted by Applied Survey Research and commission by Santa Clara Partnership for School Readiness and the Silicon Valley Community Foundation. In 2008, the study focused on both Santa Clara County and San Mateo County, and looks at kindergarten readiness and teacher expectation data. The Kindergarten readiness data is obtained via the Kindergarten Observation Form. Kindergarten readiness scores are based on a 1-4 scale (1 = not yet, 2 = beginning, 3 = in progress, 4 = proficient). Don't know / Not observed responses are not included. Means in Santa Clara County are based on the following sample sizes: 682 for 2004 data, 768-796 for 2005 data, 713 for 2006 data, and 710-718 for 2008 data (weighted n's). 2004-2006 data are weighted for EL status; 2008 data are weighted for ethnicity. Means in San Mateo County are based on the following sample sizes: 669-670 for 2005 data and 646-654 for 2008 data (weighted n's). 2005 and 2008 data are weighted for EL status. The teacher expectation data is based upon a Kindergarten Observation Form I and Teacher Survey on Importance of Readiness Skills. In Santa Clara County, means are based on sample sizes that range from 697-699 for 2004 data, 768-796 for 2005 data, and 713 for 2006 data, and 710-718 for 2008 data (weighted n's). 2004-2006 data are weighted for EL status; 2008 data are weighted for ethnicity. In San Mateo County, means are based on sample sizes that range from 669-670 for 2005 data, and 646-654 for 2008 data (weighted n's). 2005 and 2008 data are weighted for EL status.

### Third Grade Reading Ability and Reading Proficiency by Race/Ethnicity

Data are from the California Department of Education, CAT/6 Research Files for San Mateo and Santa Clara Counties. In 2003, the California Achievement Test CAT/6 replaced the Stanford Achievement Test, ninth edition (SAT/9), as the national norm-referenced test for California public schools. CAT/6 is a norm-referenced test; student's scores are compared to national norms and do not reflect absolute achievement. This indicator tracks third grade reading scores on the California Achievement Test, sixth edition (CAT/6), which measures performance relative to a national distribution.

## Arts & Culture

### Contributions to the Arts

Reported contributions to art/culture organizations come from "1st ACT Value Proposition: The Opportunity of a Creative Culture" by McKinsey & Company and 1st ACT Silicon Valley (December 2006). Silicon Valley includes the San Jose-Sunnyvale-Santa Clara Metropolitan Statistical Area (MSA) and San Mateo County.

## Quality of Health

### Child Immunizations

The Santa Clara County Public Health Department's annual Kindergarten Retrospective Survey (KRS) is a primary source of information about childhood immunization coverage in California. This survey provides estimates of immunization coverage among kindergarten students at various age checkpoints. This survey is conducted every two years. The 2008 sample consists of 2,574 kindergarten students (3% of kindergarteners in the state). Children in this sample were born between 2001 and 2003. Since this is a retrospective survey, estimates of immunization coverage represent levels among toddlers approximately 3-4 years ago. 4:3:1 refers to four or more doses of DTPa, three or more doses of Polio, and one or more doses of MMR. California data is from the California Department of Health Services.

### Overweight Youth and Adults

Data on adult and adolescent obesity are based on results from the California Health Information Survey, UCLA Center for Health Policy Research. For adults, "Overweight or Obese" include the respondents who have a Body Mass Index (BMI) of 25 or greater. For Adolescents, "Overweight or Obese" includes the respondents who have a BMI in the highest 95 percentile with respect to their age and gender. Data are for Santa Clara and San Mateo Counties.

### Share of Youth in Health Fitness Zone by Age

The indicator measures the share of students who met the criterion-referenced standard for the body composition component of the California Fitness Test. Data is for Santa Clara and San Mateo Counties. The California Department of Education administers the Physical Fitness Test in grades five, seven, and nine in California public schools. The test used for physical fitness testing is the FITNESSGRAM®, designed for this purpose by the State Board of Education.

### Share of Population ever Diagnosed with Diabetes

Data of population ever diagnosed with diabetes are based on results from the California Health Information Survey, UCLA Center for Health Policy Research.

### Access to Health Insurance

All data on insurance coverage are drawn from the California Health Interview Survey, carried out by the UCLA Center for Health Policy Research. For health insurance coverage, the indicator measures the share of people who answered "yes" when asked by the interviewer whether or not they are covered by health insurance. Data are for Santa Clara and San Mateo Counties. The indicator gives no indication of the quality or comprehensiveness of insurance coverage.

### Preventable Hospitalizations

Data is provided by the Office of Statewide Health Planning and Development Healthcare Information Resource Center (OSHPC). Data prior to 2003 was based on a different software program and is not comparable to the 2003 and more recent data. Three prevention quality indicators were established based on hospital discharges for the following conditions: chronic obstructive pulmonary disease, congestive heart failure, hypertension. Data is presented for Silicon Valley (combined numbers for San Mateo and Santa Clara Counties) and California from 2003-most recent year. Data was supplied with observed numerator based upon hospital discharges, denominator based on population as defined by U.S. Census. A rate was calculated per 100,000 people.

### Teen Birth Rate

Data is from the California Department of Public Health, Vital Statistics Query System. Data is defined as rate of live births per 1,000 female population aged 15 to 19 across all ethnicities. Other variables include: Years (1994-2006), and geography (Santa Clara County, San Mateo County and California).

## Safety

### Child Abuse

Child maltreatment data are from the California Children's Services Archive, CWS/CMS 2007 Quarter 4 Extract. Data are downloaded from the Center for Social Services Research at the University of California at Berkeley. Population data comes from the California Department of Finance. The statewide Referral Rate for a given year is computed by dividing the unduplicated state count of children with an abuse or neglect allegation by the state child population and then multiplying by 1,000 (for a referral rate per 1,000 children in the population). Similarly, each county's referral rate for a given year is calculated by dividing the unduplicated county count of children with an abuse or neglect allegation by the county child population and then multiplying by 1,000. The Substantiation Rate (both state and county) for a given year is computed by dividing the unduplicated count of children with a substantiated allegation by the child population and multiplying by 1,000. Children with missing county assignment are included in the statewide calculation. Given the methods outlined above, county values may not sum to statewide total. Data are for Santa Clara and San Mateo Counties.

### Adult & Juvenile Felony Offenses/Drug & Alcohol Rehabilitation Services

Crime data are from the FBI's Uniform Crime Reports, as reported by the California Department of Justice in their annual "Criminal Justice Profiles" (<http://caag.state.ca.us/cjcs/pubs.html>). Felony offenses include violent, property and drug offenses. Drug rehabilitation data include the number of clients utilizing residential and outpatient drug and alcohol rehabilitation services provided by Santa Clara and San Mateo counties. Data are an unduplicated count of residents served.

### School Safety

Suspension data was obtained from the California's Department of Education, Dataquest site. The school year 2004-2005 represents the first school year for which this suspension data is available. Numbers reflect suspensions across all grades (K-12) and are presented as a percentage of enrollment. Data was collected for Santa Clara County, and San Mateo County and California.

## Place

### Environment

#### Protected Open Space

Data are from GreenInfo Network's Bay Area Protected Lands Database, and are for Santa Clara and San Mateo Counties, Scotts Valley, Fremont, Newark, and Union City. Data include lands owned by public agencies and non-profit organizations that are protected primarily for open space uses and that are accessible to the general public without any special permission. Previously, parks less than 10 acres were excluded from the dataset, but in the 2006 update, there was no acreage cut-off. The database was updated in 2007; slight discrepancies in the data come from areas of SF Watershed lands were corrected to not include areas where 280 passed through. Corrections were also made to Don Edwards Wildlife Area.

#### Renewable Energy

Data is from the California Solar Initiative, December 17, 2008 extract. Data covers approved rebates, and rebates that were cancelled or withdrawn are not included.

#### Water Resources

Data for this indicator were provided by the Bay Area Water Supply and Conservation Agency (BAWSCA). Data is compiled annually among BAWSCA agencies to update key information and assist in projecting suburban demand and population. Gross per capita consumption includes residential, non-residential, recycled and unaccounted for water use among the Santa Clara and San Mateo County BAWSCA agencies.

#### South Bay Water Quality

Data for Mercury concentration in fish are from the San Francisco Estuary Institute, Containment Concentrations in Sport Fish from San Francisco Bay, 2006. Data is for white sturgeon. Annual loads of mercury from the Guadalupe River are from the San Francisco Estuary Institute, The Pulse of the Estuary, 2008.

#### Trends in Waste Diversion

Data is from the California Integrated Waste Management Board. San Mateo and Santa Clara jurisdictional data for waste diversion rates and tons of waste disposed were used to calculate Silicon Valley waste diversion rates.

## Transportation

### Means of Commute

Data on the means of commute to work are from the United States Census Bureau, American Community Survey. Data are for workers 16 years old and over residing in Santa Clara and San Mateo Counties commuting to the geographic location at which workers carried out their occupational activities during the reference week whether or not the location was inside or outside the county limits. The data on employment status and journey to work

relate to the reference week; that is, the calendar week preceding the date on which the respondents completed their questionnaires or were interviewed. This week is not the same for all respondents since the interviewing was conducted over a 12-month period. The occurrence of holidays during the relative reference week could affect the data on actual hours worked during the reference week, but probably had no effect on overall measurement of employment status. People who used different means of transportation on different days of the week were asked to specify the one they used most often, that is, the greatest number of days. People who used more than one means of transportation to get to work each day were asked to report the one used for the longest distance during the work trip. The category, "Car, truck, or van," includes workers using a car (including company cars but excluding taxicabs), a truck of one-ton capacity or less, or a van. The category, "Public transportation," includes workers who used a bus or trolley bus, streetcar or trolley car, subway or elevated, railroad, or ferryboat, even if each mode is not shown separately in the tabulation. The category "Other Means" includes taxicab, motorcycle, bicycle and other means that are not identified separately within the data distribution.

### Alternative Fuel Vehicles Registered

Alternative fuel vehicle data are provided by R.L. Polk & Co. Data is for Santa Clara and San Mateo Counties, Scotts Valley, Fremont, Newark, and Union City. Data includes newly registered vehicles for new and used vehicles.

### Vehicle Miles of Travel per Capita & Gas Prices

Vehicle Miles Traveled (VMT) is defined as total distance traveled by all vehicles during selected time period in geographic segment. VMT estimates are from the California Department of Transportation's "2007 California Motor Vehicle Stock, Travel, and Fuel Forecast." Data includes annual total VMT on State highways and non-state highways. In order to calculate VMT, Caltrans multiplies the road section length (length in miles along the centerline of the roadway) by Average Annual Daily Traffic (AADT). AADT are actual traffic counts that the city, county, or state have taken and reported to the California Department of Transportation. To compute per-capita values, Revised County Population Estimates, 1970-2007, December 2007 from the California Department of Finance were used. Gas prices are average annual retail gas prices for California, and come from the Weekly Retail Gasoline and Diesel Prices (Cents per Gallon, Including Taxes) dataserries reported by the U.S. Department of Energy, Energy Information Administration. Gas prices are All Grades All Formulations Retail Gasoline Prices (including taxes) and have been adjusted into first half of 2008 dollars using the U.S. city average Consumer Price Index (CPI) of all urban consumers, published by the Bureau of Labor Statistics.

### Fuel Consumption

Fuel consumption data are from the Caltrans, 2007 "California Motor Vehicle Stock, Travel, and Fuel Forecast" and include estimates for diesel and gasoline. Figures for 2007 are projections. Silicon Valley data is for Santa Clara and San Mateo Counties. To compute per-capita values, Revised County Population Estimates, 1970-2007, December 2007 from the California Department of Finance were used.

### Transit Use

Data are the sum of annual ridership on the light rail and bus systems in Santa Clara and San Mateo counties and rides on Caltrain. Data are provided by Sam Trans, Valley Transportation Authority, Altamont Commuter Express and Caltrain. To compute per-capita values, Revised County Population Estimates, 1970-2007, December 2007 from the California Department of Finance were used.

## Land Use

### Residential Density

Joint Venture: Silicon Valley Network conducted a land-use survey of all cities within Silicon Valley. Collaborative Economics completed survey compilation and analysis. Until this year, participating cities included: Atherton, Belmont, Cupertino, Foster City, Fremont, Gilroy, Hillsborough, Los Altos Hills, Los Gatos, Monte Sereno, Morgan Hill, Mountain View, Newark, Palo Alto, Redwood City, San Carlos, San Jose, San Mateo, Santa Clara, Saratoga, Sunnyvale, and Union City. Santa Clara and San Mateo Counties are also included. This year, the survey was expanded to include more cities along the 101 corridor: Brisbane, Burlingame, Millbrae, San Bruno, and South San Francisco. Most recent data are for fiscal year 2008 (July '07-June '08). The average units per acre of newly approved residential development are reported directly for each of the cities and counties participating in the survey.

### Housing and Development Near Transit

Data are from Joint Venture: Silicon Valley Network Survey of Cities. The number of new housing units and the square feet of commercial development within one-quarter mile of transit are reported directly for each of the cities and counties participating in the survey. Places within one-quarter mile of transit are considered "walkable" (i.e. within a 5- to 10-minute walk, for the average person).

### Adoption of Green Building Policies

Data are from Joint Venture: Silicon Valley Network Survey of Cities. In recent years, cities have adopted green building codes, and in July of this year California approved statewide codes. In order to begin tracking achievements in this area, this year's survey included questions related to green building codes.

## Housing

### Building Affordable Housing

Data are from the Joint Venture: Silicon Valley Network of Survey Cities. Affordable units are those units that are affordable for a four-person family earning up to 80% of the median income for a county. Cities use the U.S. Department of Housing and Urban Development's (HUD) estimates of median income to calculate the number of units affordable to low-income households in their jurisdiction.

### Rental Affordability

Data on average rental rates are from RealFacts survey of all apartment complexes in Santa Clara and San Mateo Counties of 40 or more units. Rates are the prices charged to new residents when apartments turn over and have been adjusted into 2008 dollars using the U.S. city average Consumer Price Index (CPI) of all urban consumers, published by the Bureau of Labor Statistics.

### Home Affordability

Data are from the California Association of Realtors' (CAR) Housing Affordability Index. CAR stopped producing the Housing Affordability Index for all homebuyers since the end of 2005 and now produces a Housing Affordability Index for first-time buyers that have been updated historically to 2003. The data for Silicon Valley includes Santa Clara and San Mateo County, and based on the median price of existing single-family homes sold from CAR's monthly existing home sales survey, the national average effective mortgage interest rate as reported by the Federal Housing Finance Board, and the median household income as reported by Caritas/NPDC. Quarterly Sales Volume for Existing Single Family Detached Home Sales data were provided by DataQuick Information Systems.

### Residential Foreclosure Activity

Silicon Valley foreclosure data is for all home types and comes from DataQuick Information Systems. Data are based on Joint Venture's ZIP-code-defined region of Silicon Valley.

### Trends in Homelessness

Data are provided from the 2005 and 2007 Santa Clara County Homeless Census and Survey by Applied Survey Research. Surveys followed the U.S. Department of Housing and Urban Development, Office of Community Planning and Development's Guide to Counting Unsheltered Homeless People.

## Commercial Space

### Commercial Space, Vacancy, Rents, and Development

Data are from Colliers International. Commercial space includes office, R&D, industrial and warehouse space. The vacancy rate is the amount of unoccupied space and is calculated by dividing the sum of the direct vacant and sublease vacant space by the building base. The vacancy rate does not include occupied space that is presently being offered on the market for sale or lease. Net absorption is the change in occupied space during a given time period. Data for commercial space, vacancy, and rents cover Santa Clara County. Commercial Development data are for San Mateo and Santa Clara Counties. Average asking rents have been adjusted into 2008 dollars using the annual average Consumer Price Index (CPI) of all urban consumers in the San Francisco-Oakland-San Jose region, published by the Bureau of Labor Statistics.

## Governance

### Civic Engagement

#### Voter Participation

Data are from the California Secretary of State, Elections and Voter Information Division and the California State Archives Division. The eligible population is determined by the Secretary of State using Census population data provided by the California Department of Finance. Data are for Santa Clara and San Mateo counties.

#### Support for Local Bonds

Data for the most current ballot bond initiatives are obtained from the Santa Clara County Registrar of Voters and San Mateo County Board of Elections. Past local bond voting results are obtained from the California Elections Data Archive (CEDA) - a joint project of the Center for California Studies and Institute for Social Research of California State University, Sacramento, and the Secretary of State. Following each local election, CEDA collects and compiles results from city, county, school district, and local ballot measure elections. The reports are completed in July of each year and include local election results from the previous calendar year. Data is presented for years 2000 to 2008.

#### Immigrants Applying for Citizenship

Data provided by the U.S. Department of Homeland Security for San Jose-Sunnyvale-Santa Clara Metropolitan Statistical Area (MSA) and the U.S. Data for population in the San Jose MSA and the U.S. are provided by the U.S. Census Bureau. A rate of citizenship for naturalization and legal permanent resident was calculated by dividing numbers of immigrants applying by population (1,000).

## Revenue

### City Revenue

Data for city revenue are from the State of California Cities Annual Report. Data include all cities and towns and dependent special districts and do not include redevelopment agencies and independent special districts. Data include all revenue sources to cities except for utility-based services (which are self-supporting from fees and the sales of bonds), voter-approved indebtedness property tax and sales of bonds and notes. The "other taxes" and "other revenue" include revenue sources such as transportation taxes, transient lodging taxes, business license fees, other non-property taxes and intergovernmental transfers. Data are for Silicon Valley cities.

### County Financials

Data for county financials are from the State of California Counties Annual Report. Data include San Mateo and Santa Clara Counties. Data includes all revenue sources to cities and expenditures. The "other taxes" and "other revenue" include revenue sources such as transportation taxes, transient lodging taxes, business license fees, other non-property taxes, and intergovernmental transfers. Data have been adjusted for inflation and are reported in first half of 2008 dollars using the U.S. city average Consumer Price Index (CPI) of all urban consumers, published by the Bureau of Labor Statistics.

### Changing Share of City/County Budget for Pensions

Data provided by an undisclosed city in Silicon Valley. In the fiscal year ending 2005, the City increased its pension benefit to the non-public safety employees from 2.0% at age 55 to 2.7% at age 55. Expenses related to pension obligations represented here do not include expenses for healthcare coverage. The Citywide Revenues include all revenues collected by the city and include those revenues collected by the city's utility funds.

Silicon Valley Major Areas of Economic Activity 2007

	Employment	% of Total Silicon Valley Employment	Employment Concentration (relative to U.S.)
<b>Information Products &amp; Services</b>	<b>285,614</b>	<b>20.5%</b>	<b>4.8</b>
Software	86,910	6.2%	5.7
Computer Hardware	39,321	2.8%	20.5
Semiconductor & Semiconductor Equipment Manufacturing	38,926	2.8%	16.1
Electronic Component Manufacturing	29,082	2.1%	5.7
I.T.Wholesale Trade	22,431	1.6%	3.8
Internet & Information Services	22,116	1.6%	4.8
Instrument Manufacturing	21,691	1.6%	5.1
Communications Services & Equipment Manufacturing	19,316	1.4%	1.6
Other Media/Broadcasting	3,904	0.3%	0.6
I.T.Repair Services	1,918	0.1%	2.1
<b>Life Sciences</b>	<b>33,311</b>	<b>2.4%</b>	<b>2.8</b>
Medical Devices	13,093	0.9%	2.2
Pharmaceuticals	10,587	0.8%	4.1
Biotechnology	9,631	0.7%	2.9
<b>Innovation &amp; Specialized Services</b>	<b>152,218</b>	<b>10.9%</b>	<b>1.1</b>
Technical & R&D	50,009	3.6%	2.4
Personnel	32,412	2.3%	0.9
Management Services & Offices	24,655	1.8%	0.9
Specialized Financial Services	22,273	1.6%	0.9
Legal	11,327	0.8%	0.9
Marketing/Ad/PR	6,568	0.5%	0.9
Design	4,974	0.4%	1.2
<b>Business Infrastructure</b>	<b>64,187</b>	<b>4.6%</b>	<b>1.0</b>
Facilities	39,903	2.9%	1.2
Administrative Services	24,284	1.7%	0.8
<b>Community Infrastructure</b>	<b>790,534</b>	<b>56.8%</b>	<b>0.8</b>
Retail	139,422	10.0%	0.9
Health & Social Services	122,207	8.8%	0.7
Accommodation & Food Services	105,749	7.6%	0.9
Education	96,032	6.9%	0.8
Construction	76,582	5.5%	0.9
Consumer Services	43,495	3.1%	0.9
Wholesale Trade	38,017	2.7%	0.7
Transportation	27,878	2.0%	1.7
Federal Government Administration	25,732	1.8%	1.9
Arts, Entertainment, & Recreation	24,939	1.8%	1.0
Consumer Financial Services	24,273	1.7%	0.6
Goods Movement	23,630	1.7%	0.7
Local Government Administration	11,967	0.9%	0.3
Nonprofits	11,727	0.8%	0.9
Other (Private Households & Unclassified Industries)	11,425	0.8%	1.4
Utilities	5,169	0.4%	0.7
Warehousing & Storage	2,213	0.2%	0.3
State Government Administration	80	0.0%	0.0
<b>Other Manufacturing</b>	<b>66,381</b>	<b>4.8%</b>	<b>0.5</b>
Other Primary & Fabricated Metal Manufacturing	16,767	1.2%	0.8
Diversified Ag & Food Manufacturing	15,289	1.1%	0.5
Other Misc. Manuf. & Space & Defense Manufacturing	11,700	0.8%	1.4
Other Machinery & Equipment Manufacturing	11,113	0.8%	0.4
Other Petrochemical Manufacturing	5,198	0.4%	0.3
Textile, Wood, & Furniture Manufacturing	4,078	0.3%	0.2
Paper & Packaging Manufacturing	1,912	0.1%	0.4
Mining	325	0.0%	0.0

Cells highlighted in green indicate that industry is more concentrated in Silicon Valley than the U.S.

Data Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages  
 Analysis: Collaborative Economics

**NEW LEAF PAPER®**  
 ENVIRONMENTAL  
 BENEFITS STATEMENT  
*of using post-consumer waste  
 fiber vs. virgin fiber*

Joint Venture saved the following resources by using New Leaf Primavera S16, made with 80% recycled fiber and 20% post-consumer waste, elemental chlorine free and manufactured with electricity that is offset with Green-e® certified renewable energy certificates.

34	Trees
15,451	Gallons of Water
22	Million Btu of Energy
1,661	Pounds of Solid Waste
3,688	Pounds of Greenhouse Gases

Calculations based on research by Environmental Defense Fund and other members of the Paper Task Force.

[www.newleafpaper.com](http://www.newleafpaper.com)

**NEW LEAF PAPER**  
Environmental Solutions

## ACKNOWLEDGMENTS

Special thanks to the following organizations that contributed data and expertise:

IstACT  
I790 Analytics  
Altamont Commuter Express  
Applied Survey Research  
Bay Area Water Supply and Conservation Agency  
BayBio  
California Association of Realtors  
California Broadband Taskforce Initiative  
California Department of Education  
California Department of Finance  
California Department of Health Care Services  
California Department of Justice  
California Department of Public Health  
California Department of Social Services  
California Department of Transportation  
California Employment Development Department  
California Integrated Waste Management Board  
California Office of Statewide Health Planning and Development  
California Public Utilities Commission  
California Secretary of State  
California State Controller's Office  
Caltrain  
Center for Social Services Research,  
School of Social Welfare, University of California, Berkeley  
Center for the Continuing Study of the California Economy  
City Planning and Housing Departments of Silicon Valley  
Cleantech Group™, LLC  
Colliers International  
DataQuick Information Systems  
FactSet Mergerstat, LLC  
Federal Bureau of Investigation  
GreenInfo Network  
McKinsey & Company  
MedTRACK  
Moody's Economy.com  
National Center for Education Statistics  
National Center for Charitable Statistics  
Next 10  
NOVA Workforce Investment Board  
PricewaterhouseCoopers/  
National Venture Capital Association MoneyTree™ Report,  
Data: Thomson Reuters  
Peninsula Community Foundation  
Public Policy Institute of California  
R.L. Polk & Co.  
RealFacts  
Renaissance Capital  
SamTrans  
San Francisco Estuary Institute  
San Mateo County  
San Mateo County Board of Elections  
San Mateo County Human Services Agency, Planning & Evaluation  
Santa Clara County  
Santa Clara County Department of Alcohol & Drug Services,  
Alcohol & Drug Services Research Institute  
Santa Clara County Partnership for School Readiness  
Santa Clara County Public Health Department  
Santa Clara County Registrar of Voters  
Silicon Valley City Managers  
Silicon Valley Community Foundation  
U.S. Bureau of Labor Statistics  
U.S. Census Bureau  
U.S. Department of Commerce  
U.S. Department of Energy  
U.S. Department of Homeland Security  
U.S. Patent and Trademark Office  
UCLA Center for Health Policy Research  
United Way Silicon Valley  
Uniworld Business Publications  
Valley Transportation Authority  
Walls & Associates

## JOINT VENTURE: SILICON VALLEY NETWORK

Established in 1993, Joint Venture: Silicon Valley Network provides analysis and action on issues affecting our region's economy and quality of life. The organization brings together established and emerging leaders—from business, government, academia, labor and the broader community—to spotlight issues, launch projects, and work toward innovative solutions.

## SILICON VALLEY COMMUNITY FOUNDATION

Serving all of San Mateo and Santa Clara Counties, Silicon Valley Community Foundation is a partner and resource to organizations improving the quality of life in our region, and to those who want to give back locally, nationally and internationally.

## Joint Venture: Silicon Valley Network Investors Council

### PRIVATE SECTOR

Accenture  
Accretive Solutions  
Adobe Systems  
AeA  
Agilent Technologies  
Akeena Solar  
AMD  
Applied Materials  
AT&T  
Bank of America  
Bay Area Air Quality Management District  
Bay Area SMACNA  
Benhamou Global Ventures  
Berliner Cohen, LLP  
Bingham McCutchen, LLP  
Cadence Design Systems  
California Representative  
Cisco Systems  
Cogswell Polytechnical College  
Colliers International  
Comerica Bank  
CommerceNet S  
Con-way  
Cooley Godward, LLP  
Cypress Semiconductor Corporation  
Deloitte & Touche  
DLA Piper, LLP  
eBay Foundation  
El Camino Hospital Foundation  
Ernst & Young  
Fairmont Hotel  
Fogarty Institute  
Foothill-De Anza Community College  
District Foundation  
GreenWaste  
Google  
Grant Thornton, LLP  
Greenberg Traurig, LLP  
Half Moon Bay Brewing Company  
Health Trust  
Hewlett-Packard  
Hoge Fenton, LLP  
Hood & Strong, LLP  
Intero Real Estate  
JETRO  
Johnson Controls

Juniper Networks  
Kaiser Permanente  
Koret Foundation  
KPMG  
Lucile Packard Children's Hospital at Stanford  
McKinsey & Company  
Menlo College  
Microsoft  
Mission College  
Mitsubishi International Corporation  
Morgan Family Foundation  
O'Connor Hospital  
Oakland Athletics  
Orrick, Herrington & Sutcliffe, LLP  
Pacific Gas & Electric Company  
Packard Foundation  
Pipe Trades Training Center of Santa Clara County  
REgrid Power  
Robert Half International  
SamTrans/Caltrain  
San Francisco 49ers  
San José/Silicon Valley Business Journal  
San José Convention and Visitors Bureau  
San Jose Redevelopment Agency  
San José Sharks  
San José State University  
San José State University Research Foundation  
San José/Silicon Valley Chamber of Commerce  
SanDisk  
Santa Clara Building & Construction Trades Council  
Santa Clara County Office of Education  
Santa Clara University  
Santa Clara Valley Water District  
Silicon Valley Community Foundation  
Silicon Valley Hispanic Foundation  
Silicon Valley Power  
Skoll Foundation  
Sobrato Development Companies  
Solectron  
SolutionSet  
South Bay Piping Industry  
Stanford SPRIE  
Stanford University  
Studley  
SummerHill Land  
Sun Microsystems  
SunPower Corporation

SVB Financial Group  
Synopsis  
TDA Group  
Therma  
Trident Capital  
University of California, Santa Cruz  
Valley Medical Center Foundation  
Valley Transportation Agency  
Varian Medical Systems  
VoiceObjects, Inc.  
Volterra  
Webcor Builders  
Wells Fargo  
Wilmer Hale, LLP  
Wilson Sonsini Goodrich & Rosati, LLP

### PUBLIC SECTOR

City of Belmont  
City of Campbell  
City of East Palo Alto  
City of Foster City  
City of Fremont  
City of Gilroy  
City of Los Altos  
City of Menlo Park  
City of Milpitas  
City of Monte Sereno  
City of Morgan Hill  
City of Mountain View  
City of Newark  
City of Pacifica  
City of Palo Alto  
City of Redwood City  
City of San Carlos  
City of San José  
City of San Mateo  
City of Santa Clara/Silicon Valley Power  
City of Santa Cruz  
City of Sunnyvale  
City of Union City  
City of Watsonville  
Town of Los Altos Hills  
Town of Los Gatos  
County of San Mateo  
County of Santa Clara  
County of Santa Cruz



### JOINT VENTURE: SILICON VALLEY NETWORK

60 South Market, Suite 1000  
San Jose, CA 95113-1820  
t: 408 278-2294 f: 408 278-0280  
email: [info@jointventure.org](mailto:info@jointventure.org)  
[www.jointventure.org](http://www.jointventure.org)



### SILICON VALLEY COMMUNITY FOUNDATION

2440 West El Camino Real, Suite 300  
Mountain View, California 94040-1498  
t: 650 450-5400 f: 650 450-5401  
email: [info@siliconvalleycf.org](mailto:info@siliconvalleycf.org)  
[www.siliconvalleycf.org](http://www.siliconvalleycf.org)