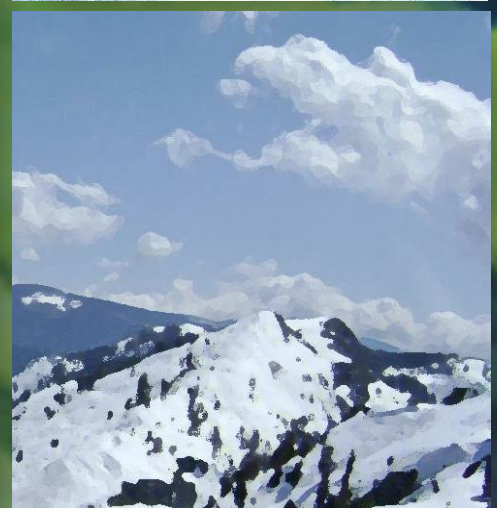


Fresno County 2016 Comprehensive Economic Development Strategy



Prepared by:
Fresno County EDC with
Wahlstrom & Associates
Strategy One

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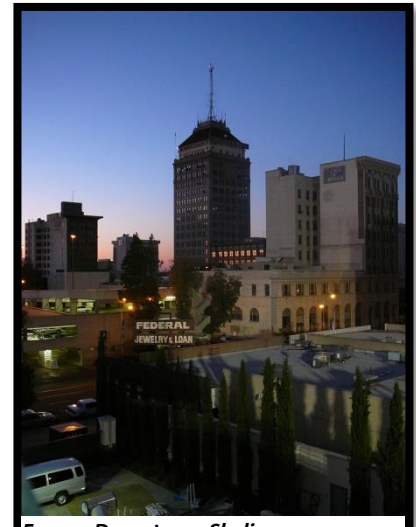
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1. EXECUTIVE SUMMARY

The 2016 Fresno County Comprehensive Economic Development Strategy (CEDS) documents the economic and political landscape that shapes local economic development efforts in unincorporated Fresno County plus 14 medium and small size cities. The City of Fresno has prepared its own CEDS that is attached to the appendix of this report.

An updated CEDS report complies with the U.S. Economic Development Administration's eligibility requirements for public works and technical assistance grants. Moreover, the CEDS can support federal or state funding applications submitted by the County or any Fresno County City, and the document can function as a true strategic plan that can help the Fresno County EDC deliver business attraction, expansion and retention services.



Fresno Downtown Skyline

Socioeconomic Trends

This report incorporates an extensive amount of information about Fresno County's socioeconomic trends. Some highlights are listed below

Demographic Trends

- Population growth rates in Fresno County have consistently exceeded California's growth rates
- New migrants from Latin America have fueled Fresno County's population growth
- Fresno County has a young population with a median age of 31.2
- Fresno County's adults have completed a very low level of formal education as more than 25 percent did not complete High School and only 13 percent have earned a bachelor's or an advanced degree
- The average annual household income of \$65,300 amounts to 73 percent of California's average annual household income of \$89,900
- More than one-fourth of Fresno County households earn incomes below the federal poverty standards
- Home values are only 43 percent of the average California home

Economic Trends

- Fresno County has added 27,000 new private sector jobs since 2010, but the growth rate significantly lags California's growth rate

- Fresno County produces 13 percent of California's agricultural output valued at \$7.04 billion
- Agriculture is Fresno County's largest industry generating 47,300 jobs, with health care services second at 31,700
- Visitors to Fresno County spent \$1.16 billion, which generates 14,130 jobs



Fresno County Fig Orchard

Fresno County's Economic Development Opportunities

The body of the report includes an economic development strengths, weaknesses, opportunities and threats (SWOT) analysis identifying the county's economic development opportunities listed below.

- Implementation of High Speed Rail (HSR) project with a stop in Downtown Fresno
- Attract the HSR Heavy Maintenance Facility and University Training Center
- Capitalize on EDA's Investing in Manufacturing Alliance Partnership designation
- Capitalize on efforts to create a world-class Career Technical Education Ecosystem
- Water conservation technology and alternative energy innovations
- Water supply expansion efforts to support the agricultural sector
- Create a regional brand for agricultural products produced in Fresno County
- Diversify agriculture with high value specialty crops to support year-round employment
- Expand Ag Manufacturing to capitalize on Ag Supply chain in Fresno County
- Support agricultural tourism and destination entertainment initiatives
- Attract additional conferences and business meetings to the Cities of Fresno and Clovis
- Expand renewable energy projects in Fresno County
- Support local business export and foreign direct investment activities
- Expand the Health Care industry

Industry Attraction and Expansion Targets

The body of the CEDS report identifies industry attraction and expansion targets that will support and elevate wages, and can realistically be attracted to Fresno County. Some of the attraction and expansion targets listed below will want to locate in the Fresno metropolitan area rather than the small cities dispersed away from the Cities of Fresno and Clovis. The methods

and data used to identify industry targets are included in the report. They are in order by industry code.

- Agriculture and Support Activities
- Construction
- Food and Beverage Manufacturing
- Machinery Products Manufacturing
- Electronic Products Manufacturing
- Motor Vehicle Parts Wholesale Trade
- Machinery Equipment & Supplies Wholesale Trade
- Grocery Products Wholesale Trade
- Electronic Products Wholesale Trade
- Truck & Other Ground Transportation
- Transportation Support Activities
- Broadcasting
- Legal Services
- Accounting & Payroll Services
- Management & Technical Consulting
- Advertising & Public Relations
- Health Care



Industrial Park

Community Profiles

The body of the CEDS report includes detailed information that presents a clear picture of demographic and economic trends in each medium and small city.

Regional Economic Development Goals and Strategies

Seven regional economic development goals were identified through a process of reviewing existing documents, CEDS Strategy Committee meetings, research findings and stakeholder interviews throughout Fresno County. The goals listed below apply to the entire county and cut across the jurisdictional boundaries of individual cities.

- Expand job creation
- Increase household incomes and wages
- Improve educational attainment and workforce training
- Improve backbone infrastructure
- Encourage sustainable agricultural production
- Enhance Fresno County as a regional economic development hub
- Strengthen connections between community needs and available resources

The body of the report further describes regional strategies that can accomplish the goals.

Local Economic Development Goals and Strategies

The body of the report also identifies the economic development goals and strategic initiative priorities for each city. The information was collected from a review of general plans, other studies, stakeholder interviews and follow up email exchanges with City Staff.

Benchmarks and Performance Measures

Economic development activities initiated by Fresno County and 14 medium and small cities can measure outcomes and document progress toward accomplishing the regional economic development goals. The goals, performance measures and data that could be collected to report progress can be found in the body of the report.



Fresno County Raisin Harvest

Economic Resilience

Fresno County's ability to survive and adapt to sudden acute shocks such as earthquakes, floods, and disease outbreaks, other extreme weather events or unexpected economic shocks is a measure of economic resilience. Strategies to strengthen Fresno County's economic resiliency are listed below.

- Encourage water conservation
- Improve education and workforce training
- Strengthen "brand" Fresno
- Promote Fresno County as a visitor destination
- Accelerate access to reliable and clean energy

2. INTRODUCTION AND APPROACH

2.1 What is the Fresno County Comprehensive Economic Development Strategy (CEDS)?

The Fresno County CEDS documents the economic and political landscape that shapes local economic development efforts in unincorporated Fresno County plus 14 medium and small size cities.¹ The 15th jurisdiction is the City of Fresno, which dominates the County's economy and functions as the region's business and cultural center, transportation hub and the governmental center in Fresno County. Approximately 82 percent of the private sector jobs and 53 percent the County's residents live in the City of Fresno.



This Comprehensive Economic Development Strategy (CEDS) documents the past trends, existing conditions, and future opportunities to strengthen and diversify the County's economy. The report analyzes the local and regional socioeconomic trends, and it details the initiatives that are being planned or implemented. The City of Fresno prepared its own CEDS report in 2015, which is attached as an appendix to this report. Thus, the City's economic development goals, plans, initiatives and implementation actions are intentionally not included in this report.

¹ The Cities of Clovis, Fowler, Selma, Kingsburg, Reedley, Sanger, Orange Cove, Parlier, San Joaquin, Kerman, Firebaugh, Mendota, Coalinga and Huron are included incorporated into this CEDS report.

An updated CEDS report complies with the U.S. Economic Development Administration's eligibility requirements for EDA public works as well as planning and technical assistance grants. An updated CEDS report can also support funding applications to other federal and state agencies that may be submitted by the County or any of the 14 cities.

Most importantly, this CEDS update can function as a true strategic planning document that describes the strengths, weaknesses, opportunities and threats that shape the economic development initiatives within Fresno County's local government jurisdictions. The strategic planning aspect of the CEDS update can improve collaborations between the small and mid-sized cities, facilitate the improvement of public and private partnerships, and help the Fresno County EDC deliver business attraction, expansion and retention services.



Fresno Co. EDC Annual Real Estate Event

2.2 CEDS Planning Process

The 2016 CEDS update obtained input from the broad range of public and private sector regional stakeholders. Interviews were conducted with the City Manager or their staff representative in all 15 cities, seeking information about private sector investments that will create jobs, and each jurisdiction's local economic development strategies, initiatives, and implementation capacity. Follow up email exchanges clarified the information obtained during the initial interview. Figure 1 below identifies the list of people and organizations interviewed.

Figure 1- List of People Interviewed

Contact	City or Business	Title
Esther Cuevas	Fresno EDC	Vice President
Margo Lerwill	Fresno EDC	
Jean Rousseau	County of Fresno	CAO
Larry Westerlund	City of Fresno	ED Director
Kelly Trevino	City of Fresno	ED Analyst
Andy Haussler	City of Clovis	Community and ED Director
Israel Lara, Jr	City of Parlier	City Manager
Tim Chapa	City of Sanger	City Manager
Dan Spears	City of Sanger	CD Director
John Mulligan	City of Sanger	Public Works
Nicole Zieba	City of Reedley	City Manager
Roseann Galvan	City of Selma	Administrative Analyst
Samuel Escobar	City of Orange Cove	City Manager
David Elias	City of Fowler	City Manager

Alexander Henderson	City of Kingsburg	City Manager
Brian Angus	Fresno EOC	CEO
William Kettler	County of Fresno Planning	Div. Mgr.
Layla Forstedt	Fresno/Clovis Convention & Visitor's Bureau	President
Gay Fontana	Fresno/Clovis Convention & Visitor's Bureau	VP
Jack Castro	City of Huron	City Manager
John Kunkel	City of Kerman	City Manager
Patrick Keough	City of Coalinga	Mayor Pro Tem
Sean Brewer	City of Coalinga	CD Director
Freddy Valdez	City of Firebaugh	Mayor
Ben Gallegos	City of Firebaugh	Public Works Dir
Matt Flood	City of Mendota	Planning & ED
Diana Brooks	City of San Joaquin	Asst. City Manager
Ryan Jacobsen	Farm Bureau	CEO/Exec Dir
David Fey	LAFCO	Exec Officer
John Brelsford	Diversified Development	President
Mike Dozier	Office of Com & ED, Fresno State	Executive Dir
David Zoldoske PhD	Intl Center for Water Technology, Fresno State	Director
Blake Konczal	Fresno Regional Workforce Dev. Board	Director
Sam Geil	Manufacturing Alliance	President

Additional community input was obtained from the CEDS Strategy Committee that the Fresno County EDC assembled. Figure 2 below provides a list of the CEDS Strategy Committee members that provided clarity and input into this report. The Committee met four times between May and October of 2016 to discuss the socioeconomic trends and the local economic development initiatives.

Figure 2- Strategy Committee

City or Business	Contact	Title
County of Fresno	Gigi Gibbs	Community Dev Manager
County of Fresno	Steve White	Director, Dept. of PW & P
Fresno EDC	Esther Cuevas	Vice President
Fresno EDC	Lee Ann Eager	Pres/CEO
City of Fresno	Kelley Trevino	ED Analyst
Sol Development Associates, LLC	Al Solis	Principal
Fresno Economic Opportunities Commission	Brian Angus	CEO
CEI Engineering Associates, Inc.	Walt Plachta	Dev. Leader
California Health Sciences University	Florence Dunn	President
City of Kingsburg, 5-Cities EDA	Alexander Henderson	City Manager
City of Clovis	Andy Haussler	Community and ED Director
Fresno Housing Authority	Preston Prince	CEO
Fresno/Clovis Convention & Visitor's Bureau	Layla Forstedt	President
Fresno/Clovis Convention & Visitor's Bureau	Gay Fontana	VP
Southeast Fresno Community EDA	Jose Leon Barraza	CEO
Fresno Regional Workforce Development Board	Blake Konczal	Director
Workforce Connection	Christine Nutting	Deputy Dir. Business Services, HR and Organizational Dev.
Office of Com & ED, Fresno	Mike Dozier	Executive Dir

3. SOCIOECONOMIC TRENDS

3.1 Regional Demographics

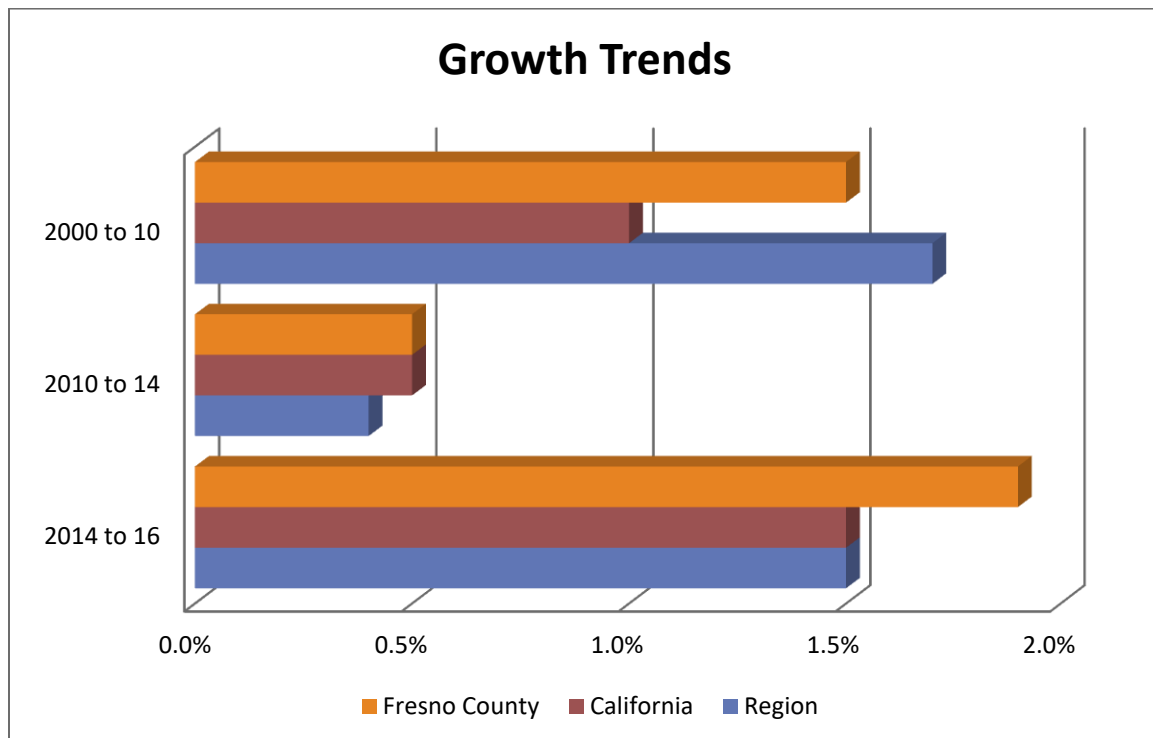
Population Growth Trends

Fresno County experienced strong population growth rates between 2000 and 2010 with a net gain of more than 131,000 new people. The demographic growth rates were very strong during the first decade of the millennium with Fresno County's population expanding at a 1.5 percent annual growth rate and California expanding at a 1.0 percent annual growth rate as shown in Figure 3.



Another 18,000 people were added to Fresno County's population base between 2010 and 2014. However, growth significantly slowed down to a 0.5 percent annual growth rate in both Fresno County and California.

Figure 3- Annual Population Growth Rates in Fresno County, Region and California: 2000 - 2016



Rapid population growth has resumed since 2014 as Fresno County added 35,000 new people during the past two years. The data indicates that Fresno County's population is expanding by 1.9 percent, a faster rate than any time since 2000.²

Fresno County's population growth since 2010 was generated by 48,000 more births than deaths. The number of people that immigrated into Fresno County is the same as the number of people that migrated out of Fresno County during that same time period. However, new people from Latin America that migrated into Fresno County replaced the long-term residents who have moved away from Fresno County to other California and U.S. locations.³



New Construction by DDG in Fresno

Population by Age

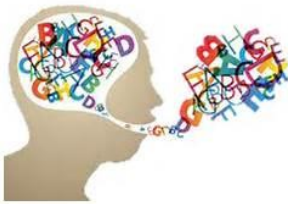
Fresno County is young with a median age of 31.2, more than 4



years younger than California's median age of 35.6. About 60 percent of Fresno County residents are within the working age demographic age 20 to 64.⁴ While 43 percent of Fresno County's residents are either younger than 20 years old or older than 65 years old, and thus they are not participating in the labor force.

Language Spoken at Home and Population by Race

Surprisingly, the mix of languages spoken in Fresno County is very similar to the mix of



languages spoken throughout California with 56 percent of Fresno County residents speaking English at home and 33 percent speaking Spanish compared to only 29 percent of California residents that speak Spanish as their primary language at home. Ten percent of California residents speak an Asian language at home compared to only 6 percent of Fresno County residents.⁵

Latinos comprise 51 percent of Fresno County residents compared to 38 percent of California residents. Caucasians comprise 39 percent of residents in California compared to only 32 percent of Fresno County's population.⁶

² See Appendix Table A-1

³ See Appendix Table A-2

⁴ See Appendix Table A-3

⁵ See Appendix Table A-4

⁶ See Appendix Table A-5

Levels of Education Attained

Fresno County's adult population has



completed a very low level of formal education, which is a significant

economic development constraint. More than 25 percent of Fresno County adults did not complete high school compared to only 19 percent of adults throughout California.

On the other end of the educational scale, only 13 percent of Fresno County adults have completed a bachelor's or an advanced degree, compared to 20 percent of adults throughout California. Seventy-three percent of Fresno County adults completed High School compared to 81 percent of California adults.⁷



Table Grape Harvest in Fresno County

Incomes

Fresno County households earn an average of \$65,300 per year of income, which is only 73

percent of the average household income throughout California.

The gap between household incomes in California and Fresno County has remained consistent since 2000.⁸



Larger income distribution gaps make a significant contribution to Fresno County's relatively low average household incomes. Forty

percent of Fresno County households earn less than \$35,000 per year compared to 29 percent of California households. Conversely, only 18 percent of Fresno County households earn average incomes greater than \$100,000 per year compared to 30 percent of California households.⁹ This income disparity gap drives down Fresno County's average household income.



Mural Art in Selma

⁷ See Appendix Table A-6

⁸ See Appendix Table A-7

⁹ See Appendix Table A-8

Poverty Rates

High rates of poverty are directly related to Fresno County's relatively low incomes and high income distribution gaps. The most recent data indicates that more than one-fourth (27%) of Fresno County households earn incomes below the federal poverty standards compared to 16 percent of households throughout California. Children and youth under 18 years of age comprise nearly half (46%) of the Fresno County residents living in poverty.¹⁰

Home Values



Housing in Fresno County

Housing values are a function of supply and demand market forces and an indicator of Fresno County's economic conditions and quality of life perceptions. The 2015 value of Fresno County's average single family home was \$193,000 at the end of 2015, which amounts to only 43 percent of the \$449,000 value of single-family homes throughout California.

This large gap in housing prices means that Fresno County home-owners are benefitting less from California's hot

housing market since the recovery started in 2010, and Fresno County has also not kept pace with the rapid appreciation of housing values throughout California. The average inflation adjusted value of California's single-family homes appreciated by 22 percent or \$81,000 between 2010 and 2015. In comparison, Fresno County home values appreciated by only 5 percent or \$8,700 since 2010.¹¹

Essentially, Fresno County's home value gap is expanding and the area is actually falling further behind the state in terms of home values. However, the disparity of housing prices can be repositioned as an economic development asset making the area attractive to individuals and business establishments seeking more affordable locations away from the high cost Bay Area and Southern California communities.

¹⁰ See Appendix Table A-9

¹¹ See Appendix Table A-10

3.2 Regional Economic Trends

Employment Growth Trends

A review of past employment trends provides some insight about job growth in Fresno County relative to the region, and how the various boom and bust economic cycles have affected the local economy. The growth trends described in the sections below are segmented into three time blocks, consistent with the state and national economic boom and bust cycles.

Post Dot-com Boom and Bust (2001 – 2007)

The dot-com boom and bust era that occurred between 1997 and 2000 generated record high stock market valuations before the 2001 internet bubble collapse that resulted in a loss of wealth and a halt in the steady household income gains experienced during the 1990s.

California lost 163,000 jobs between 2001 and 2003 but the post dot-com recovery was strong enough to generate a net gain of 590,000 new private sector jobs by the end of 2007.¹²

Figure 4- Private Sector Employment Trends in Fresno County, Region: 2001 - 2007

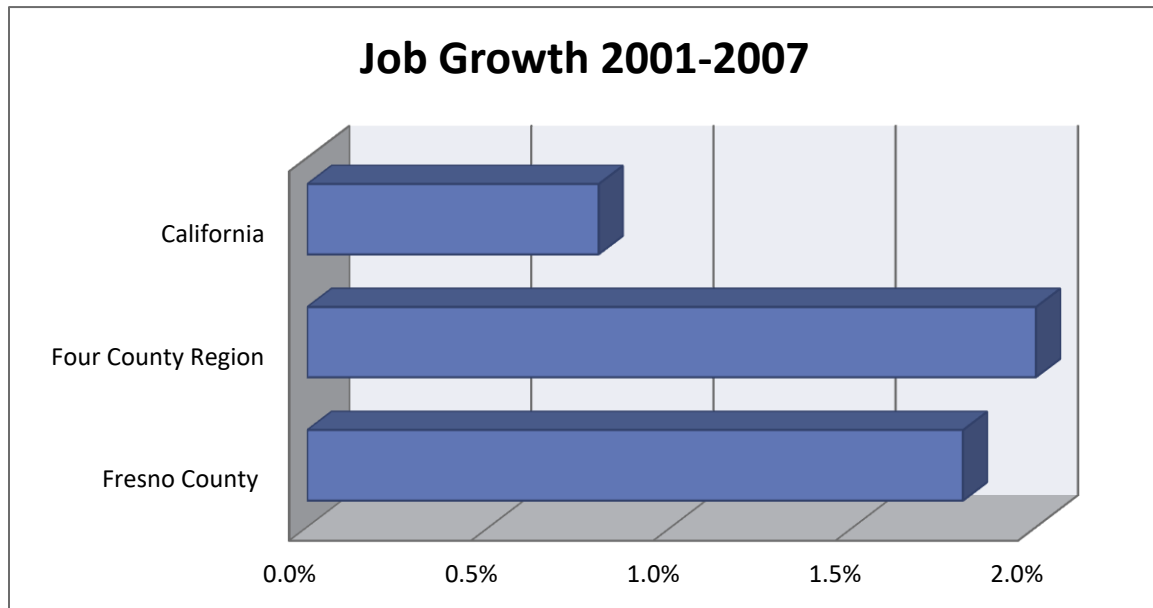


Figure 4 shows that Fresno County was less affected by the dot-com bubble and added nearly 31,000 new private sector jobs between 2001 and 2007.¹³ Fresno County expanded employment at a 1.8 percent annual growth rate, and the four-county region expanded at a 2.0 percent

¹² See Appendix Table A-11

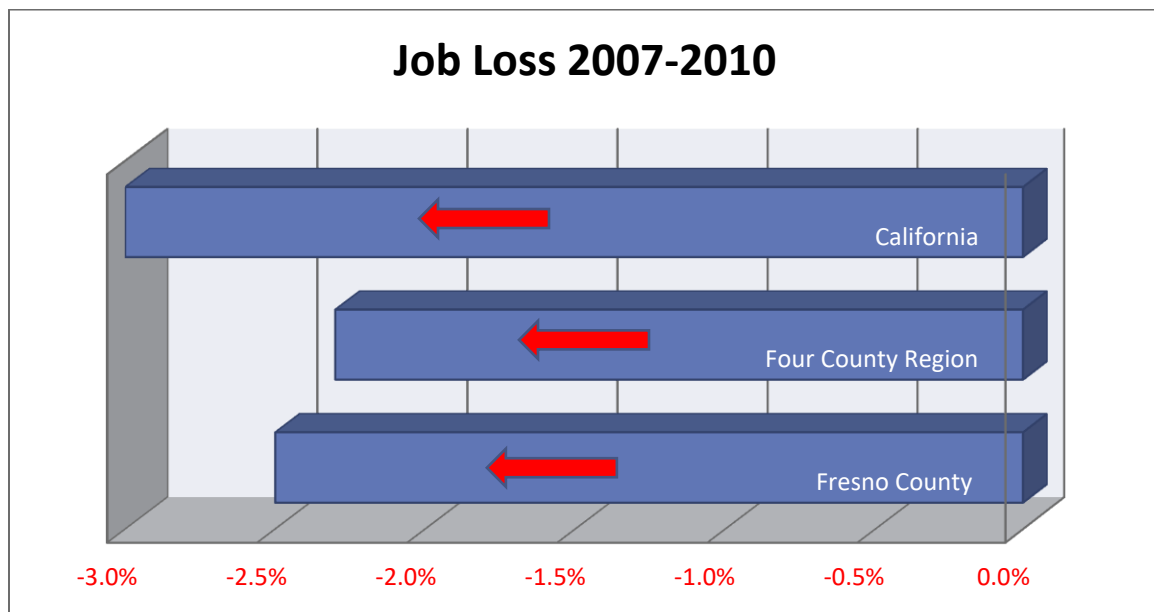
¹³ See Appendix Table A-12

growth rate, both of which more than doubled California's relatively slow employment growth rate of 0.8 percent.¹⁴

The Great Recession (2007 – 2010)

The great recession led to the loss of 8.7 million U.S. jobs and a 5.1 percent contraction of the national GDP. California lost approximately 1.15 million private sector jobs during this three-year time period, which amounted to a 3.0 percent annual job loss rate (See Figure 5). The construction industry accounted for 330,000 jobs lost, manufacturing lost 220,000 jobs, professional and business services lost 190,000 jobs, retail trade lost 170,000 jobs and finance lost 140,000 jobs.

Figure 5- Private Sector Employment Trends in Fresno County, Region, State: 2007-2010

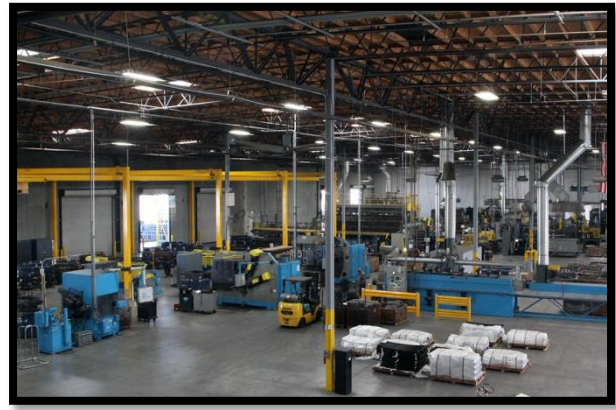
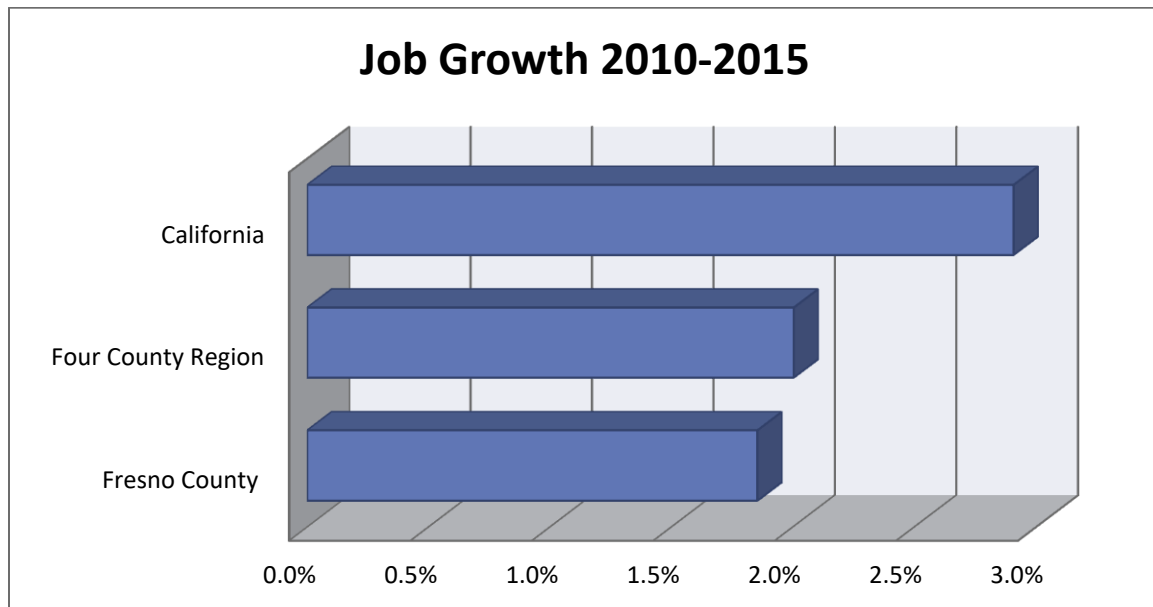


Fresno County also experienced a loss of 21,400 jobs between 2007 and 2010. The pain was severe but Fresno County's 2.5 percent annual job loss and the four-county region's 2.3 percent job loss rate was slower than California's rate of job loss. Fresno County's construction industry took the brunt of the pain losing 9,000 jobs accounting for 42 percent of the lost jobs. The manufacturing sector lost 4,000 jobs, retail trade lost 3,500 and health care lost 2,500 jobs. Public sector employment lost 500 jobs during the recession and the agricultural sector lost 2,100 jobs.

¹⁴ See Appendix Table A-13

Post-Recession Recovery (2010 – ongoing)

The California economy added 1.87 million new private sector jobs during the past five years, since emerging from the recession in 2010. Many of the jobs lost during the recession were replaced by high paying professional and technology jobs or new low-wage service and retail sector jobs, which expanded at a 2.9 percent annual growth rate between 2010 and 2015. The largest gains are among the professional and business service sector (420,000 jobs), health services (400,000 jobs) and leisure and hospitality (328,000 jobs). The construction industry has even rebounded, adding 170,000 new jobs.

*Betts Manufacturing***Figure 6- Private Sector Employment Trends in Fresno County, Region, State: 2010 - 15**

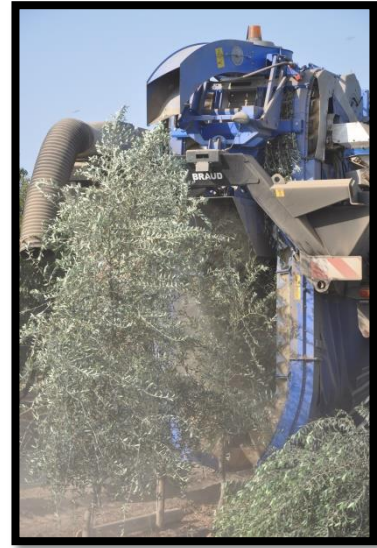
Fresno County's economy added only 26,600 new private sector jobs between 2010 and 2015 meaning that it took eight years to recover from the job loss created by the Great Recession. Although the local economy has partially recovered, the 1.9 percent annual growth rate significantly lags California's 2.9 percent annual growth rate and reverses the past trends of Fresno County's job growth exceeding California's job growth (See Figure 6). The health care sector accounts for 42 percent of private sector jobs created in Fresno County since 2010. Low wage paying retail, leisure and hospitality establishments account for 9,600 new jobs. Construction has partially recovered adding 3,000 new jobs.

Essentially, California's job growth rate fueled by technology and knowledge intensive industries have greatly exceeded Fresno County's job growth rate since 2010 reversing the historical growth trends where Fresno County's job growth rate was significantly stronger than California's job growth rate.

3.3 Agricultural Growth Trends

The production of fruits, vegetables, nursery products, field crops, livestock and poultry is a critical component of Fresno County's economic base. Farms generated 47,300 jobs in 2015, which makes agriculture the largest employer. Of course, additional jobs and value added are created by the many businesses that buy, sell and distribute agricultural products, and provide services, equipment and supplies through business-to-business sales.

Fresno County produced \$7.04 billion of agricultural products in 2014 which amounts to 13 percent of California's agricultural output. Although the production of fruits, nuts and vegetables was very strong, the area lags well behind the value of livestock and poultry produced in Tulare County (\$3.6 billion compared to \$1.9 billion).¹⁵ Since 2009, the value of fruits, vegetables and field crops produced in Fresno County expanded by less than \$500 million. In addition, Fresno County's crop production growth rates lag significantly behind the growth rates in the neighboring counties of Tulare, Madera and Kings.



Olive Harvest



WET Center – Fresno State

Ongoing research and development of new farm production and water conservation technologies will be a key factor shaping Fresno County's efforts to remain competitive, generate jobs and reinforce Fresno County's brand as a global leader in agricultural production processing and innovation.

¹⁵ See Appendix Table A-14

3.4 Tourism Trends

Visitors travel to Fresno County for a variety of reasons including business travel, conventions, visits to friends and family, destination travelers and day-trips. Business travelers usually stay in a hotel or motel although Airbnb is becoming increasingly popular. Visitors to friends and family will stay in private homes or at nearby lodging facilities. Destination travelers visiting various outdoor recreational venues may camp, or they may stay at an improved lodging facility or resort. Day-trippers do not stay overnight by



Fresno Chaffee Zoo

definition. However, a segment of visitors to Yosemite, Sequoia or Kings Canyon National Parks do stay overnight in Fresno County, using a local lodging facility as a staging area for a day trip into one of the parks or the beginning of a multiple day trip into the Sierras.

The Fresno/Clovis Convention & Visitor's Bureau (CVB) is the primary entity organized to promote events and destinations that attract out of town visitors to spend time and money in the area. Their efforts promote the area's proximity to the nearby National Parks as well as lakes, rivers, wineries or other Fresno County seasonal destinations such as the Blossom Trail or

the China Peak Mountain Resort ski area. The CVB promotes various shopping destinations, entertainment venues and cultural events that are primarily located in the City of Fresno.



Kings Canyon

The most recent 2015 data indicates that visitors to Fresno County spent \$1.16 billion, which generates 14,130 jobs. Thirty percent of visitor spending was at restaurants and food stores, 24 percent was on transportation costs, 17 percent on lodging, 17 percent on retail and 12 percent on arts and entertainment.¹⁶

¹⁶ See Appendix Table A-15

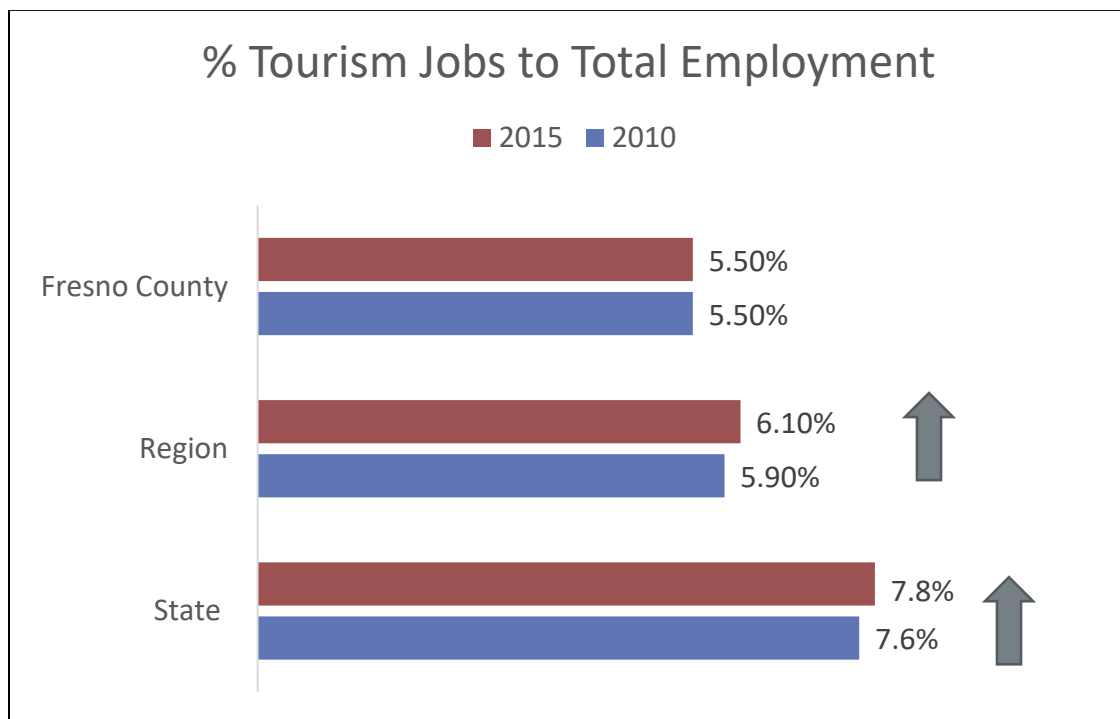
Fresno County added 1,780 tourism jobs between 2010 and 2015, which amounts to 5.5 percent of the 32,300 private sector jobs that were added to Fresno County's private sector economy. Figure 6 below shows that Fresno County's tourism sector experienced steady growth consistent with the total growth of employment.



Shinzen Japanese Gardens

California's tourism industry employs 1.06 million people, which comprises 7.8 percent of California's private sector jobs (2015). California's tourism sector generated 167,100 new jobs during the past five years, expanding from 7.6 percent of the State's private sector jobs in 2010. It makes sense that tourism comprises a larger share of California's economic base given the number of well-known global destinations in the coastal areas and in the Sierra Nevada Mountains.

Figure 7 - Tourism Market Share



4. SWOT ANALYSIS

A summary of Fresno County's economic development strengths, weaknesses, opportunities and threats (SWOT) is described below.



4.1 Strengths

Fresno County's economic development assets or strengths are listed below.

- Central location can serve both the Bay Area and the Southern California markets- chosen as top location in CA for Logistics and Distribution by *Area Development*
- Large, available workforce
- Good freight and rail system
- Cultural diversity
- International airport with non-stop passenger air service to 10 U.S. cities and Guadalajara, Mexico
- Strong agricultural sector that is ranked #3 Ag producing county in the nation
- Ranked #1 Water Technology Cluster in the nation for commitment to innovation and water conservation technologies introduced to farms and value added manufacturers
- Publically funded Community Colleges available to Fresno County residents that serve 36,000 students include Fresno City College, Reedley College, Clovis Community College and West Hills College in Coalinga
- California State University that serves 22,400 students also functions as an important cultural and sporting event venue
- Fresno County's location provides residents with easy access to three national parks, local wineries and other outdoor recreational amenities in the Sierra foothills
- Relatively low cost housing can help attract residents and businesses to relocate to Fresno County
- Good hospitals and health care facilities can help attract new residents and businesses
- Great school systems in some communities can help attract new residents and businesses
- Fresno EDC assists under staffed local governments with marketing, planning and implementing local economic development initiatives
- Cooperative working environment of collaboration between agencies and organizations improves the effectiveness of community economic development initiatives.
- Good year-round weather is an asset for both tourism activity, commuting and for industry outdoor storage

4.2 Weaknesses

Fresno County's economic development weaknesses or constraints are listed below.

- Negative self-image constrains recruitment efforts
- Double digit unemployment rate, higher than State and Nation
- Low educational attainment in both K-12 and higher education
- Lack of semi-skilled and skilled workforce in manufacturing and other skilled industries
- Lack of manufacturing apprentice and intern programs
- Language barriers among some workers affects job readiness for higher paying occupations
- Low school performance in some communities
- Ground water supply and quality is constrained by the drought
- Central Valley Water Project flow restrictions has removed hundreds of acres of land from agricultural uses
- Poor air quality
- Lack of a diverse industrial base
- Lack of shovel ready business sites
- Lack of transparency about development impact fees
- Process of annexing unincorporated areas is often cumbersome
- Inadequate broadband availability in the rural areas
- Lack of small city fiscal resources to fund infrastructure and service improvements
- Poor street maintenance in unincorporated county areas
- Lack of staff capacity to implement local economic development initiatives
- Air service is expensive raising the costs of travel for personal or business use
- Lack of passenger rail service to Southern California
- High levels of poverty and low wages earned relative to the State



San Luis Reservoir, Fresno County

4.3 Opportunities and Business Expansion and Attraction Targets

Opportunities

Fresno County's economic development opportunities are listed below.

- Implementation of High Speed Rail project with a stop in Downtown Fresno
- Potential selection of Fresno for the High Speed Rail Heavy Maintenance Facility

- Potential to capitalize on EDA's Investing in Manufacturing Alliance Partnership designation for 28 Central Valley counties¹⁷
- Capitalize on efforts by the San Joaquin Valley Manufacturing Alliance to create a world-class Career Technical Education Ecosystem to address the needs of a manufacturer's workforce gap
- Encourage innovation and entrepreneurship in water conservation technology and alternative energy
- Water supply expansion proposals that can support ongoing agricultural development efforts
- Market Fresno County agriculture industry as a regional brand
- Plant new crops and diversify agriculture to support year-round employment
- Support agricultural tourism and destination entertainment initiatives
- Attract additional conferences and business meetings to the Cities of Fresno and Clovis
- Support proposals to expand renewable energy and continue the expansion of roof top solar
- Expansion of Health Care industry
- Attraction of diverse industry that will elevate the wages earned by Fresno County residents



High Speed Rail Construction in Fresno County

Business Expansion and Attraction Targets

A target industry analysis identified 19 business sectors that could expand employment through business expansion or attraction efforts. The business expansion and attraction targets listed in Figure 8 already have a strong presence in Fresno County, most are expanding employment faster than the region and the state, and they pay higher wages than Fresno County's average wage of \$35,800 per job.¹⁸ The industry targets listed in Figure 8 are described below. The data indicates that the business sectors described below can realistically expand employment within

¹⁷ <http://valleyvision.org/newsmusings/central-valley-named-one-of-12-regions-nationwide-for-federal-manufacturing-communities>

¹⁸ Source: See Appendix Table A-16 for detailed employment by industry information not available through the California Employment Development Department (EDD) confidential disclosure requirements.

Fresno County and the new jobs will elevate wages and salaries earned by Fresno County residents.

Figure 8- High Performance Business Sectors

Fresno County Business Sector Strengths	Presence Within the Region	Presence Within California	Growth Trends	Average Wage/ Job (\$35,800)	Average Wage per Job /CA
Farming					
Crop Production (15,500 jobs)	Below Average	Very Strong	Negative Growth	\$27,100	\$30,200
Ag Support Activities (29,700 jobs)	Below Average	Very Strong	Very Strong	\$23,200	\$24,800
Construction (14,900 jobs)					
Construction (14,900 jobs)	Above Average	Below Average	Average	\$47,000	\$58,200
Manufacturing (25,500 jobs)					
Food & Beverage (13,000 jobs)	Below Average	Very Strong	Moderate	\$35,800	\$59,900
Machinery Products (2,400 jobs)	Strong	Very Strong	Very Strong	\$53,500	\$59,000
Electronic Products (1,500 jobs)	Strong	Very Weak	Above Average	\$60,300	\$180,900
Wholesale Trade (13,800 jobs)					
Motor Vehicle Parts (1,100 jobs)	Very Strong	Strong	Very Strong	\$45,000	\$55,500
Machinery Equipment & Supplies (1,800 jobs)	Above Average	Very Strong	Very Strong	\$53,500	\$65,400
Grocery Products (3,700 jobs)	Very Strong	Very Strong	Very Strong	\$46,600	\$53,200
Electronic Products (1,300 jobs)	Above Average	Weak	Average	\$53,500	\$78,500
Transportation					
Truck & Ground Transportation (4,500 jobs)	Average	Very Strong	Above Average	\$40,400	\$43,900
Transportation Support Activities (2,100 jobs)	Strong	Above Average	Very Strong	\$41,600	\$42,000
Information & Professional Services					
Broadcasting (1,400 jobs)	Very strong	Very Strong	Strong	\$112,400	\$100,200
Legal Services (7,200 jobs)	Above Average	Above Average	Above	\$71,000	\$99,400
Accounting & Payroll Services (5,500 jobs)	Above Average	Very Strong	Very Strong	\$47,100	\$68,300
Architect & Engineers (5,500 jobs)	Above Average	Strong	Strong	\$59,900	\$84,700
Management & Technical Consulting (5,200 jobs)	Average	Above Average	Below Average	\$58,600	\$87,300
Advertising & Public Relations (2,700 jobs)	Strong	Strong	Strong	\$23,100	\$104,600
Health Care (31,700 jobs)	Average	Average	Very Strong	\$69,300	\$76,600

Agricultural and Construction Sector Targets

Farming Sector (NAICS 111)

Crop production currently generates 15,500 full time jobs in Fresno County and it should be a priority to retain these jobs given the long-term drought conditions and the constrained supply of water that has disrupted farming and caused many farms to discontinue production. Farming remains an important part of Fresno County's economic base, providing both jobs for lower-skilled workers and spin-off jobs in food processing, manufacturing and service industries. Although crop production pays an average wage of only \$27,100, the industry sector provides employment opportunities for workers that are not adequately prepared to work in other sectors of the economy.



Fig Orchard in Fresno County

Agriculture and Animal Production Support Activities (NAICS 115)

Support activities for crop and animal production currently generate 29,700 jobs, which is nearly twice the number of crop production jobs. The agricultural support activities sector pays low wages but provides important jobs for workers not ready to be employed in other sectors of the economy. The agricultural support service sector includes:

- Aerial dusting or spraying
- Farm management services
- Cotton ginning
- Planting crops
- Cultivating services
- Vineyard cultivation services

Construction (NAICS 23)

The construction sector includes establishments that are engaged in the construction of buildings, highways, utility systems or other engineering projects and currently employs 14,900



Centerville Kingsburg Canal

Fresno County workers. Construction is

a boom and bust industry highly dependent on short-term economic cycles and the demand to construct new housing. This business sector pays good salaries (\$47,000) and it should be nourished as an important element of the local economy.

Manufacturing Sector Targets

Three manufacturing sectors can realistically be attracted to the area as they already have a strong presence in Fresno County and, they are in an expansion mode relative to the region and the State. The industry expansion and attraction targets are listed in Figure 8, and a more detailed analysis is available in Appendix Tables A-16 and A-17.¹⁹

Food and Beverage Manufacturing (NAICS 311)

Food processing manufacturers employ 13,000 Fresno County workers and pay an average wage of \$35,800 per worker. The industry sector added 700 new jobs to Fresno County's economy during the past five years. Retaining the existing food processing manufacturing and supporting the expansion of existing firms will continue to add value to Fresno County's farm products and generate business-to-business sales that recirculate through the local economy and creates additional multiplier jobs.



Fresno is known for innovative food products like Mini pepper dipper cups from Baloian Farms. Photo by Craig Kohlrus, Fresno Bee

Machinery Products Manufacturing (NAICS 333)

Machinery manufacturing is a small component of the manufacturing sector that generates only 2,400 jobs within Fresno County. Establishments in this industry sector create end products such as gears and levers that are components of larger machines that forge, stamp, bend, and shape individual pieces of metal. Approximately 400 new machinery-manufacturing jobs were added to Fresno County's economy paying an excellent average wage of \$53,500. This industry is a very desirable target that can realistically be attracted to Fresno County because: a strong concentration of machinery manufacturing firms are already located in the area; and the growth trends in Fresno County relative to the region and the State are very strong.

Computer and Electronic Product Manufacturing (NAICS 334)

The manufacturing of computer and electronic parts is another relatively small employer that generates only 1,500 jobs, with 170 new industry sector jobs added to Fresno County's economy during the past five years. Industry establishments that manufacture computers, computer

¹⁹ Source: See Appendix Table A-17

peripherals, communications equipment, and similar electronic products pay an outstanding average wage of \$60,300. This industry is a very desirable target because Fresno County is an attractive location within the region and the local wage rates are significantly less costly to employers located in other high cost California locations.

Wholesale Trade Targets

Four wholesale trade sectors can realistically be attracted to the area because they already have a strong presence in Fresno County and they are in an expansion mode relative to the region and the State. The wholesale trade expansion targets all pay wages well above the average wage paid in Fresno County.

Motor Vehicles and Motor Vehicle Parts Wholesalers (NAICS 4231)

Wholesaling motor vehicles and motor vehicle parts is a relatively small sector of Fresno County's economy, generating only 1,100 jobs, including 180 new jobs during the past five years. The industry is a desirable target because motor vehicle wholesale establishments pay an average wage of \$45,000. The industry's strong presence in Fresno County and strong growth trends relative to the region and State makes it a target that can realistically be attracted to Fresno County.



Machinery Equipment and Supply Wholesalers (NAICS 4238)

Wholesaling machinery equipment generates 1,800 jobs in Fresno County, including 310 new jobs during the past five years. This industry sector includes establishments that are primarily engaged in the wholesale distribution of large machine equipment used for construction, mining, farm, garden, industrial, service establishment, and transportation. The industry is a desirable target because machinery equipment wholesale establishments pay an average wage of \$53,500. The industry sector's strong presence in Fresno County and strong growth trends relative to the region and State makes it a target that can realistically be attracted to Fresno County.

Grocery Product Wholesalers (NAICS 4244)

Grocery product wholesale establishments generate 3,700 jobs in Fresno County, including 610 new jobs during the past five years. This industry sector includes establishments that are primarily engaged in the wholesale distribution of packaged frozen food, dairy products, meats, seafood, fresh fruit, vegetables and other related grocery products. The industry sector is a desirable target because grocery wholesale establishments pay an average wage of \$46,600. Grocery wholesalers' very strong presence in Fresno County and very strong growth trends

relative to the region and State makes it a target that can realistically be attracted to Fresno County.

Wholesale Electronic Product Brokers (NAICS 425)

Wholesale brokers of electronic goods generate 1,300 jobs in Fresno County, including 220 new jobs during the past five years. This industry sector includes establishments that employ agents and brokers that arrange for the sale of electronic products on a fee or commission basis. They act on behalf of the buyers and sellers of goods to engage in business-to-business wholesale trade. The industry sector is a desirable target due to the average wage of \$53,500. The strong presence of electronic product wholesale brokers within the region makes this industry a target that can realistically be attracted to Fresno County.

Transportation Sector Targets

Two transportation sectors can realistically expand employment within the area because they already have a strong presence in Fresno County and they are in an expansion mode relative to the region and the State. The transportation sector expansion targets all pay wages well above the average wage paid in Fresno County.

Truck and Other Ground Transportation (NAICS 482 and 484)

Establishments engaged in the distribution of goods by truck or rail that pay an average wage of \$40,400 can realistically be attracted to Fresno County. Ground transportation establishments currently employ 4,500 in Fresno County, including 400 new jobs during the past five years. They have a very strong presence within California, supporting them as a good target.



Transportation Support Activities (NAICS 488)

Establishments engaged in transportation support activities such as motor vehicle towing or rail traffic management that pay an average wage of \$41,600 can realistically be attracted to Fresno County. Transportation support establishments that currently employ 2,100 Fresno County workers have added nearly 1,300 jobs during the past five years. These firms have a strong presence in the region and demonstrate very strong growth trends.

Information and Professional Service Targets

Seven service sectors can realistically expand employment within Fresno County. In general, the service sector targets pay good wages and demonstrate strong growth trends but they will tend to locate in a cluster near other business establishments, government services and the amenities needed to attract professional workers, like in the Cities of Fresno or Clovis. It will be more difficult (but not impossible) for the small cities located in east, south or west county to attract or expand employment among the service industry targets described below.



Broadcasting (NAICS 515)

Broadcasting is a small niche industry that pays very high wages and currently employs 1,400 Fresno County workers. Establishments engaged in broadcasting create, distribute and broadcast content via radio or television. The industry includes establishments that operate broadcasting studios and facilities for over the air or satellite delivery of radio and television programs of entertainment, news, talk, and the like.

Legal Services (NAICS 5411)

Legal services have a presence in nearly every Fresno County community. However, new legal service establishments will most likely locate in the City of Fresno with its concentration of federal, state and local government offices. Legal services are a very desirable business sector paying wages that average \$71,000 per job.

Accounting and Payroll Services (NAICS 5412)

Fresno County has a strong presence of accounting and payroll service establishments that employ 5,500 workers with an average wage of \$47,100. Firms in this sector will also tend to locate in the Cities of Fresno or Clovis where there is a large concentration of business establishments.

Architect and Engineers (NAICS 5413)

Fresno County has an above average presence of architect and engineering firms, and the growth trends relative to the region and State are very strong. A&E establishments currently employ 5,500 workers that pay an average wage of \$59,900.

Management and Technical Consulting (NAICS 5416)

Fresno County has an average presence of firms providing management or technical consulting services, and above average growth trends relative to the region and State. Management and technical consulting firms currently employ 5,200 workers that pay an average wage of \$58,600.

Advertising and Public Relations (NAICS 5418)

Fresno County has a strong presence of advertising and public relations establishments, and the growth trends relative to the region and State are very strong.

Advertising and public relations firms currently employ 2,700 workers that pay a lower wage in Fresno County but a very high wage of \$104,600 throughout California.



VA Hospital, Fresno

Health Care (NAICS 621, 622 and 623)

Fresno County's health care sector that includes hospitals, health care clinics and residential care facilities employs 31,700 workers and pays an average wage of \$69,300. Health care has an average presence in Fresno County and growth trends relative to the region are average but growth trends relative to the State are strong and a function of demographics. Health care can be attracted to Fresno County's small cities, which will spread the benefits of growth throughout the area.

4.4 Threats

The identified threats to Fresno County's economic development future are listed below.

- Continued water supply restrictions and poor water quality due to long-term drought and global warming
- New economic downturn or recession
- Continued low educational attainment in both K-12 and higher education
- Ongoing job displacement created by labor saving new technology such as robotics
- Ongoing brain drain and the need to retain skilled engineers and other professionals
- Lack of access to venture capital
- Growing health issues (i.e. asthma and mental illness) from pollution and poor air quality
- Large numbers of low income residents and a wide gap of income distribution

5. COMMUNITY PROFILES

The demographic and economic characteristics of each city in Fresno County are described in this section of the report. Demographic and economic data tables that back up the findings can be located in Appendix A. Tables A-1 to A-9 describe demographic trends in each city, and tables A-18 to A-32 describe employment by industry trends by zip code.

5.1 Fresno Metropolitan Area

The Cities of Fresno and Clovis comprise the Fresno Metropolitan Area where there is a large concentration of people and jobs.

Approximately 203,300 private sector jobs and 604,900 residents are located the Cities of Fresno and Clovis (2014 data). Essentially,

83 percent of the county's jobs and 64 percent of the county's population reside in the Fresno Metropolitan area. A larger share of jobs than residents demonstrates the Fresno Metropolitan area functions as an employment center for the workforce that is spread around Fresno County.

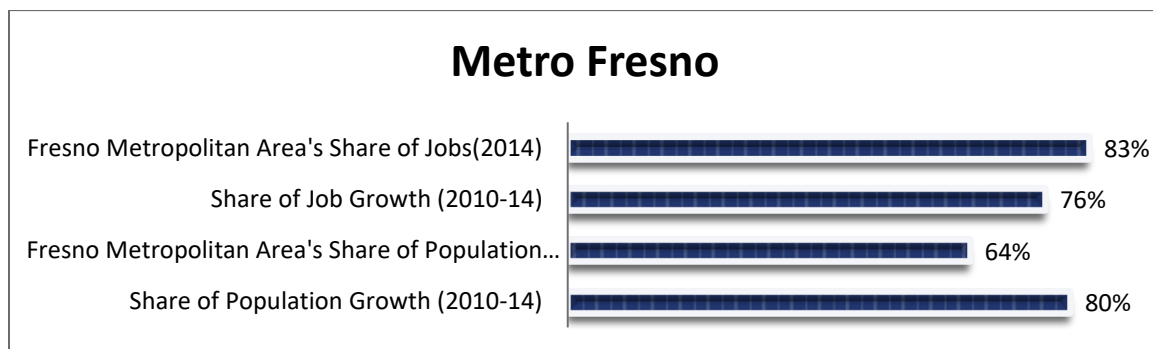


Fresno Downtown Skyline

Figure 9 below describes some significant changes in population and job growth dynamics within the Fresno Metropolitan area. Only 76 percent of the County's job growth was captured by the Fresno Metropolitan area since 2010, which indicates that jobs are gradually being dispersed around the county and less concentrated in the two primary cities.

Conversely, population growth trends indicate that Fresno County is becoming increasingly urbanized with a larger concentration of residents that choose to live in the metropolitan area. The combined Cities of Fresno and Clovis have captured 80 percent of the County's population growth since 2010, which is a significantly higher percentage than the two cities current share of County residents.

Figure 9- Fresno Metropolitan Area's Share of County Population and Jobs: 2010 - 2014



City of Fresno

The City of Fresno functions as the economic and cultural hub of Fresno County. The economy is comprised of a broad mix of production, distribution and service sector jobs that include older industrial areas, new business parks, trucking, air cargo, rail distribution facilities, and personal and professional service establishments.



Downtown Fresno functions as the region's governmental center that has attracted a large cluster of office buildings, hotels, and music and performing arts venues.

The Fresno Yosemite International Airport has attracted four passenger airlines that offer direct flights to more than 10 U.S. cities and Guadalajara, Mexico. The airport also functions as a FedEx, UPS and DHL air cargo distribution facility. The Amtrak that stops downtown provides affordable transportation connecting Fresno County to Bakersfield and the Bay Area. Rail freight services are provided by the Burlington Northern-Santa Fe and Southern Pacific railroads, and nearly 200 truck firms use Highway 99 and Interstate 5 to transport goods to national and world markets. Also, a High Speed Rail station is underway in downtown Fresno which will provide enhanced economic development opportunities and transportation options for the area.

Employment Growth Trends

The City of Fresno includes nearly 16,000 private sector business establishments that employ 174,500 people (2014 data). This means that 71 percent of Fresno County jobs and 86 percent of the jobs within the Fresno metropolitan area are located in the City of Fresno.²⁰

The largest sectors of the City's economy include health care (31,500 jobs), retail trade (23,700 jobs), lodging and food services (17,000 jobs), manufacturing (14,600 jobs) and wholesale trade (11,500 jobs).

Although 8,500 new jobs were created in the City of Fresno between 2010 and 2014, the rate of new jobs captured has significantly slowed down. Approximately 74 percent of county jobs were located in the City of Fresno back in 2010, but in the subsequent four years the City of Fresno captured only 44 percent of the jobs created in Fresno County.

²⁰ Source: See Appendix Table A-18

Management support services generated 3,300 new jobs in the City of Fresno between 2010 and 2014. Other components of the City's economy, that each created between 1,000 and 1,300 new jobs per sector, include: corporate management, health care, wholesale trade, accommodation and food services, professional services and private education.

Demographic Trends

The population characteristics and growth trends in the City of Fresno are described below.²¹

- The City of Fresno's population growth rate has slowed down since 2010, and new people are being added at a slightly slower rate than the total County.
- City residents are slightly younger than the entire County and 6 years younger than the average California resident.
- Latinos comprise 51 percent of Fresno County's residents, which is substantially higher than the 38 percent of California residents that are Latinos.
- One-fourth of adults living in the City of Fresno have not completed High School and only 20 percent earned a college degree.
- City of Fresno residents earn low incomes that average \$60,500 per household, well below the county average of \$65,300 and only 67 percent of California average household incomes.
- More than 40 percent of Fresno households that earns less than \$35,000 per year lack adequate resources to purchase housing and other basic goods and services.
- More than 30 percent of Fresno City residents earn below poverty rate incomes, including 44 percent of children and youth under 18 years old.
- Average value of a single family home in the City of Fresno is \$188,300, which is only 42 percent of California's housing value (2015).



Selland Arena, Fresno

²¹ Detailed data can be found in Appendix A, Tables A-1 to A-10

City of Clovis

The City of Clovis is Fresno County's most affluent community with an abundant housing supply, excellent schools and reputation as a desirable place to live, work and recreate. Clovis is also one of the few communities with some shovel ready sites available to accommodate new business. The City's location adjacent to the Fresno-Yosemite



California Health Services University

International Airport adds to its desirability as a venue for conferences and corporate meetings that takes advantage of the air cargo activities.

Clovis is in particularly good position to capitalize on the expanding health care sector as the Clovis Community Hospital is growing and adding more beds. The California Health Science School (Pharmacy) just expanded and there are plans to add five more medical schools.

Three established business areas include the Clovis Industrial Park, the Clovis Research & Technology Park and the Dry Creek Industrial Park. The Technology Park that was established in 2001 with an EDA Grant is growing. The original goal of attracting tech-savvy people has partially succeeded, though the park has developed a more diverse base. A privately funded business incubator was also established at the Technology Park.

Employment Growth Trends

Nearly 2,000 private sector business establishments that employ 28,800 people (2014 data) are located in the City of Clovis. Essentially, Clovis has captured 12 percent of Fresno County jobs and 14 percent of the Fresno metropolitan area jobs.²² The local economy is comprised of:

- Retail trade establishments - 6,400 jobs (22 percent of Clovis' private sector employment)
- Lodging and restaurants - 4,300 jobs
- Health care - 3,400 jobs

²² Source: See Appendix Table A-19

- Construction - 2,500 jobs
- Administrative support - 2,400 jobs
- Other services - 2,400 jobs
- Manufacturing - 2,100 jobs

More importantly, Clovis has dominated Fresno County's economy since the end of the recession in 2010. More than 6,200 jobs were added to the Clovis economic base in just four years, which was a 28 percent expansion of jobs. Essentially, Clovis captured one-third of the 19,300 new jobs created in Fresno County between 2010 and 2014. The sectors that experienced the most job gains since 2010 include:

- Retail trade - 1,270 new jobs
- Administrative Support - 1,070 new jobs
- Lodging and restaurants - 930 new jobs

Demographic Trends

The population characteristics and growth trends in Clovis are described below.

- Clovis is experiencing very strong population growth rates, adding nearly 12,500 new residents since 2010.
- The majority of Clovis residents are Caucasian.
- Median age is 33.7, 1.5 years older than Fresno County's median age, but still younger than the average California resident.
- High rates of formal education that exceed State averages have been completed among adult residents of Clovis.
- Household income in Clovis (\$83,600) approaches the California average and is significantly higher than other Fresno County cities.
- An average home value of \$282,000 makes Clovis the most expensive housing market in Fresno County.



Valley Public Radio in Clovis



Business Park in Clovis

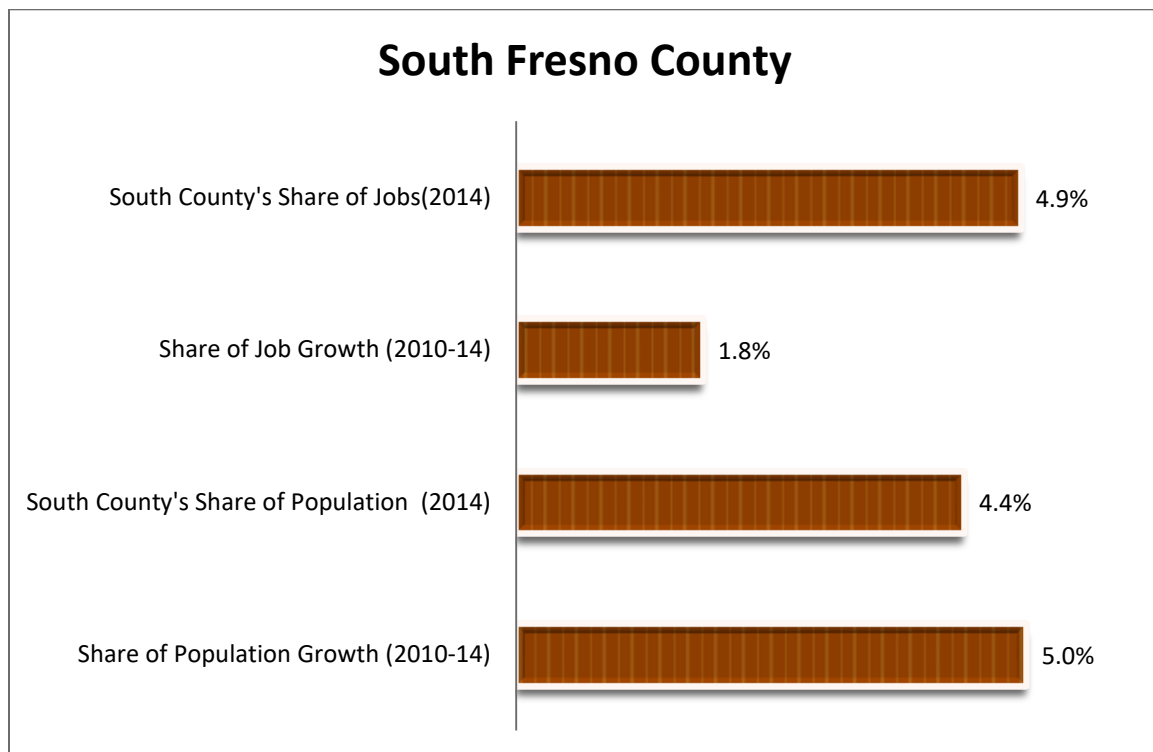
5.2 South County

The South County area includes the Cities of Fowler, Selma and Kingsburg where 40,300 live along with 790 private sector business establishments and approximately 12,000 private sector jobs (2014 data). The South County cities essentially have an even balance of jobs and residents with 4.9 percent of the county's jobs and 4.4 percent of the county's population.



Figure 10 below indicates that the balance of jobs and residents is changing, since the South County cities have captured only 1.8 percent of the County's job growth and 5 percent of the County's population growth since 2010. These trends indicate the area has become a more attractive residential location for commuters and is losing its historical share of jobs.

Figure 10- South Fresno County's Share of County Population and Jobs: 2010 - 2014



City of Fowler

Fowler is a small community of 5,900 residents located approximately seven miles south of Fresno on Highway 99.

Proximity to the Union Pacific railroad, major highways and business routes such as Highway 99, Golden State Boulevard, and Manning Avenue make Fowler an attractive business location for manufacturing and distribution establishments. The industrial corridor runs along the rail line and includes a rail yard intermodal facility located south of Manning Avenue.



Community Gathering in Fowler

Fowler is also known for its well-kept neighborhoods, attractive downtown, a good school district, and quality housing located within a close commute to Clovis and the City of Fresno. The perception of good schools and housing has contributed to making Fowler among the most desirable communities, with a \$228,000 average home value that is among the highest in Fresno County and prices increasing by 27 percent since 2010.

Fowler is in the process of permitting a new regional health care pediatric facility, Generations Green, along with other business attraction efforts and continued commercial development at the Merced/Highway 99 interchange. Unincorporated sites north of the City limits could be attractive to industrial and commercial users; but the land must be annexed, which will require LAFCO approval and the extension of infrastructure to the area.

Employment Trends

Approximately 130 private sector business establishments employ nearly 1,900 workers in Fowler (2014 data). This translates into less than 1 percent of Fresno County's job base.²³



Generations Green, new regional pediatric health center in Fowler

²³ Source: See Appendix Table A-20

(Footnote continued)

The city's primary economic drivers are listed below:

- Manufacturing establishments - 600 jobs (nearly one-third of Fowler's private sector employment and dominated by value added agricultural activities)
- Wholesale Trade - 240 jobs
- Transportation and Warehousing - 200 jobs
- Retail Trade - 180 jobs



Fowler's National Raisin Co. at Food Expo

Fowler actually lost 250 jobs between 2010 and 2014, which was primarily caused by the closure of one or more agricultural manufacturing establishments. The health care sector lost 50 jobs and construction lost 40 jobs. Wholesale trade was the only significant growth sector that added 100 new jobs.

Demographic Trends

Fowler has only 5,900 residents, and growth has flat lined the past two years. The city's age, ethnic composition, languages spoken at home, incomes earned, income distribution, educational attainment and poverty rate characteristics are very similar to Fresno County.

City of Selma

Selma's strategic location at the interchange of Highway 99 and Highway 43 places Selma in an ideal commercial location. Selma has capitalized on its strategic location to attract three regional shopping centers anchored by Wal-Mart, Home Depot and other major national chain stores along with significant auto dealerships that attract customers from neighboring Tulare and Kings Counties, and from as far away as Bakersfield and Modesto. Selma has become Fresno



Home Depot in Selma

County's per capita sales tax leader, ranking only behind the larger cities of Fresno and Clovis in total taxable sales.

Employment Trends

Approximately 390 business establishments that employ nearly 6,500 workers are located in Selma (2014 data). The number of jobs in Selma exceeds the 5,500 jobs located in the combined cities of Fowler and Kingsburg.²⁴ Selma's key economic sectors are listed below.



Basalite Concrete Products, Selma

- Retail Trade - 1,540 jobs (24 percent of Selma's jobs)
- Manufacturing – 1,120 jobs
- Wholesale Trade – 960 jobs
- Health Care – 840 jobs
- Accommodations and food services – 780 jobs

In addition, Selma added 820 new jobs to its economic base, and it was the only South County city that expanded jobs between 2010 and 2014. The sectors that experienced the largest gains were:

- Wholesale Trade – 510 jobs
- Retail Trade – 330 jobs
- Accommodations and Food Services – 130 jobs, and
- Transportation – 120 jobs

Demographic Trends

Nearly 25,000 people live in the City of Selma, which accounts for 3.2 percent of the County's population. The City's population is expanding at 2.1 percent annual growth rate, which is faster than the County's 1.9 percent growth rate and well above California's 1.5 percent growth rate. Relatively low home values of \$186,100 make Selma an attractive residential community for commuters to the City of Fresno and Clovis. Some key differences between the demographic characteristics of Selma and Fresno County are:

²⁴ Source: See Appendix Table A-21

- Approximately 77 percent of Selma residents are Latino, compared to 51 percent throughout Fresno County.
- More than half of Selma residents speak Spanish as their primary language, compared to only one-third of Fresno County residents.
- Selma adults have completed relatively low levels of formal education compared to the county average. Only 59 percent of Selma adults have completed high school and only 7 percent having earned a Bachelor's degree.
- Selma is a low-income community earning a \$55,400 average household income compared to the \$65,300 income earned by the average Fresno County household.
- Only 1 percent of Selma households earn more than \$150,000 per year, compared to 7 percent of Fresno County households and 15 percent of California households.

City of Kingsburg

Kingsburg is one of Fresno County's more affluent communities with higher incomes, housing values and rates of formal education completed. The Swedish architecture and the Highway 99 location make Kingsburg an attractive location for lodging, food services, retail, and distribution establishments.



Kingsburg Car Show

Approximately 59,000 vehicles per day travel along Highway 99 through Kingsburg, some of which stop to eat in the downtown or stay in the cluster of visitor lodging facilities developed near the highway.

Major corporations such as Sun-Maid Raisins, Guardian Glass and Sacramento Container Company operate facilities in Kingsburg. The city's location along the Highway 99 corridor can attract additional companies that want easy access to the rest of the Central Valley, the Bay Area and the Southern California market areas. Three business parks in Kingsburg include some shovel ready sites plus additional undeveloped land that may need infrastructure improvements. Kingsburg schools also have an excellent reputation and the city has one of the lowest crime rates in the region. The average value of a single-family home (\$230,000) is well above the county average, making Kingsburg the second most desirable community in Fresno County.

Employment Trends

Approximately 270 business establishments that generate 3,640 jobs are located in Kingsburg.²⁵ The manufacturing sector dominates the local economy by generating more than 1,300 jobs, which amounts to 37 percent of all jobs in Kingsburg. The significant sectors of Kingsburg's economy include:

- Manufacturing – 1,300 jobs
- Accommodations and food services – 500 jobs
- Retail Trade – 470 jobs
- Health Care – 260 jobs

Kingsburg also lost 220 jobs between 2010 and 2014, similar to the loss of jobs in Fowler. Approximately 300 jobs were lost in the professional and technical service sector; agricultural establishments lost 90 jobs and the health care sector lost 80 jobs. The job losses were partially mitigated by an expansion of 120 accommodation and food service jobs, 50 manufacturing jobs and 40 wholesale trade jobs.

Demographic Trends

Approximately 12,100 people live in Kingsburg, and the population is expanding at 2.1 percent annual growth rate, which is faster than the County's 1.9 percent growth rate and well above California's 1.5 percent growth rate. Some key differences between the



Kingsburg Concert in the Park

demographic characteristics of Kingsburg and Fresno County are listed below.

- Caucasians comprise 50 percent of Kingsburg's population, well above the County average.
- Kingsburg has an older population with a median age of 34.7, compared to Fresno County's median age of 31.2.
- Adult residents of Kingsburg have completed significantly higher levels of formal education than the average resident of Fresno County.

²⁵ Source: See Appendix Table A-22

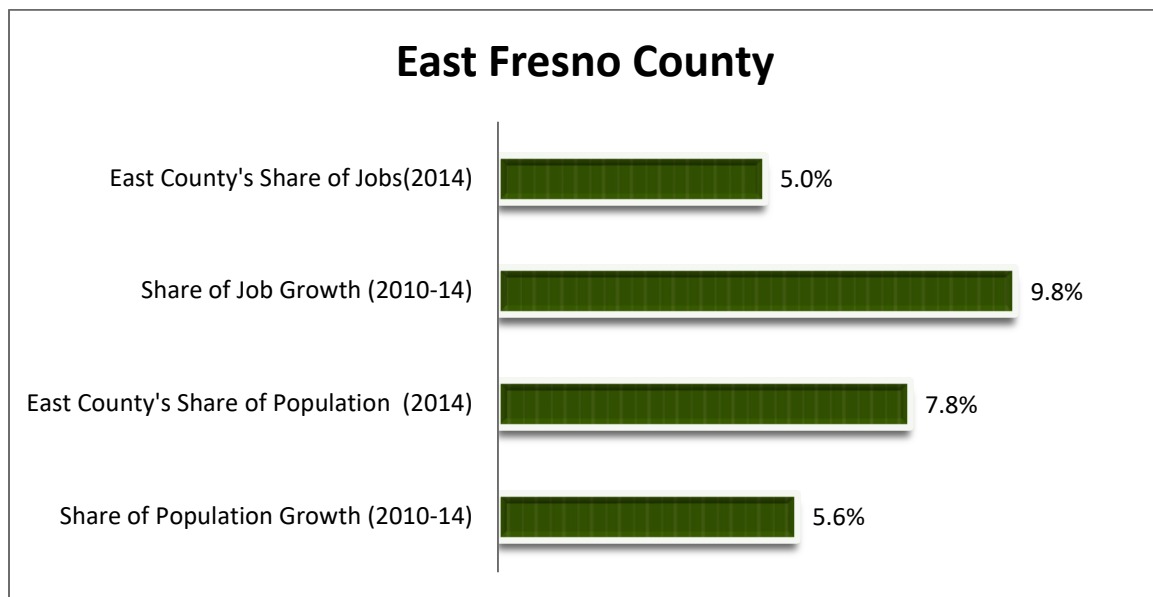
- Kingsburg household incomes are nearly \$80,000, which are significantly higher than the \$65,300 incomes earned by the average Fresno County household.
- Only 30 percent of Kingsburg households earned below \$35,000 per year of household incomes compared to 40 percent of all Fresno County households that earned below \$35,000 per year.
- Fifteen (15) percent of Kingsburg households earn incomes below the federal poverty guidelines and 30 percent of children or youth under 18 years old live in poverty.

5.3 East County

The East County area includes the Cities of Reedley, Sanger, Orange Cove and Parlier where 73,800 people live along with 900 private sector business establishments and approximately 10,800 private sector jobs (2014 data).

Figure 11 below indicates that 7.8 percent of the population and 5.6 percent of the jobs are located in the four East County cities. This data indicates that the East County functions as a minor commute shed to the Cities of Fresno and Clovis since there are more residents and housing units than jobs. However, the balance of jobs and residents is changing with East County capturing 9.8 percent of new jobs created in Fresno County since 2010. Essentially, the region is adding jobs but population growth is slowing down relative to Fresno County.

Figure 11- East Fresno County's Share of County Population and Jobs: 2010 - 2014



City of Reedley

The City of Reedley is a mid-sized community of 26,000 residents that was founded by German Mennonite and Korean immigrants. The city's economic base relies on agricultural production and processing activities that builds up the City's brand as "The World's Fruit Basket." Reedley College, a public community college with more than 14,000 students is an affordable higher education option for local residents. The downtown



Reedley College

offers an attractive mix of commercial businesses. Reedley Beach and Cricket Hollow Park have become regional visitor destinations with their location along the Kings River.

Employment Trends

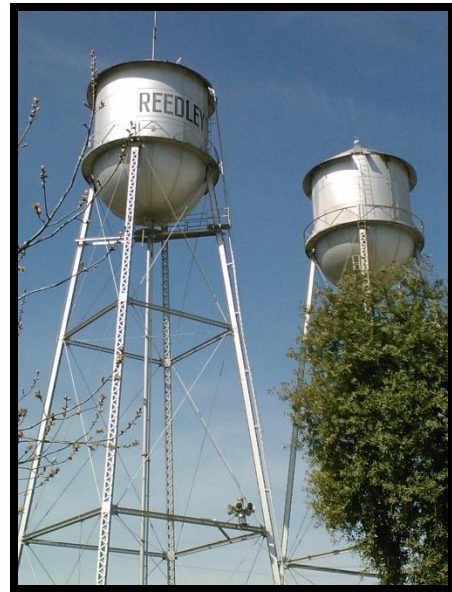
The City of Reedley has 380 business establishments that generate approximately 5,400 jobs.²⁶ Health care generates 1,350 jobs dominating the local economy. The significant sectors of Reedley's economy are listed below:

- Health care – 1,350
- Retail Trade – 680 jobs
- Transportation and Warehousing – 520 jobs
- Accommodation and Food Services – 520 jobs

Reedley added 550 new jobs between 2010 and 2014.

The sectors that experienced the largest gains were:

- Agriculture – 230 jobs
- Accommodations and Food Services – 130 jobs
- Transportation – 110 jobs



Reedley Water Tower

Demographic Trends

Reedley is another medium sized city with 26,000 people, and the city's population is expanding at a 2.2 percent annual growth rate, which is faster than the County's 1.9 percent growth rate and well above

²⁶ Source: See Appendix Table A-23

California's 1.5 percent growth rate. Reedley has numerous demographic characteristics that are similar to the entire County, but some key differences are listed below.

- Reedley is a predominately Latino community with Latinos accounting for 77 percent of all residents.
- Given the large Latino population, approximately 60 percent of Reedley residents speak Spanish as their primary language.
- Reedley's adult residents have completed significantly lower levels of formal education than the average resident of Fresno County. Approximately 37 percent of Reedley adults did not graduate from High School and only 10 percent have graduated from college.
- Relatively low home values of \$175,000 make Reedley an affordable housing option for commuters that work in the Cities of Fresno or Clovis.

City of Sanger

Sanger is another mid-size community of 26,000 residents located approximately 16 miles east of downtown Fresno. The city's economy is historically driven by its location as an agriculture and timber rail shipping point. The two largest employers include Pitman Farms, which is a high-end turkey and chicken processor, and Initiative Foods – a premium baby food product manufacturer. Sanger has also made an effort to diversify the local economy by attracting

precision machining, structural steel and corrugated product manufacturing along with Algonquin Power, a hydrogen power plant that produces power and mulch. The General Plan has designated significant acreage for industrial development south of town. However, water and/or sewer capacity constraints will restrict the type of industries that Sanger's infrastructure can support.

The RDA successor agency owns the Kings River Technology Park that has attracted firms such as Cargill Meat Company (dog treats), American Books and California Truss Frame, which recently expanded from 15 to 130 employees and plans to double its size. Sixty acres of former RDA owned land is still vacant and 40 acres are available to sell.



Sanger Blossom Day Festival

Retailers in Sanger serve a relatively small retail market of customers who can easily travel to big box stores and regional shopping centers located in Fresno and Clovis. Downtown has lost its historic strength as a retail center, but the area still provides for some shopping, banking, governmental services, personal services, school, entertainment and cultural activities.



Historic Downtown Sanger

Employment Trends

The most recent data indicates that Sanger has 220 business establishments that generate approximately 4,600 jobs.²⁷ Nearly 20 percent of Sanger's jobs are retail and another 20 percent are manufacturing jobs. Most residents that are not locally employed commute to the Fresno/Clovis area for work. The most significant sectors of Sanger's economy are listed below:

- Retail Trade – 880 jobs
- Manufacturing – 870 jobs
- Accommodation and Food Services – 580 jobs
- Health Care – 560 jobs

Sanger added more than 1,000 new jobs between 2010 and 2014. The largest employment gains were among the sectors listed below:

- Construction – 240 jobs
- Health Care – 220 jobs
- Retail – 180 jobs, and
- Accommodation and Food Services – 150 jobs



Initiative Foods Job Fair in Sanger

²⁷ Source: See Appendix Table A-24

Demographic Trends

Sanger is a rapidly growing City that is expanding its population at 2.8 percent annual growth rate. Sanger has a number of demographic characteristics that are similar to the entire County, but some key differences are listed below.

- Latinos comprise 82 percent of Sanger's residents and 56 percent of the community's residents speak Spanish as their primary language.
- Adults that live in Sanger have completed significantly lower levels of formal education than the average resident of Fresno County. Approximately 38 percent of Sanger adults did not graduate from High School and only 9 percent have earned a Bachelor's or an advanced degree from a college or a university.
- Sanger households earn relatively low incomes that average \$59,000 per household, which is well below the county's average income of \$65,300 per household.

City of Orange Cove

Orange Cove is a small community of 9,200 people located in the eastern foothills of the Sierra Nevada Mountains within a 45-minute drive east of downtown Fresno. The city has attracted pack-house establishments engaged in distribution and value added activities, and there are shovel ready industrial sites available for manufacturing and distribution establishments.



Park in Orange Cove

Orange Cove's location near the Highway 63 and 180 interchange makes the city a gateway into Kings Canyon National Park. The area enjoys a year-round growing season for hundreds of acres of orange and lemon citrus fruit, and Orange Cove has become a regional destination for the annual spring Orange Blossom Festival which kicks off the agricultural growing season.

Employment Trend

Orange Cove has a very small economy with fewer than 60 business establishments that generate approximately 630 jobs.²⁸ Agricultural establishments comprise the largest sector of the local economy generating 230 jobs, which amounts to 36 percent of all jobs in Orange Cove. The largest job sectors are:

- Agriculture – 230
- Retail trade - 120 jobs
- Health care - 80 jobs



Diane Feinstein Skate Park, Orange Cove

Orange Cove lost 160 jobs between 2010 and 2014, which was entirely caused by the loss of one professional business establishment that employed between 100 and 250 workers.

Demographic Trends

Orange Cove is a slow growth community that has added only 120 new residents since 2010, which translates into a 0.3 annual growth rate. The significant demographic differences between Orange Cove and Fresno County are listed below.

- Latino's comprise 93 percent of Orange Cove's resident and 75 percent of the citizens speak Spanish as their primary language.
- Orange Cove adults have completed significantly lower levels of formal education than the average resident of Fresno County. Approximately 54 percent of Orange Cove adults did not graduate from High School and only 4 percent have earned a Bachelor's degree from a college or a university.
- Orange Cove households earn very low incomes that average only \$39,400 per household.
- Sixty-five (65) percent of households earn less than \$35,000 per year, and 50 percent of residents earn incomes below the federal poverty standards.
- The average single family home is valued at \$121,000, which indicates weak demand to live in Orange Cove.

²⁸ Source: See Appendix Table A-25

City of Parlier

Parlier is a mid-sized community of 15,400 residents located just 8-miles east of US Freeway 99, a 30-minute drive from downtown Fresno, and a 20-minute drive from the Fresno-Yosemite International Airport. The city has significantly expanded the job base since 2010, and its strategic location should continue to attract additional transportation and distribution establishments. Relatively low home values of \$136,800 make Parlier a more affordable location for commuters to the Cities of Fresno and Clovis.



City of Parlier City Hall

Employment Trends

The City has a relatively small economic base with 71 business establishments that generate approximately 1,700 jobs.²⁹ The largest sectors of Parlier's economy include:

- Manufacturing (420 jobs)
- Agricultural support (380 jobs)
- Health care (290 jobs)
- Retail trade (220 jobs)

Parlier's job base grew 37 percent between 2010 and 2014 with the addition of 470 jobs primarily in manufacturing and healthcare. This is a very significant expansion and the city has available industrial and commercial sites to continue the expansion going forward.



Sampling of Parlier Foods

²⁹ Source: See Appendix Table A-26

Demographic Trends

Parlier has added 900 new residents since 2010, and the population is expanding at a healthy 1.5 percent annual growth rate, almost the same rate of growth as all of Fresno County. The significant demographic differences between Parlier and Fresno County are described below.

- Nearly every resident of Parlier is Latino (97 percent) and 84 percent of the citizens speak Spanish as their primary language.
- Adult residents of Parlier have significantly lower levels of formal education completed than the average resident of Fresno County. Fifty-six (56) percent of adults did not graduate from High School and only 4 percent have earned a Bachelor's degree from a college or a university.
- Parlier households earn very low incomes that average only \$45,100 per household.
- Fifty-three (53) percent of households earn less than \$35,000 per year, and 42 percent of residents earn incomes below the federal poverty standards.



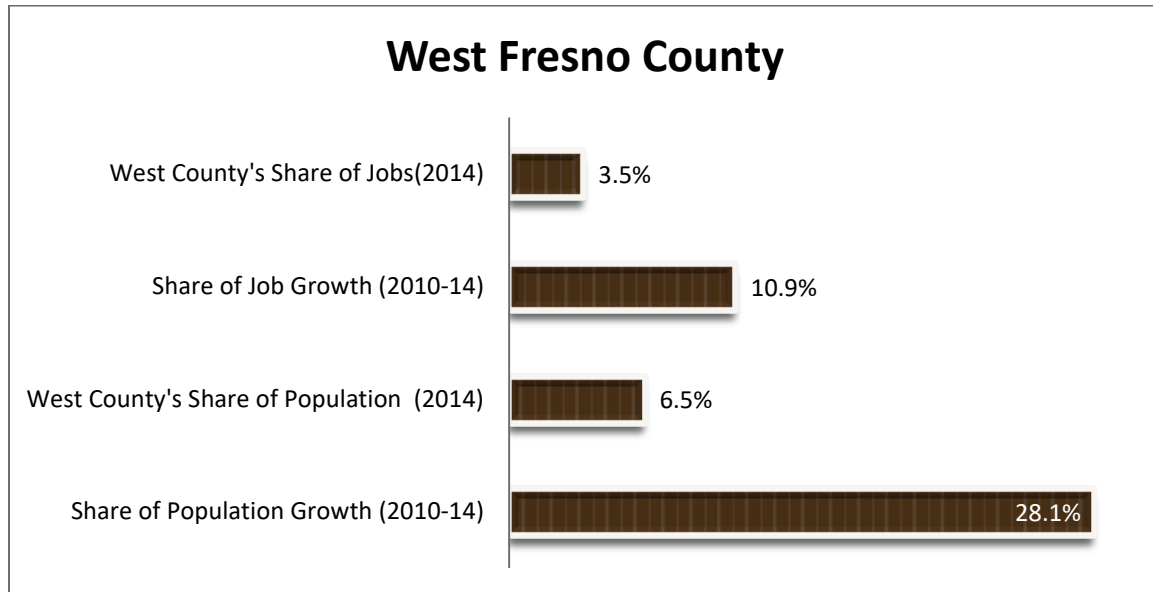
Vaccination Clinic at Earl Ruth Park

5.4 West County

The West County area includes the Cities of San Joaquin, Kerman, Firebaugh, Mendota, Coalinga and Huron where 62,000 people live along with 2,900 private sector business establishments and 8,600 private sector jobs (2014 data). The allocation of people and jobs in the unincorporated areas is unknown.

Figure 12 below indicates a significant imbalance between the number of people that live in the west county cities and the number of jobs available for those residents. Approximately 6.5 percent of Fresno County residents live the six cities, but only 3.5 percent of the jobs are located in the zip codes around those jurisdictions, which indicates that some west county residents must commute long distances to employment centers in the Cities of Fresno and Clovis.

Both population and job growth expanded in the West County cities since 2010, but the imbalance between job creation and new people moving to the area has expanded. The West County cities absorbed 28 percent of the County's new population growth and 10.8 percent of the new jobs created in Fresno County between 2010 and 2014. Essentially, the region is adding both jobs and people, but the pace of job growth is not keeping up with the population growth rates.

Figure 12- West Fresno County City's Share of County Population and Jobs: 2010 - 2014

City of San Joaquin

The City of San Joaquin is Fresno County's smallest city located approximately 30 miles from downtown Fresno. Residents mostly work on farms spread throughout the west part of the valley, where the crop mix is changing from cotton, corn and hay to higher value crops of pistachios, almonds and stone fruit. This has put many agricultural laborers out of work for a while, but the crop switch should provide more year-round employment once the trees have matured.

The city's commercial district is in decline largely because of the small population base, low incomes earned and more convenient, price-competitive shopping options elsewhere. The development of 19 new homes that are under construction and the rehabilitation of the 73 unit Garden Valley apartments should improve the demand for commercial services in San Joaquin.

The dissolution of the Redevelopment Agency left the



San Joaquin Health Center

City in debt. This leaves the City's small revenue base burdened with an annual debt service. The former RDA incurred debt in the 1990's to improve and construct industrial buildings that attracted a garlic processing company, an embroidery firm and a chair manufacturing company. However, the businesses ultimately folded leaving behind an inventory of industrial space that remains vacant today that include:

- A 59,400 square foot warehouse building and a 5,700 square foot recessed loading dock
- An 8,000 square foot corporate office building
- A 10,700 square foot warehouse building and a 2,400 square foot recessed loading dock
- A 107,000 square foot packing and cold storage plant

Employment Trends

San Joaquin has only 29 business establishments that generate approximately 190 jobs.³⁰ The retail trade sector generates 60 jobs and health care creates 40 jobs. However, the local employment base is in decline with 70 jobs lost since 2010.

Demographic Trends

San Joaquin's population has flat lined at 4,000 people with no new people added since 2010. Some of the city's distinctive demographic characteristics are described below.

- Ninety-five (95) percent of San Joaquin residents are Latino and 88 percent of the citizens speak Spanish as their primary language.
- Adult residents have significantly lower levels of formal education completed than the average Fresno County adult. More than 70 percent of San Joaquin adults did not complete high school and only 4 percent have earned a college degree. The low levels of formal education completed constrain efforts to attract employers that require an educated and skilled workforce.
- San Joaquin has the lowest income of any city in Fresno County, with households earning only \$32,000 per year. Moreover, household incomes have been in steady decline since 2000.



San Joaquin Grocery Store

³⁰ Source: See Appendix Table A-27

- Sixty-seven (67) percent of households earn less than \$35,000 per year, and 53 percent of residents earn incomes below the federal poverty standards.

City of Kerman

Kerman is a moderate sized community of 14,400 people that is situated on the west side of Fresno County only 16 miles from downtown Fresno. The City is known for its agricultural fields of almonds and raisins along with two of Fresno County's largest agricultural soils companies and a leading manufacturer of aerial platform lifts.



Aerial View City of Kerman

State Route 180 (Whitesbridge Road) and State Route 145 (Madera Avenue) serve as key transportation corridor connections to Highway 99 and Interstate 5. Kerman has a low crime rate, more than 47-acres of public parks and a school district with a good reputation. Essentially, Kerman is a desirable place to live and one of the most affluent housing markets in West County, with an average price of \$184,000 for a single-family

The City is expanding east and west. A Walmart Supercenter was attracted two years ago, and new housing is being developed for commuters to the Fresno metropolitan area. The wastewater treatment plant has significant capacity to support new growth, but the City relies on ground water, the water quality is problematic, and the City may be required to drill costly deeper wells.

Employment Trends

Kerman has 180 business establishments that generate approximately 2,400 jobs.³¹ The five most significant sectors of Kerman's economy include retail trade (340 jobs), manufacturing (310 jobs), agricultural support (290 jobs), accommodations and food services (290 jobs), and wholesale trade (270 jobs).



Kerman City Hall

³¹ Source: See Appendix Table A-28

Kerman's economy added 840 new jobs between 2010 and 2014, which translates into a 55 percent expansion of the city's job base. The largest growth sectors were:

- Agricultural services (210 new jobs)
- Manufacturing (160 new jobs)
- Wholesale trade (150 new jobs) and
- Administrative support (110 new jobs)

Demographic Trends

Kerman is a moderate growth community that added nearly 860 new residents since 2010 with growth occurring at a 1.5 percent annual growth rate. Some of the city's distinctive demographic characteristics are described below.

- Approximately 76 percent of Kerman's residents are Latino and 60 percent of the citizens speak Spanish as their primary language.
- Only 59 percent of Kerman's adults have complete High School and only 6 percent have earned a college degree.
- Households in Kerman earn only \$57,500 per year, which is significantly higher income than earned in other west county communities, but still lower than the Fresno County average household income of \$65,300.

City of Firebaugh

The City of Firebaugh's 8,200 residents are located along the San Joaquin River and on State Route 33, 18 miles east of Interstate 5 and within a 45-minute drive to downtown Fresno. The area's economy is very dependent upon agriculture and processing. City officials are very positive and forward thinking about their community but are limited by resources and looking for ways to assist business and grow sustainable jobs in their city. To combat water shortages, the City is considering the use of recycled water for agricultural production. Firebaugh also has a General Aviation airport that is used by agribusiness corporations and landowners with farming operations in the West Valley. The airport is limited by one runway and a study about lengthening the airport runway is underway.

Firebaugh's economic development priority is to expand basic water, sewer and other backbone infrastructure services that are needed to attract industrial business and continue to support local Ag and



Firebaugh City Hall

food processors. Tomatek expanded their West Valley tomato production operations and added 300 workers to the processing facility in Firebaugh. The City also attracted a new Dollar Store and a \$44 million West Hills College building. Downtown revitalization is a priority with vacant and underutilized sites needing to be redeveloped with mixed-use buildings that combine commercial and residential uses. Developing more housing in any form is a City priority as Firebaugh suffers from a lack of homes to buy or rent. Apartments have waiting lists and the city is losing housing to Mendota, Dos Palos and Madera.



Community Garden in Firebaugh

Employment Trends

Firebaugh has 90 business establishments that generate approximately 1,400 jobs.³² Manufacturing generates 380 jobs accounting for 27 percent of Firebaugh's job base. Agricultural support (220 jobs), accommodations and food services (210 jobs), and wholesale trade (200 jobs) are the other significant sectors of Firebaugh's economy.

Approximately 480 new jobs were created in Firebaugh between 2010 and 2014, amounting to a 55 percent expansion of Firebaugh's job base. Expanding industries included:

- Agricultural services -190 new jobs
- Accommodations and food services - 100 new jobs
- Manufacturing and Transportation - 60 new jobs each

Of course, it is likely that the local employment setting has continued to change during the past two years.

Demographic Trends

Firebaugh is a strong growth community that added nearly 850 new residents since



Firebaugh Riverwalk

³² Source: See Appendix Table A-29

2010 with growth occurring at 2.1 annual growth rate, well above Fresno County's 1.4 percent annual growth rate and California's 1.3 percent annual growth rate. Some distinctive demographic characteristics of Firebaugh are described below.

- Ninety-one (91) percent of Firebaugh's residents are Latino and 80 percent of the citizens speak Spanish as their primary language.
- The community has a young population with a median age of 35.3 and 37 percent of residents are under 20 years of age.
- Sixty-two (62) percent of Firebaugh's adults have not completed High School and only 5 percent have earned a college degree.
- Incomes amount to only \$45,100 per household, which is significantly less than the Fresno County average of \$65,300 per household.
- Fifty-two (52) percent of Firebaugh households earn less than \$35,000 per year, and 39 percent of residents earn incomes below the federal poverty standards.

City of Mendota

Mendota is a mid-sized community of 11,800 people that is situated at about a 45-minute drive west of downtown Fresno. Mendota is branded as the cantaloupe center of the world with the local population expanding to 16,000 people during harvest season. The community has attracted a large number of immigrants from El Salvador who work hard and contribute to the success of the surrounding farm



Community Park in Mendota

economy. Many farmers are changing from row crops to tree crops, which should create more year-around positions. The City also operates a municipally owned general aviation airport that allows Mendota to serve large landowners and corporate executives who travel to the area to manage their agribusiness operations.

In an effort to diversify the local economy the City supported the recruitment of a federal prison that currently holds nearly 1,000 incarcerated male inmates. The Federal Corrections Institute (FCI) opened in 2010 but the facility employs very few Mendota people and few local businesses obtained contracts to deliver goods or services. However, the prison has expanded the business revenues earned by local restaurants that serve the employees and inmate visitors. In addition, a new Dollar Tree, McDonalds, Auto Zone and other health care services were attracted to Mendota.

The community has 25-acres of land available for a mix of commercial and residential uses. A number of vacant sites have negligent owners not interested in pursuing development. One

wealthy individual has purchased numerous sites with the intention of retaining them as open space green fields or vacant lots. An old biomass plant can be reused and the planned realignment of SR 180 will open up new sites for commercial development.

Employment Trends

Seventy-seven (77) business establishments that operate in Mendota generate 680 jobs.³³ The low paying retail trade sector generates 220 jobs in Mendota, which comprises one-third of the community's job base.

Accommodations and food services generate 130 jobs. Health care and transportation generate 60 jobs each.

Approximately 170 new jobs were created in Mendota between 2010 and 2014, amounting to a 33 percent expansion of Mendota's job base. Retail trade added 60 new jobs, and accommodations and food services added 40 new jobs. Of course, it is likely that the local employment setting has changed during the past two years but current data on zip code based employment is not available.



Veteran's Day in Mendota

Demographic Trends

Mendota is a moderate growth community that added nearly 790 new residents since 2010 with growth occurring at a 1.2 percent annual growth rate, well above Fresno County and California's 0.9 percent annual growth rate. Some distinctive demographic characteristics of Mendota are described below.

- Ninety-eight (98) percent of Mendota's residents are Latino and 85 percent of the citizens speak Spanish as their primary language.
- The community has a young population with a median age of 27.5 and 37 percent of residents are under 20 years of age.
- Sixty-seven (67) percent of Mendota's adults have not completed High School and only 2 percent have earned a college degree.

³³ Source: See Appendix Table A-30

- Incomes of \$34,000 per household are only 38 percent of California's average and 50 percent of Fresno County's average household income.
- In addition, real household incomes have steadily declined by 18 percent since 2000 when inflation adjusted incomes averaged \$41,300.
- Sixty-three percent of households earn less than \$35,000 per year, and half of Mendota's residents live in households with earned incomes below the federal poverty standards.



Park in Mendota

City of Coalinga

The City of Coalinga is a small rural community of 16,700 people located west of Interstate 5 about 60 miles from downtown Fresno. The City has an excellent public school system, a library, a museum, many recreational facilities and a Regional Medical Center. Internationally known oil and gas companies that employ 100's of workers in the nearby oil fields have allowed residents to prosper and earn relatively high household incomes. West Hills College, which provides college level course-work in a variety of disciplines, has its main campus located in Coalinga.

The Pleasant Valley State Prison that was constructed in 1994 houses 2,300 inmates and employs 1,000 people. The Coalinga State Hospital that employs 1,900 workers is a 1,500-bed facility that was built to house sexual predators. The Claremont Custody Center was a third prison built and owned by the City that closed in 2011 but will soon be reused as a cannabis growing facility. Other major employers located in or near Coalinga include:

- Harris Farms and Feeding Company
- Harris Ranch Inn
- Sequoia Packing Company
- Paramount Farms-Coalinga, and



Coalinga Court House

- Granite Construction Company operates the Coalinga Rock and Asphalt Plant
- Coalinga-Huron Unified School District
- Chevron and Aera Oil

Employment Trends

Coalinga has 165 business establishments that generate 2,600 jobs.³⁴ Low paying accommodations, food services and retail trade establishments generate half of the jobs within the Coalinga zip code. The nearby high paying oil fields employ many contract workers that occupy the lodging facilities and spend money at restaurants and retail stores. Other significant sectors of employment within the Coalinga zip code include transportation (260 jobs), agricultural support and health care (240 jobs each).

Coalinga experienced a 21 percent expansion of the job base between 2010 and 2014 with approximately 450 new jobs created. Accommodations and food services added 160 new jobs, and retail trade added 80 new jobs. Of course, it is likely that the local employment setting has changed during the past two years but zip code based data is only available through 2014.

Demographic Trends

Coalinga is a rapidly growing community that added nearly 3,300 new residents since 2010 with growth occurring at a 5.7 percent annual growth rate, well above Fresno County and California's 0.9 percent annual growth rate since 2010. Coalinga's demographic characteristics are very similar to the characteristics of Fresno County's demographics. The main difference is that Coalinga's housing values are only \$145,500, well below



Oilfields Surrounding Coalinga



Frame Park in Coalinga

³⁴ Source: See Appendix Table A-31

Fresno County's housing values of \$192,800.

City of Huron

Huron is a small city of 6,900 residents that is located 3 miles south of State Route 198, a major east-west thoroughfare, and 9 miles east of Interstate 5, approximately 50 miles from Downtown Fresno, 23 miles from Lemoore and 33 miles from Hanford. The community's workforce is primarily engaged in agricultural production work. The town doubles in size during harvest season with permanent and seasonal workers employed by several nearby agricultural production companies such as Harris Ranch, Crop Production Services, Terra Linda Farms, Dole, Fresh Express, and Woolf Enterprises.



City of Huron

According to LAFCO, Huron's infrastructure is sufficient to provide services for current uses. The City applied for and received a \$375,000 CDBG Planning Grant to upgrade the wastewater treatment system and resolve the nitrogen issue so that it can accommodate new business and housing units. However, water and sewer lines must be extended before new users can be attracted to the industrial area.

Employment Trends

Only 54 business establishments operate in Huron creating jobs for 340 workers. Approximately 40 percent of Huron's jobs are in the retail sector. Another 15 percent are in the health care and social services sector. Two food-manufacturing establishments generate 40 jobs. Many residents travel outside city limits to do agricultural work.

Huron experienced a net gain of 40 new jobs between 2010 and 2014. An expansion of retail trade jobs accounted for all the gains.

Demographic Trends

Huron is a very slow growth community adding only 150 new residents between 2010 and 2016. Some distinctive demographic characteristics of the community are described below.

- Ninety-nine (99) percent of Huron's residents are Latino and 94 percent of the citizens speak Spanish as their primary language.



Children in Huron Christmas Parade

- Community residents are very young with a median age of 24.8 and 41 percent of residents are under 20 years of age.
- Seventy-four percent of Huron's adults have not completed High School and no college graduates live in the community.
- Incomes of \$41,400 per household are less than half of the state average. Sixty-three (63) percent of households earn less than \$35,000 per year, and 36 percent of Huron's residents live in households with earned incomes below the federal poverty standards.
- In addition, real household incomes steadily declined by 30 percent since 2000 when inflation adjusted incomes averaged \$57,600.
- Housing values of \$136,300 are well below Fresno County's housing values of \$192,800.



Construction Site in Huron

6. CEDS GOALS AND STRATEGIC INITIATIVES

6.1 Regional Economic Development Goals

Seven regional economic development goals are described below that cut across Fresno County's jurisdictional boundaries. These goals were developed through a process of reviewing existing documents, CEDS Strategy Committee meetings, research findings and stakeholder interviews throughout Fresno County. The regional economic development goals are distinctly different from the economic development goals adopted by individual communities, which are shaped by each jurisdiction's geography, historical economic base, demographic mix and other local factors.



Goal #1: Expand Job Creation

Creating new jobs at a faster rate than population growth is one of the most important regional economic development goals. This goal is being accomplished, with new jobs being created at a 1.7 percent annual growth rate and new population expanding at a 0.9 percent annual growth rate. That said, it is important that this goal continues to be accomplished with Fresno County's large number of young people that will soon enter the workforce along with more than 50,000 agricultural workers that may be affected by long term drought and labor saving automation.

Goal #2: Increase Household Incomes and Wages through Economic Diversification

The wages and incomes earned by Fresno County residents lag significantly behind the State of California due to local historical trends, geographic setting and an industry mix that is highly skewed toward low wage paying jobs. Fresno County's incomes average \$65,300 per household compared to California incomes that average \$89,900 per household. Wages earned follow a similar pattern as Fresno County's private sector jobs paid an average wage of \$35,900 compared to \$56,600 of wages earned per job throughout California.

Goal #3: Improve Educational Attainment and Workforce Training

New labor saving technologies that require an educated and adaptive workforce are being utilized in nearly every sector of the economy. Fresno County lags way behind the State of California with 27 percent of adults not completing High School and only 13 percent that have earned a Bachelor's Degree from a College or University. Employers are increasingly interested in employees that can be trained to a higher skill level meaning that training and education must be expanded to build a base of skills that matches employment opportunities across all ages and skill levels. Efforts should include various school districts and school boards, the Fresno County Office of Education, the Workforce Development Board, four Community College campuses, Fresno State University and others.³⁵

Goal #4: Improve Backbone Infrastructure

A lack of shovel ready industrial and commercial sites throughout Fresno County is a significant constraint on efforts to diversify the economy and attract business establishments that will pay higher wages and salaries. With the exception of a few older industrial areas such as Malaga, it is the policy of Fresno County to guide new business development to the incorporated cities many of which lack adequate water systems infrastructure, wastewater treatment or storm drainage that is needed to relieve certain areas from periodic flooding.

Goal #5: Encourage Sustainable Agricultural Production

Fresno County's traditional water supplies used for agricultural production are under threat from the ongoing drought that will require water conservation technologies and improved ground water management practices to be adopted. The traditional farming practices that generate more than \$7 billion of crop value and nearly 50,000 direct jobs may have to change due to constricted water supplies that rely on groundwater and surface water flow from the Central Valley Project.³⁶

Goal #6: Enhance Fresno County as a Regional Economic Development Hub

Fresno County is the hub for a number of regional economic development initiatives that can enhance agriculture, help attract higher paying jobs and encourage sustainable economic development practices. The Fresno State Office of Community and Economic Development already functions as the regional hub of a multi-county food and beverage manufacturing consortium (IMCP), a regional broadband consortium, and a regional industry clusters initiatives.³⁷ The International Center for Water Technology, formed to target regional solutions,

³⁵ Clovis Community College, Fresno City College, Reedley Community College and West Hills Community College have Fresno County campuses

³⁶ The CVP was established in 1933 to transport water into the Central Valley

³⁷ The Investing in Manufacturing Communities Partnership (IMCP) is funded by EDA



functions as a world-wide leader in education and research on water efficiency with over 200 businesses in the cluster. The Fresno Yosemite International Airport provides air service connections for San Joaquin Valley residents. The planned high speed rail stop in downtown Fresno will significantly improve the connection among Fresno County businesses and residents to Bay Area and southern California markets.

Goal #7: Strengthen Connections between Community Needs and Available Resources

Fresno County has a strong network of available resources to assist various community based economic development initiatives. Established governmental and non-profit organizations with available resources include Fresno Regional Workforce Development Board, the Fresno State Small Business Development Center (SBDC), the Central California iHub, the San Joaquin Valley Rural Development Center, the Fresno Community Development Financial Institution (CDFI) and others. Community knowledge about what these programs can offer in terms of training, financing and technical assistance can be improved.

Regional Economic Development Strategies

The CEDS Strategy Committee meetings, the previous CEDS report and the County General Plan Economic Development Element identified 20 regional strategies and collaborative actions to accomplish the above regional economic development goals (See Figure 13).

Figure 13- Regional Economic Development Goals and Strategies

Economic Development Goals	Strategies to Accomplish Regional Goals
1. Expand Job Creation	<ul style="list-style-type: none"> 1.1 Expand agricultural production and manufacturing by marketing Fresno County as an agricultural brand that is marketed to new global and domestic markets 1.2 Expand identified growth sectors such as: Logistics, Clean Energy, Construction, and Healthcare 1.3 Expand trade and commerce by supporting the expansion of intermodal transportation systems that exports Fresno County goods to national and global markets. 1.4 Expand tourism by supporting efforts to attract more visitors to the High Sierra and foothill areas such as Shaver Lake, Pine Flat, Squaw Valley, Friant-Millerton and other recreational areas 1.5 Expand tourism by enhancing the County's recreational bikeway network and other recreational amenities 1.6 Expand tourism by highlighting Fresno County's historical and cultural resources
2. Increase Household Incomes and Wages	<ul style="list-style-type: none"> 2.1 Support the establishment of a University of California Medical or Health Sciences School in Fresno County 2.2 Support the location of the high-speed rail heavy maintenance and operation facilities within Fresno County.

3. Improve Educational Attainment and Workforce Training	3.1	Ensure that regional workforce training programs address the needs of agricultural producers
	3.2	Ensure that education and training programs address employer's needs for a technically skilled workforce.
	3.3	Encourage collaboration between educational institutions and business to improve workforce readiness
	3.4	Encourage and support programs to prepare the hard-to-serve unemployed for job readiness.
4. Improve Backbone Infrastructure	4.1	Support the pursuit of adequate water supplies for municipal, industrial, and agricultural use.
	4.2	Support public investments in water distribution, wastewater treatment and storm drainage needed to create new shovel industrial sites
	4.3	Improve telecommunications infrastructure throughout Fresno County
5. Encourage Sustainable Agricultural Production	5.1	Encourage conservation and a more efficient utilization of water through cost-effective improvements in infrastructure, technology, water quality, and water reuse.
	5.2	Support agricultural production efforts that shift to higher value and drought resistant crops.
	5.3	Encourage the adoption of agricultural land conservation practices that improves soil productivity
	5.4	Support efforts to encourage agricultural tourism
	5.5	Support the restoration and improvement of the San Joaquin and Kings Rivers for reasons of water quality and as a recreational tourism asset
6. Enhance Fresno County as a Regional Economic Development Hub	6.1	Encourage Fresno Yosemite Airport to improve the level of air passenger and air freight service
7. Strengthen Connections Between Community Needs and Available Resources	7.1	Encourage Fresno County, the cities and the regional agencies to support an equitable allocation of economic development resources and benefits
	7.2	Maximize opportunities for the cities to utilize statewide economic development programs and initiatives (i.e. California Infrastructure Bank, Enhanced Infrastructure Finance District)
	7.3	Support efforts to assist agricultural supply chain, growth industries and other small business to obtain access to financing

6.2 Fresno County Economic Development Goals and Strategic Initiatives

Although Fresno County has been one of the larger agricultural commodity producers in the United States, the County's unemployment rate has remained among the highest in California and the County's average wage levels have been low. To address these chronic problems, Fresno County supports economic development by working with cities, the private sector, and other organizations to create good jobs and bring Fresno County in line with the rest of California in terms of employment rates and wage levels.

Fresno County Economic Development Goals

The 2000 General Plan Economic Development Element describes the County's goals and policies, which are in the process of being updated but not yet available for public review.³⁸ The three economic development goals that drive County policies are summarized below.

- Expand job creation through regional leadership, agricultural productivity, and development of high-value-added processing
- Diversify the economic base by expanding non-agricultural industry clusters and recreation and visitor-serving attractions and accommodations
- Improve labor force preparedness by providing the local workforce with the skills needed to meet business requirements

Figure 14 -Fresno County Economic Development Goals and Strategic Initiatives

COUNTY ECONOMIC DEVELOPMENT GOALS	ECONOMIC DEVELOPMENT STRATEGIES AND POLICIES	ONGOING ECONOMIC DEVELOPMENT INITIATIVES
Expand Job Creation	2000 General Plan Economic Development Element lists policies in support of the ED goals.	<ul style="list-style-type: none"> ▪ Attract the High Speed Rail Heavy Maintenance Facility; ▪ Revitalize the South 41 Industrial Corridor
Diversify the Economy	<ul style="list-style-type: none"> ▪ 8 Economic Development Planning and Management Policies 	<ul style="list-style-type: none"> ▪ Develop a biomass energy production facility in the Sierra Foothills ▪ Implement a groundwater sustainability master plan ▪ Develop infrastructure improvements along the Golden State Corridor
Support Education and Workforce Training	<ul style="list-style-type: none"> ▪ Agricultural Land Productivity Policies ▪ High Value Agricultural Policies ▪ Non-Agriculture Industry Expansion Policies ▪ Recreation and Tourism Expansion Policies ▪ Labor Force Preparedness Policies <p>The Fresno EDC collaborates with the Workforce Development Board, the Agricultural Commission, U.C. Cooperative Extension, finance and small business lenders and the Visitors and Convention Bureau to implement the ED policies</p>	<ul style="list-style-type: none"> ▪ Develop West Side agricultural tourism trail ▪ Improve Water Supply and other Infrastructure at key interchanges along the Interstate 5 Corridor ▪ Support the Expansion of the Water, Energy and Technology (WET) Center Business Incubator Facility ▪ Attract a High Speed Rail University to Fresno County ▪ Develop a New Mandela Training Center in Fresno County ▪ Support Continued Expansion of the Downtown Business Hub (DBH) incubator ▪ Nielsen Food and Transit Center Expansion(Fresno EOC) ▪ School of Unlimited Learning (SOUL) Expansion (Fresno EOC)

³⁸ The General Plan is being updated with a new Economic Development Element that is not yet ready to be incorporated into the CEDS report.

Fresno County Economic Development Policies and Strategy

The County's economic development policies and initiatives are intended to encourage shifts in agricultural production that will maximize employment benefits, promote value-added agriculture industries, and diversify the economy by attracting non-agricultural business establishments. The General Plan Economic Development Element lists the policies described below with implementation lead by the Fresno County Economic Development Corporation (EDC).

Economic Development Planning and Management Policies

The General Plan Economic Development Element identifies 11 policies to guide economic development planning and management efforts that are common to all 15 cities. The Fresno EDC is under contract with the County to deliver economic development services to the unincorporated areas and most of the cities. The EDC functions as Fresno County's lead on business expansion, attraction, retention and other services such supporting high-speed rail and providing business relocation assistance.

Agriculture Land Productivity Policies

Eight policies guide efforts to use land more effectively by engaging in sustainable farming practices. This includes efforts to shift to high value specialty crops that will generate higher wages and longer periods of employment. U.C. Cooperative Extension and the Agricultural Commission lead the efforts to implement more sustainable uses of water, land and farm management practices. The WET Center is a business incubator focused on water efficient technologies for agricultural related businesses.

High Value Added Agriculture Policies

Six County policies guide efforts to strengthen the production of high-valued agriculture by attracting food processing, supporting research, and recognizing the need for innovative regional solutions to delivering adequate infrastructure services. In addition, improvements in the regional transportation systems will support more hauling of raw product into the county and export of finished products to the external world.

Non-Agriculture Industry Expansion Policies

Ten economic development policies guide the County's efforts to expand the non-agricultural industry cluster targets. The Fresno EDC leads this effort in partnership with the Workforce Development Board. The County and the EDC also partner with financial institutions and for-profit and non-profit small business lenders to ensure the availability of capital for non-agricultural businesses.



Recreation and Tourism Expansion Policies

Eleven policies were established to encourage more people to visit the unincorporated areas with attractive natural amenities. County policies promote recreational activities along the San Joaquin and Kings Rivers, and in the Friant-Millerton area, Shaver Lake and Pine Flat. The County also supports the enhancement of recreational and a bikeway network. The Convention and Visitor's Bureau is staffed to lead the tourism effort by promoting visitor destinations.

Labor Force Preparedness Policies

Four policies guide the County's efforts to improve labor force skills and better match workers with the available jobs. County policies urge the improvement of basic K-12 education and community college districts to better match business requirements, and to better prepare the hard-to-serve unemployed for job readiness.

County Economic Development Initiatives³⁹

Fresno County has identified 10 ongoing economic development initiatives that are listed below. Some initiatives will benefit the entire county, while others focus only on county unincorporated areas. Table B-1 (in Appendix B) summarizes each ED initiative, the potential economic impact, ballpark cost estimates and the status of project implementation.

- Attract the High Speed Rail Heavy Maintenance Facility
- Revitalize the South 41 Industrial Corridor
- Develop a biomass energy production facility in the Sierra Foothills
- Implement a groundwater sustainability master plan
- Develop infrastructure improvements along the Golden State Corridor
- Develop West Side agricultural tourism trail
- Improve Water Supply and other Infrastructure at key interchanges along the Interstate 5 Corridor
- Support the Expansion of the Water, Energy and Technology (WET) Center Business Incubator Facility
- Attract a High Speed Rail University to Fresno County
- Develop a New Mandela Training Center in Fresno County

³⁹ See Appendix B, Table B-1 for a summary of Fresno County's economic development initiatives



6.3 Fresno Metropolitan Area Economic Development Goals and Strategic Initiatives

The City of Fresno and the City of Clovis make up the Fresno Metropolitan area and each have separate goals and projects noted below. The City of Fresno's economic development goals and strategic initiatives are incorporated into the City's CEDS report, which is attached as Appendix C. The goals, strategies and economic development projects initiated by the City of Clovis are summarized in Figure 15 and described in the narrative below in more detail.

CLOVIS ECONOMIC DEVELOPMENT GOALS AND STRATEGIC INITIATIVES

Clovis Economic Development Goals

The Clovis 2015 General Plan includes an Economic Development Element that articulates an overarching goal to create a thriving and diverse local economy with a broad and resilient revenue base that will improve the quality of life and maintain Clovis' distinction as one of Fresno County's premier communities. Six economic development goals listed below were included in the City's General Plan Economic Development Element.

- Support business retention and expansion
- Attract private investment to develop new office and industrial employment centers that will create wealth-building opportunities for entrepreneurs and new career opportunities for local residents
- Create a thriving local economy enriched by its connections and linkages to regional assets and to the national and global communication and transportation networks
- Create distinctive commercial destinations, corridors, and centers that provide a wide variety of unique shopping, dining, and entertainment opportunities for residents and visitors
- Transform Clovis into an overnight tourism destination known throughout the western United States
- Encourage a mix of land uses and types of development that will support a fiscally balanced city that can fund public services and enhance the quality of life for the residents
- Expand the institutional capacity to accomplish the economic development goals and realize the community's vision

Figure 15- Clovis Economic Development Goals and Strategic Initiatives

LOCAL ECONOMIC DEVELOPMENT GOALS	STRATEGIC PLAN	ONGOING ECONOMIC DEVELOPMENT INITIATIVES
Support Business Retention and Expansion	2014 Economic Development Strategy identifies the following business attraction targets	<ul style="list-style-type: none"> ▪ Redevelop the Swiss Colony Winery and the adjacent vacant land site
Attract new private	<ul style="list-style-type: none"> ▪ Health and Wellness 	<ul style="list-style-type: none"> ▪ Develop the Golden Triangle Property

investment	▪ Agile Manufacturing	▪ Develop the Centennial Plaza Pads
Create a thriving local economy	▪ Commercial Retail Expansion	▪ Develop the Mixed Use Areas 17 & 18
Create distinctive commercial areas	▪ Commercial Office Development	▪ Complete the full build-out of the Research and Technology Business Park
Transform Clovis into an overnight tourism destination	▪ Information Processing	▪ Expand the Research and Technology Business Park Expansion
Encourage a fiscally sustainable land use mix	▪ Tourism	▪ Revitalize Shaw Avenue
Expand the institutional capacity to accomplish economic development goals	▪ Water Technology	▪ Develop the remaining vacant sites at the City of Clovis Industrial Park
	▪ Workforce Training and Education	▪ Implement Tourism Strategy

Clovis Economic Development Strategy

The 2014 Economic Development Strategy identifies a variety of job creation targets and a working plan to guide implementation initiatives with specific action steps. The business sectors that Clovis seeks to target for expansion are described below in more detail.

Health Care (Health and Wellness)

The City of Clovis has positioned itself as a regional leader in health care services and training. Clovis Community Medical Center, Kaiser Permanente, and a number of specialized clinics continue to grow and, in turn, attract more health care sector establishments. The addition of the California Health Science School adds a new facet to this growing part of the economy.

Targeting the expansion of the health care sector allows Clovis to take advantage of \$5.9 billion in annual hospital-related annual spending in Fresno County, which generates more than 45,000 regional jobs and is one of the largest employers in every community. In addition, hospitals and long-term care facilities provide a wide variety of employment opportunities that generate relatively high wage and salary jobs. The Clovis Community Medical Center’s expansion is by far the most significant project in the region estimated at \$450 million. The California Health Science School for Pharmacy just expanded and there are plans to add five more medical schools.

The health care sector also brings a strong multiplier effect, attracting a diverse range of supporting companies such as specialized medical equipment and device manufacturers, material suppliers and other supply chain businesses that can provide a wide variety of goods and services.

Agile Manufacturing

Clovis will target the attraction of agile manufacturing establishments that take advantage of Fresno County’s dominance of the manufacturing sector within the San Joaquin Valley, and will attract higher wage job opportunities available for City residents. Agile manufacturing is a term applied to an organization that has created the processes, tools, and training required to respond quickly to customer needs and market changes while still controlling costs and quality.

Within this target, Clovis has shown distinct success in Advanced Medical and Electronics. The success of PELCO by Schneider Electric, KW Automotive, NIAACC- Avitech, Whitecom Electronics, and Anlin Windows has proven that Clovis is a good location for agile manufacturing companies. Land is relatively inexpensive, the labor force is robust and the logistics infrastructure is excellent.

The City's newly adopted General Plan supports the expansion of industrial jobs by protecting the industrial land from being rezoned for residential or commercial uses. City policies that support reasonable development impact fees and shovel-ready sites also keep Clovis competitive for the development of new industrial space.

Commercial Retail Expansion

Clovis will encourage retail expansion, which contributes significant sales tax revenues to the City's budget. A strong retail base also enhances Clovis' position as a desirable location for new residents and business prospects. City staff actively engage potential retail investment through direct contact, trade shows and by maintaining very close working relationships with the developers and brokers who concentrate in the retail market.

Historically, Clovis has been a secondary retail market, but this situation has started to change with the completion of Highway 168 that greatly improves access to Clovis and its retail centers. Better transportation combined with a significant increase in market rate housing development has made it possible to attract retail establishments that may have previously considered Clovis a poor retail location. The growth of the Clovis Crossing Center and the renovation of older retail throughout the City is a good indication of this trend.

Commercial Office Development

Clovis will encourage the expansion of new commercial office space for professional services, finance, insurance, real estate and health care establishments seeking 1,000 to 5,000 square feet of space. Appropriate locations have been identified for new office and mixed-use developments along Highway 168, at Herndon and Temperance Avenues. The eastern portion of the Herndon Corridor is an excellent location for medical offices. The Research and Technology Business Park (Temperance, north of Herndon) has land available for larger professional office complex/campus. A professional school focused on post-graduate medical degrees with plans to grow to 2,000 students intends to locate at the Research and Technology Park. The Golden Triangle (SWC of Clovis and Herndon) has plans for garden and mid-rise office development. Peach Avenue, north of Herndon Avenue is designated for office development. Old Town Clovis has space for office development. The Research & Technology Park also has several entrepreneurial private incubator spaces like Cargo Bay, Office Bay and Venture Bay where the idea is to spin-off small to mid-sized companies into their own space.

Information Processing

Information processing, or "back office" is a business expansion target that includes the outsourcing of back office operations by financial services, insurance, health care, government and other large organizations. Back office operations encompass data processing and analysis,

credit checking, database administration and payroll and billing services. Suitable locations for information processing establishments were identified at the Research and Technology Business Park, the Highway 168 corridor, the Golden Triangle (Clovis and Herndon Avenue) and sites west of the Clovis Community Medical Center. The growing medical service and education field in Clovis adds a unique growth factor for this sector.

Tourism

Clovis is in position to attract more tourism due to its location along a major route to the Yosemite, Sequoia and Kings Canyon national parks, and the city is situated among the Fruit, Blossom and Wild Flower trails that attract tourists during their particular seasons.

Clovis also functions as a regional tourism destination with visitors attracted to the quaint antique and specialty shops of Old Town and the many community festivals such as the Clovis Rodeo, Big Hat Days, Clovis Fest, Old Town Farmer's Markets and Antique and Collectable Fairs. Clovis embraces their heritage while encouraging new growth. This is evident in Old Town where several new microbreweries are popping up, like 559 Brewery; and also with the Clovis Winery project where they are renovating a dilapidated site, while keeping some of its unique characteristics, to make way for a new sports field and recreation center.

Water Conservation Technology

Clovis intends to attract firms that utilize water conservation technologies that can capitalize on the region's leadership in producing irrigation for agriculture and turf systems, municipal and rural water and waste systems, and industrial and recreational applications. Businesses like Grandfos Pumps produce water systems components such as valves, filters, pumps, sprinklers, micro-drip systems, fittings, flow meters and backflow equipment. Clovis is committed to water conservation technology research and manufacturing as a regional partner with the WET Center at CSU Fresno. Targets include:

- Turf and landscape irrigation needs of golf courses, parks, street medians, sports fields and entire cities
- Municipal and Rural Water and Waste Systems that includes wells and related pumps, transmission and distribution systems and water treatment equipment and processes for obtaining desired water quality goals
- Industrial Fluid Applications that includes cooling towers, water filter systems, fire protection systems, mining systems, coolant systems and oils along with wastewater distribution and treatment components
- Recreational and Waterscape Applications that includes theme parks, water features at hotels, swimming pools, etc., and their related components such as valves, piping, meters, and other hydraulic infrastructure

Workforce Training and Education

The Economic Development Strategy identifies specific action steps that Clovis will take to provide training and educational opportunities for the local workforce. This includes equipping workers with the skills they need to fill jobs that employers have available today and job

openings in the years to come, and to continue to work on attracting businesses that provide high-quality, high-wage jobs.

Clovis would also like to attract more private and public educational institutions that can capitalize on the City's relatively high quality of life and its desirability as a location for high value, high growth companies and their employees. Recently the City changed its development fee methodology to charge private institutions that provide 4-year degrees and higher the same fees as public institutions, with the hopes of attracting private schools that fill market demand where the public schools do not.

Clovis has already demonstrated that it is an attractive location for a variety of educational institutions including several private schools and colleges. The Clovis-based Institute of Technology (IT) provides training in disciplines ranging from computer technology to culinary arts, the latter directly benefiting the city's efforts in tourism and destination retail. The California Health Sciences University recently announced an expansion to 2,000 students utilizing vacant land in the City's Research and Technology Park.

Clovis Economic Development Initiatives⁴⁰

City of Clovis has 9 ongoing economic development initiatives that are listed below. Information in Appendix B includes a more thorough description of each project, the potential economic impact, ballpark cost estimates and the status of project implementation.

- Redevelop the Swiss Colony Winery and the adjacent 19.5 acre vacant land site (3495 Clovis Avenue)
- Develop the Golden Triangle Property (Southwest corner of Herndon and Clovis Avenues)
- Develop the Centennial Plaza Pads at 355 Pollasky Avenue
- Develop the Mixed Use Areas 17 & 18
- Complete the development and full build-out of the Research and Technology Business Park
- Research and Technology Business Park Expansion (East of R&T Park) and Additional Expansion southeast of HWY 168 at Owens Mountain Parkway
- Revitalization of Shaw Avenue
- Develop the remaining vacant sites at the City of Clovis Industrial Park
- Implement Tourism Strategy

⁴⁰ See Appendix B, Table B-2 for a summary of Clovis economic development initiatives



6.4 South County Economic Development Goals and Strategic Initiatives

The goals, strategies and economic development projects that are initiated by the South County Cities of Fowler, Selma and Kingsburg are summarized in Figure 16 and described in the narrative below in more detail.

Figure 16- South County Economic Development Goals and Strategic Initiatives

FOWLER ECONOMIC DEVELOPMENT GOALS	FOWLER STRATEGIC PLAN	FOWLER'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
Establish and implement an overall economic development strategy	The 2025 General Plan functions as the City's Economic Development Strategy, which identifies the strategic priorities that are described in the CEDS report text	<ul style="list-style-type: none"> Build out the Three Crowns Industrial Park Attract new commercial and residential real estate investment Attract an Adventist Health/ Valley Children's Hospital clinic Provide infrastructure to 17 acres of commercial property. Annex and provide services to new Industrial lands
Invest in necessary infrastructure and beautification	<u>Possible Business Expansion and Attraction Targets</u>	
Support business expansion, attraction and new business start-ups efforts	<ul style="list-style-type: none"> Large employers that are not large water users. Packaging and Packers of Agricultural Products. Assembly of other various manufactured products such as "Ditch Witch" that is already located in Fowler. Metal fabricators that can capitalize on two major steel building manufacturers already located in Fowler Health Care and Services 	
Implement a community-marketing program for business attraction		
Establish a community-based organization that can help plan and implement economic development initiatives.		
SELMA ECONOMIC DEVELOPMENT GOALS	SELMA STRATEGIC PLAN	SELMA'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
Attract more regional serving retail centers that will expand and strengthen the City's tax base.	In recent years Selma has prepared two economic development strategies or studies that guide the City's initiatives. Strategic actions that will guide Selma's initiatives are listed below	<ul style="list-style-type: none"> Selma Crossing Commercial Center Selma Grove Shopping Center Attract commercial establishments to available infill opportunity sites Golden State Corridor Economic Development Infrastructure Improvements Dinuba Avenue Sewer Improvements Amberwood Master Plan Development
Revitalize and add vitality to the Central Business District	<ul style="list-style-type: none"> Develop two new regional serving shopping centers that will require land annexations and infrastructure improvements Attract new commercial retail establishments to 8 possible infill sites Work with Caltrans to develop a new interchange north of Dinuba Avenue and to improve Dinuba Avenue Study the potential to construct a Highway 43 bypass that will reduce traffic congestion Attract investment to develop available industrial land located along the Highway 99 Corridor and at the Selma Industrial Park 	

KINGSBURG ECONOMIC DEVELOPMENT GOALS	KINGSBURG STRATEGIC PLAN	KINGSBURG'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
Attract new business	Kingsburg has targeted future growth to expand both north and west with several economic development strategies listed below <ul style="list-style-type: none"> Revitalize the Downtown Corridor Attract more Destination Dining and Entertainment Develop a 40 acre sports complex Establish More Special Events & Revitalize Historic Attractions Build Out Kingsburg Business Park, which has more than 40 acres of shovel ready industrial and business park sites with Highway 99 visibility Attract Agriculture Technology Cluster to Locate Along the Golden State Blvd Attract more Health Service Establishments 	<ul style="list-style-type: none"> Build out Kingsburg Business Park Fund Façade Improvements Downtown Attract new and assist the expansion of Light Industrial Business Develop and promote Agri-tourism District Rehabilitate Downtown Historical Buildings Secure Land and Develop Regional Sports Complex
Retain and help existing businesses to expand		

FOWLER ECONOMIC DEVELOPMENT GOALS AND STRATEGIC INITIATIVES

Fowler Economic Development Goals

The 2025 General Plan includes an Economic Development Element with goals and policies that the City should pursue. The City's capacity to implement economic development initiatives, however, is constrained by its small staff and a business community with only 130 establishments. The goals listed below guide the City's economic development efforts:

- Establish and implement an overall economic development strategy
- Invest in necessary infrastructure and beautification to ensure that economic development initiatives are successful
- Support programs and provide resources to strengthen and expand existing business enterprises and encourage new business start-ups
- Implement a community-marketing program and actively pursue the attraction of new commercial and industrial businesses
- Establish a community-based organization that can help plan and implement economic development initiatives

Fowler Economic Development Strategy

The Local Government Commission prepared a downtown revitalization plan for the City of Fowler released in December 2007. The advisory only plan used the charrette process to obtain community input about pedestrian safety, streetscape, urban design and economic development improvements. Priority improvement projects were identified; while many proposals remain under study, others, such as the realignment of southbound Golden State Boulevard to the 8th Street alignment through the City, have been incorporated into official plans of the City and Fresno County.

In addition, Fowler has been awarded more than two million dollars in economic development grants from the State of California's Community Development Block Grant (CDBG) Program during the past few years. With the aid of these funds, the City has implemented a "Revolving Business Loan Program" for local business development and expansion projects.

A menu of policies and standards listed below that were integrated into the 2025 General Plan function as the City's economic development strategy. Several of the policies and standards are being implemented, while others have yet to be initiated.

- Community services, cultural activities, retail stores and offices should be attracted downtown
- The City's main shopping/commercial location should be located along the Merced Street corridor between Highway 99 and the downtown
- A targeting analysis should be completed to determine the types of businesses appropriate to Fowler's commercial and industrial areas
- An inventory of land with a variety of locations should be reserved to avoid creating a monopoly on the land market
- Establish a business incentive programs that may include fast track development, deferral or waiver of fees, reimbursement of costs for improvements, and loans and grants for improvements
- Seek resources to fund physical improvements of existing buildings, roads and other infrastructure, in particular the Merced Street corridor and the downtown area
- Create a property database and contact program, to identify the status of sites in critical commercial and industrial locations and to clarify the willingness and ability of owners to participate in development plans
- Pursue the signage improvement along Highway 99 and the main arteries passing through Fowler
- Create benchmarks that can measure economic development outcomes such as Annual community projects and events, community marketing activities and business recruitment initiatives
- Actively work with the Five Cities Economic Development Joint Powers Authority to develop a marketing plan to recruit targeted businesses and industries
- Designate one key staff person to be the primary contact person for all economic development activities
- Form an advisory economic development committee to be made up of residents, business owners and members of institutions within the community
- Establish a process to work with landowners and business owners and encourage their participation in implementing economic development goals and policies.

Possible Business Attraction and Expansion Targets

Interviews with City Staff indicated that the business attraction targets listed below would be welcome and will match Fowler's economic development needs:

- Large employers that are not large water users
- Packaging and Packers of Agricultural Products - Fowler is already home to Bee Sweet, National Raisin, Simonian's, and Mid-Valley Packaging and Supply
- Assembly of other various manufactured products - It would be ideal to attract other companies like "Ditch Witch" in Fowler
- Metal fabricators - Attract more companies like Gee Manufacturing, a precision manufacturer of steel, that can capitalize on major steel building manufacturers already located in Fowler including Borga Steel Buildings and Golden State Steel
- Health Care and Services - This is a great industry to enhance and already growing with the 17-acre planned Fowler Pediatric Care Medical Plaza - a regional campus for Valley Children's Hospital and Adventist Health that includes an initial 50,000 square foot clinic and medical office complex

Fowler Economic Development Initiatives⁴¹

Five ongoing economic development initiatives identified by the City are listed below. Information in Appendix B includes a more thorough description of each project, the potential economic impact, ballpark cost estimates and the status of project implementation.

- Build out the Three Crowns Industrial Park
- Attract new commercial and residential real estate investment
- Attract an Adventist Health/ Valley Children's Hospital clinic to Fowler
- Provide infrastructure to 17 acres of commercial property
- Annex and provide services to new industrial lands currently in the unincorporated county

SELMA ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Selma's Economic Development Goals

Selma's primary economic development goal is to attract more regional serving retail centers that will expand and strengthen the City's tax base. The City's land use policies emphasize the revitalization of the Central Business District anchored by the Selma Arts Center, which has added to the vitality of the downtown area.

Selma's Economic Development Strategy

Two written economic development studies provide guidance on Selma's economic development strategies, which are summarized below.

⁴¹ See Appendix B, Table B-3 for a summary of Fowler's economic development initiatives

Commercial Development

The City strongly supports the development of new shopping centers and the attraction of corporate retail tenants in order to expand the retail sales tax base. A new retail study identified specific attraction targets and eight opportunity infill areas that could be developed without lengthy efforts to annex and extend infrastructure services to new sites located outside the City limits.

New Interchange, Interchange Upgrades, Overpasses and Highway Realignment

The City of Selma is working with Caltrans to develop a new interchange just north of Dinuba Avenue, and to reconfigure and widen Dinuba Avenue. The City and Caltrans are also engaged in: the realignment of Highland Avenue (SR 43) that connects to the new interchange at Dinuba and SR 99, in efforts to upgrade the interchange at SR 99 and Mtn. View Avenue; and in the construction of a new Highway 99 overpass over Dinuba Avenue that will reduce traffic congestion on Manning Avenue and other major arterials that connect with Highway 99.

Highway 43 Bypass

The City and Caltrans are studying the potential to construct a Highway 43 bypass that will reduce traffic congestion at Highland/Floral Avenues that comes from Highway 43. A feasibility study will evaluate whether bypassing this highway west of Selma would reduce pollution and traffic congestion on Highway 43.

Industrial Development

More than 400 acres of land designated for industrial uses are primarily located along the Highway 99 corridor and by the airport runway. A Foreign Trade Zone designation offers incentives that may be attractive to certain industrial establishments.

The Selma Industrial Park has shovel ready land of various sizes available for purchase, or build to suit. The Golden State Industrial Park has 350,000 square feet of industrial and office space under roof on 30 acres that is immediately available for purchase or lease. The site contains 20,000 Class 1 office space, manufacturing buildings, a wet painting system and a dry-coating paint system. The businesses presently located in the Complex employ 100 people, with new businesses being added.

Selma's Economic Development Initiatives and Projects⁴²

In addition to a Small Business Support Center that was established to offer business counseling, training workshops and technical assistance, Selma's ongoing economic development initiatives listed below are focused on commercial development and public infrastructure improvements.⁴³

⁴² See Appendix B, Table B-4 for a summary of Selma's economic development initiatives

⁴³ See Appendix B for a more thorough description of each project, the potential economic
(Footnote continued)

- Develop the Selma Crossing Commercial Center Project - a 287-acre site that would add more than 3 million square feet of new business space (This project has an approved plan and EIR, with annexation in process)
- Develop the Selma Grove Shopping Center - an 80-acre site that would add more than one million square feet of commercial space. (The proposed project has an approved EIR, but still needs to be annexed into the City)
- Develop Other Commercial Infill Opportunity Sites as identified in the Kosmont report
- Improve infrastructure along Old Highway 99 in order to make Selma's portion of the Golden State Corridor more commercial business establishments
- Complete the Dinuba Avenue Sewer Project in order to support growth in north Selma
- Develop the Amberwood Master Plan area with a proposed 2,560 housing units and 130,000 square feet of commercial space on a 100-acre site

KINGSBURG ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Kingsburg's Economic Development Goals

Kingsburg's primary economic development goal is to attract new businesses, while aiding in the expansion and retention of existing businesses.

Kingsburg's Economic Development Strategy

The City has targeted future growth to expand both north and west. Several specific economic development strategies are summarized below

Revitalize the Downtown Corridor

The downtown area enjoys full occupancy nearly 100% of the time. The city offers what has turned out to be a popular Façade and Alley Program to existing businesses and property owners to receive matching funds to update their exteriors. City Staff is currently looking into partnering with downtown property owners to renovate second-story space for residential living. The recently developed Marion Villas apartments located in downtown was 100% occupied on the day of opening, indicating there is a demand for residential space in the downtown corridor.

Attract more Destination Dining and Entertainment

Kingsburg has 32 locally owned restaurants. Five additional restaurants are scheduled to open within the next year and two new entertainment venues are in the works. The strategy to entice

impact, ballpark cost estimates and the status of project implementation.



travelers and tourists to Kingsburg has proven successful. Expanding on this strategy, the city is now home to a wine room and Ramos Torres Winery. There is also a focus on agricultural tourism at several rural locations surrounding the city.

Develop a Sports Complex

Planning is underway for a 40-acre sports complex that will expand the number of visitors coming to Kingsburg. Three potential locations have been identified, a pro-forma financial analysis was completed and several funding resources identified.

Establish More Special Events & Revitalize Historic Attractions

Special events such as car shows, concerts in the park, Swedish Festival, Julgransfest celebration, Santa Lucia Celebration and Light Parade, and the Harvest Jazz Festival build on the popularity of visiting Kingsburg. Additional attractions include a newly rehabilitated Union Pacific train depot that has been transformed to 1923 featuring a living museum, a fully restored original jail and several historic structures from various time periods at the Kingsburg Historical Park.

Build Out Kingsburg Business Park

The business park includes more than 40 acres of shovel ready industrial and business park sites with freeway visibility located right on Highway 99. Zoning ranges from light industrial to highway commercial, depending on location of the parcel. Focused marketing efforts have proven successful with two new businesses scheduled to move into the park within the next 12 months. The City has created a website to promote the park at www.kingsburgbusinesspark.com.

Attract Agriculture Technology Cluster to Locate Along the Golden State Boulevard

The newly annexed Golden State Blvd has huge potential with shovel ready sites available within two business parks and other available commercial parcels with Highway 99 visibility. The city is looking to strengthen its agricultural industry and technology cluster.

Attract more Health Service Establishments

Kingsburg is looking for additional medical businesses to move into the area building on the successful attraction of the Valley Health Team, the Adventist Health clinic, and additional medical facilities looking to come into the area.

Business Incentives

Business incentives offered to accomplish the business attraction strategies are listed below:

- A streamlined 21 day administrative approval permitting process
- A 25% reduction in the City's Capital Facilities (impact) Fees
- A 50% rebate of the City's real property taxes for three years
- A 50% rebate of the City's sales taxes for three years
- Reduction of impact fees further than 25% to encourage new development and expand the job base

- Provide matching funds for the improvement of facades on downtown buildings and alleyways

Kingsburg's Economic Development Initiatives and Projects⁴⁴

The City recently completed the annexation of land near Golden State Boulevard and Mountain View Avenue. A large portion of land in the annexation area includes Sun Maid, Guardian Industries and Vie Del Grape processing plant. The City contributed \$250,000 to the infrastructure improvement costs, which facilitated business expansion and added to the job base. Ongoing economic development initiatives that are focused on commercial development and public infrastructure improvements are listed below.

- Build out Kingsburg Business Park
- Fund Façade Improvements Downtown
- Attract new and assist the expansion of Light Industrial Business
- Develop and promote Agricultural Tourism District
- Rehabilitate Downtown Historical Buildings
- Secure Land and Develop Regional Sports Complex

6.5 East County Economic Development Goals and Strategic Initiatives

Figure 17 summarizes the goals, strategies and economic development projects initiated by the East County Cities of Reedley, Sanger, Orange Cove and Parlier. A more detailed description of East County's local economic development initiatives are described in the narrative below.

Figure 17- East County Economic Development Goals and Strategic Initiatives

REEDLEY ECONOMIC DEVELOPMENT GOALS	REEDLEY STRATEGIC PLAN	REEDLEY'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
Encourage a diversified job base.	The 2013 General Plan Land Use Element lists policies that shape Reedley's economic development strategic priorities, which are listed below. <ul style="list-style-type: none"> ▪ Ensure the availability of sites and buildings that can accommodate new business prospects, and monitor land inventory changes as they occur ▪ Identify key industry attraction and retention targets ▪ Pursue funding to engage in proactive business recruitment ▪ Identify infrastructure improvements needed to support future growth and 	<ul style="list-style-type: none"> ▪ Prepare Reedley Downtown Plan ▪ Develop the Central Valley Transportation Center
Recruit retail and industrial establishments that meet the needs of community residents.		
Support business expansion and retention		
Maintain an adequate supply of commercial,		

⁴⁴ See Appendix B, Table B-5 for a summary of Kingsburg's economic development initiatives

office and industrial land

Create an image or a City brand that will attract new residents, businesses and economic activity.

- downtown revitalization
- Ensure that the City government has sufficient capacity to adequately respond to new business prospects
- Ensure an adequate housing supply needed to accommodate new business growth
- Attract more education and training opportunities for local residents and business owners, which may include satellite campus of larger institutions.
- Promote locally owned and cooperative enterprises and businesses in Reedley
- Prepare a comprehensive assessment of Reedley's economic statistics including types of existing businesses, labor force evaluation and assets
- Work with large employers to identify the training and education needs of their businesses
- Work with the school district and Reedley College to establish programs that will enhance workforce skills
- The City offers a 25 percent reduction of development impact fees for new development within the Civic Center boundary

SANGER ECONOMIC DEVELOPMENT GOALS	SANGER STRATEGIC PLAN	SANGER'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
<p>The General Plan Economic Development Element identifies five goals the city should pursue.</p> <ul style="list-style-type: none"> ▪ Adopt and implement an economic development strategic plan ▪ Target and attract industries that provide year round jobs ▪ Attract more commercial services so that residents can find the goods and services they need within the local area ▪ Strengthen the downtown business district ▪ Promote Sanger as a destination for new residents and business establishments 	<p>The Sanger economic development strategic actions described in the 2025 General Plan are listed below</p> <ul style="list-style-type: none"> ▪ Prepare an annual economic development plan ▪ Continue to participate in the Five Cities JPA ▪ Collaborate with the regional education and training providers to promote workforce training opportunities ▪ Recruit firms engaged in agricultural technology research, field-testing and new product manufacturing ▪ Offer business incentives as a job creation tool ▪ Ensure that the City's public facilities and infrastructure systems match current industrial requirements ▪ Establish and maintain a close relationship with University of California Agricultural Research Facilities, the USDA Agriculture Research Service, and other agricultural organizations ▪ Identify fiber optic and telecommunication deficiencies at the Kings River Technology Park and implement a beautification program ▪ Encourage existing retail to expand and recruit under-represented retail store types downtown 	<ul style="list-style-type: none"> ▪ Industrial Wastewater Treatment Line Extension that will allow the City to open up new industrial lands ▪ Install a one million gallon water storage tank to improve service and enable annexation of new land north of the current city limits

- Prepare and implement a downtown streetscape master plan
- Upgrade downtown infrastructure and fund streetscape improvements
- Beautify and maintain public spaces
- Encourage murals and other public art
- Strengthen the downtown façade improvement program
- Promote local events and expand tourism promotion

ORANGE COVE ECONOMIC DEVELOPMENT GOALS	ORANGE COVE STRATEGIC PLAN	ORANGE COVE'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
Orange Cove should develop and implement activities that will stimulate business startups, facilitate the expansion of existing businesses, and encourage the location of new businesses that will create new jobs and enhance the quality of life for local residents	<ul style="list-style-type: none"> ▪ Collaborate with all factions of the community to discuss the economic development goals and implementation actions ▪ Recruit manufacturing, alternative energy and health and wellness establishments ▪ Attract More Commercial Establishments ▪ Attract more visitors to Orange Cove ▪ Other infrastructure improvements including expanding the Wastewater Treatment Plant additional filtration and storage improvements for Water Plant 	<ul style="list-style-type: none"> ▪ Infrastructure Improvements for New Orange Cove Shopping Center ▪ Off-site public improvements to Attract an Industrial Manufacturer ▪ Attract Solar Farms
PARLIER ECONOMIC DEVELOPMENT GOALS	PARLIER STRATEGIC PLAN	PARLIER'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
Parlier's primary goal is to create an economic development vision and a sense of place, with clearly stated goals and priorities	<p>Parlier's economic development strategic priorities are listed below.</p> <ul style="list-style-type: none"> ▪ Downtown Revitalization ▪ Businesses Retention and Expansion ▪ Business Recruitment ▪ Build-Out the Industrial Park ▪ Recruit a Hotel 	<ul style="list-style-type: none"> ▪ Upgrade the Wastewater Treatment Plant ▪ Establish a new Business Incubator and Training Center ▪ Fund water and sewer improvements needed to support the Phase 2 development of the Parlier Industrial Park ▪ Extend utilities to 31 acre property as a commercial site

REEDLEY ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Reedley's Economic Development Goals

Reedley's 2030 General Plan Land Use Element describes the City's Economic Development Goals that are listed below.

- Provide economic stability with a diversified job base
- Recruit retail and industrial establishments that meet the needs of community residents
- Retain, improve and support the expansion of existing business establishments
- Maintain an adequate supply of land available for commercial, office and industrial uses

- Create an image or a City brand that will attract new residents, businesses and economic activity

Reedley's Economic Development Strategy

The City is moving forward on economic development goals through partnerships with the Chamber of Commerce, the Fresno EDC and the Five Cities Joint Powers Authority (JPA). The 2013 General Plan Land Use Element lists policies that shape Reedley's economic development strategic priorities. Their priorities are to:

- Ensure the availability of sites and buildings that can accommodate new business prospects, and monitor land inventory changes as they occur
- Identify key business attraction and retention targets
- Pursue funding to engage in proactive business recruitment
- Identify infrastructure improvements needed to support future growth and downtown revitalization
- Ensure that the City government has sufficient capacity to adequately respond to new business prospects
- Ensure an adequate housing supply needed to accommodate new business growth
- Attract more education and training opportunities for local residents and business owners, which may include satellite campuses of larger institutions
- Promote locally owned and cooperative enterprises and businesses in Reedley
- Prepare a comprehensive assessment of Reedley's economic statistics including types of existing businesses, labor force evaluation and assets
- Work with large employers to identify the training and education needs of their businesses
- Work with the school district and Reedley College to establish programs that will enhance the workforce skills of the community

Business Incentives

The City offers a 25 percent reduction of development impact fees within the Civic Center boundary as an incentive to encourage new development. Development impact fees can also be deferred by 80 percent applicable to industrial, commercial, professional, residential or institutional projects, depending on the specifics of the proposed project.

Other Community Improvements

Reedley has initiated additional community improvements that will improve infrastructure systems and provide additional amenities for local residents. These improvement projects are described below:

- Reed Avenue reconstruction between I Street and West Aspen Drive that includes a roundabout and signal synchronization that will make traffic move efficiently

- Reedley Sports Park (Phase II) that will include additional sports fields, walking paths and other public infrastructure
- Reed/Floral Avenue Pond Basin Project that will include a new groundwater recharge facility needed to support more business activity
- A New 15,000 square foot Regional Library Project
- Reedley Parkway Solar Lighting Project
- Cricket Hollow Beach Park Master Facilities Plan

Reedley's Economic Development Initiatives and Projects⁴⁵

The City of Reedley has identified two ongoing economic development initiatives as priority projects.

- A downtown revitalization plan will be prepared that identifies improvements that will calm traffic and identify other streetscape and urban design improvements
- The Central Valley Transportation Center will be a vehicle and maintenance joint-use facility for the City of Reedley and the Kings Canyon School District. The Joint Center will also train mechanics in new green technologies and the alternative energy fuels that will be used at the new facility

SANGER ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Sanger's Economic Development Goals

The City is in the process of preparing a General Plan update that should be adopted in 2017. For now, the 2025 General Plan is the guiding document, which includes an Economic Development Element with a list of economic development goals that the City should pursue.

- Adopt and implement an economic development strategic plan
- Target and attract industries that provide year round jobs
- Become a full-service city so that residents can find the goods and services they need within the local area
- Strengthen the economic viability of Sanger, especially the downtown business district
- Promote Sanger as a destination

Sanger's Economic Development Strategy

The City's operating economic development strategy incorporated into the 2025 General Plan is summarized below.

⁴⁵ See Appendix B, Table B-6 for a summary of Reedley's economic development initiatives



- Prepare an annual economic development plan that includes a budget, calendar and designated responsibilities
- Continue to participate in the Five Cities JPA in partnership with the Fresno County EDC and the Cities of Fowler, Selma, Reedley, Parlier and Kingsburg
- Collaborate with the Workforce Investment Board, Reedley College, Fresno City College and the Sanger Unified School District to promote workforce-training opportunities
- Recruit firms engaged in agricultural technology research, field-testing and new product manufacturing
- Offer business incentives as a job creation tool
- Ensure the City's public facilities and infrastructure systems match current industrial requirements
- Establish and maintain a close relationship with University of California Agricultural Research Facilities, the USDA Agriculture Research Service, and other agricultural organizations
- Identify fiber optic and telecommunication deficiencies at the Kings River Technology Park and implement a beautification program
- Encourage existing retail to expand and recruit under-represented retail store types downtown
- Prepare and implement a downtown streetscape master plan
- Upgrade downtown infrastructure and fund streetscape improvements
- Beautify and maintain public spaces. Encourage murals and other public art
- Strengthen the downtown façade improvement program
- Promote local events and expand tourism promotion

Sanger's Economic Development Initiatives and Projects⁴⁶

Sanger's ongoing economic development initiatives are focused on expanding the City's ability to supply water, and to expand the capacity to deliver wastewater treatment. Two priority economic development projects are described below.

- Install an industrial size wastewater treatment line from its current location in North Avenue to more than 150 acres of industrially zoned land to the south. The line will serve new industries as far as Central Avenue to the south, Academy Avenue to the West and Newmark Avenue to the east.
- Install a new one million gallon water storage tank on the City's north side to improve service to existing users and enable annexation and development of new territories in the City's northern sphere of influence.

⁴⁶ See Appendix B, Table B-7 for a summary of Sanger's economic development initiatives

ORANGE COVE ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Orange Cove Economic Development Goals

Fresno State University worked with an advisory committee of Orange Cove stakeholders in 2014 to prepare an economic development strategy that establishes a strong foundation of collaboration, cooperation and support from all sectors of the community working for a common mission. The strategy document included the mission statement that stated:

“Orange Cove should develop and implement policies, programs and activities that will stimulate business startups, facilitate the expansion of existing businesses, and encourage the location of new businesses in order to create new jobs, expand the City of Orange Cove’s economic base and enhance the quality of life for the citizens of Orange Cove.”

Orange Cove’s Economic Development Strategy

The economic development strategy identified key areas of focus described below.

Collaborate with all factions of the community to discuss the economic development goals and implementation actions

- Partner with Orange Cove Chamber of Commerce, Orange Cove Service Clubs, Kings Canyon Unified School District, and other community groups to initiate efforts for on-going collaboration of community events and activities
- Provide customer service training for all staff that interacts with the public
- Partner with Kings Canyon School District, Reedley College, Fresno Regional Workforce Investment Board to address skill gaps and workforce needs of area businesses

Recruit manufacturing, alternative energy and health and wellness establishments

- Manufacturing with a focus on value added agriculture and food processing. The opportunities to add value to the agricultural production chain are substantial, and agricultural production that utilizes more advanced technologies could create new jobs with significantly higher wages. Orange Cove should consider ways to attract value added agricultural establishments and entrepreneurs looking for business startup opportunities.
- Alternative Energy - Orange Cove has abundant year-round sunshine, an isolated location, and good access to the power grid. The farm should be considered as a resource not just for food and produce but for the ever-growing alternative energy field. Opportunities to produce energy from solar farms, other solar energy facilities, agricultural waste and bio fuels should be considered a potential economic development opportunity.
- Health and wellness - Orange Cove should collaborate with regional health care facilities to ensure that residents are afforded health and wellness services. Orange Cove cannot

play a large role in influencing decision makers on locating health facilities in town; but they can work to get clinics and pharmacies that fit the town's immediate needs.

Improve Public Infrastructure

Orange Cove should stay in contact with the Fresno EDC about the activities and opportunities to improve infrastructure services.

Attract More Commercial Retail Establishments

Many residents of Orange Cove shop in Reedley, Dinuba, and other more concentrated retail centers. The City has a shortage of housing stock, disposable income and the private sector is small and not well organized. There are no major anchor stores and land for their development is scarce. The city should concentrate on providing basic retail services and establish a downtown district. This will allow the community to build a good foundation that it can grow on. Groceries, pharmacies, other basic services should be given highest consideration for city assistance, if possible. Key areas of focus are listed below.

- Market Orange Cove to retailers
- Develop the Downtown
- Provide education and training programs for local business
- Encourage business start-ups taking advantage of local agriculture

Attract More Visitors to Orange Cove

- Maintain close communications with the Fresno-Clovis Convention & Visitors Bureau to promote Orange Cove events and activities to tourists
- Develop a partnership with National Parks and local public/private campgrounds
- Develop a strategy for tourism signage to draw passersby to Orange Cove
- Identify and market land in the city for hotels and/or campgrounds where visitors can stay in Orange Cove
- Take advantage of Orange Cove's agricultural roots by developing and marketing agricultural tours
- Encourage local businesses to develop a plan to attract passing tour buses to stop and purchase gasoline, food and drinks (rest stop)
- Collaborate with community groups to develop strong community events
- Promote BMX/Skate Park
- Investigate the potential for developing land just east of Friant Kern Canal, including possibility of annexing land beyond Fresno/Tulare county line

Community Infrastructure Improvement Initiatives

Orange Cove has initiated additional community improvements that will improve infrastructure systems and provide additional amenities for local residents. These improvement projects are described below

- Expand the Wastewater Treatment Plan for 1.5 million gallon per day (mgd.) capacity
- Construct additional filtration and storage improvements for Water Plant

Orange Cove's Economic Development Initiatives and Projects⁴⁷

The City's ongoing economic development initiatives are focused on expanding infrastructure services and attracting a new solar farm. Three initiatives listed below were incorporated into the City's CEDS.

- Explore the potential to attract a solar farm
- The City applied for EDA funding to construct infrastructure improvements to support a new commercial shopping center. Infrastructure improvements will be, but not limited to, the extension of a sewer line, curb and gutter, traffic lights, sidewalks and median island
- The City will need to fund off-site improvements needed to attract an industrial manufacturer to the 13.5 acre industrial site on the NEC of Jacobs and South Ave.

PARLIER ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Parlier's Economic Development Goals

The City of Parlier is in need of an economic development vision with clearly stated goals and priorities and the city is in process of developing a vision to actively seek industrial, downtown and retail development that better meets the needs of local residents. An economic development professional team sponsored by the California Academy for Economic Development determined the need for a City vision.⁴⁸

Parlier's Economic Development Strategy

The CALED LEAP report recommended the areas of focus and actions described below.

Downtown Revitalization

- Find inexpensive ways to develop the downtown as an easy and attractive venue for social gatherings and festivals; which can become catalysts for investment, generate civic pride, and bring business to downtown merchants
- Support the formation of a downtown merchants association to help organize various activities and improvements, including hospitality training
- Retain and recruit key establishments that bring locals in the downtown, including the Post Office, City Hall, Library, a good hardware store, banks and ATM's, schools, gathering places, local restaurants, health clubs, etc.

⁴⁷ See Appendix B, Table B-8 for a summary of Orange Cove's economic development initiatives

⁴⁸ An Assessment of Parlier's Economic Development Potential and Strategy, February 2016



- Consider making a commercial kitchen available to caterers and the cottage food industry
- Select buildings with potential and a willing owner(s) and encourage façade improvement and other building renovations
- Continue making streetscape improvements
- Develop City property compatibly with efforts to attract shoppers and other visitors
- Support the Chamber through cooperative events/festivals
- Create a downtown revitalization plan

Business Retention and Expansion

- Actively retain existing large employers, including the Bank of the West, Maxco, Sunwest, USDA, the UC research centers, the UHI health clinic, and supermarkets
- Conduct a business visitation program
- Work with schools and colleges on training programs that directly support the needs of local businesses
- Arrange technical assistance and training in groups and individually through the SBDC, the SBA, SCORE, and Reedley College
- Continuously inform citizens about the importance of thriving local businesses
- Support the School District to improve school performance, and to better serve students

Business Recruitment

- Create attractive, content-rich business recruitment materials in two versions – one tailored to industrial prospects and one tailored to retail prospects
- Continue recruiting commercial establishments to Manning, the Downtown, and other designated commercial areas
- Form a “Red Team” approach to business permits by conducting pre-application meetings that include all agencies and departments who will be reviewing an application

Build-Out the Industrial Park

- Sell remaining industrial land to private owners that will agree to develop the site
- Punch through the access road to Academy as quickly as possible
- Recruit smaller and mid-sized distribution facilities such as Amazon, Dollar General, etc.

Recruit a Hotel

- Engage in lodging recruitment
- Enact a Transient Occupancy Tax to prepare for Parlier’s first lodging place



Parlier Economic Development Initiatives and Projects⁴⁹

The City's ongoing economic development initiatives are focused on expanding infrastructure services, establishing a new business incubator for green technologies, and providing green technology, health care and other job training services for residents. The city identified four initiatives listed below.

- Expand and upgrade the City Wastewater Treatment Plant
- Establish the Parlier Business Incubator and Training Center (PBIT) with a focus on creating Green Technology and healthcare field jobs
- Fund water and sewer infrastructure and other offsite improvements required in advance of developing Phase 2 of the Parlier Industrial Park
- Complete the required off-site infrastructure improvements required to develop the new 31-acre commercial site

Other longer-term projects that are under consideration are described below.

Civic Center Expansion

The city would like to expand the fire station and purchase the adjacent property for the new City Hall and Police Headquarters at a cost \$20-\$30 Million.

Upgrade the Technology Center

The City intends to provide additional computing equipment and classroom space for children and adults at the established Technology Center. Grant funds were received to complete a needs assessment that will support additional grant applications to fund the proposed improvements.

City Beautification

The City intends to plant more trees and initiate additional beautification projects that will make Parlier a more inviting place for residents and businesses. The City applied and was awarded a grant to purchase and plant approximately 550 trees throughout the community. Staff is preparing to implement the grant.

Youth Job Training and Services

The City of Parlier is very involved in the community and much of that is focused around their Youth Center and Tech Center. They keep their youth center busy with free classes for young

⁴⁹ See Appendix B, Table B-9 for a summary of Parlier's economic development initiatives



and old. Their Tech center houses Youth Centers of America and has 30 people working out of it for various assistance entities like job counseling, EOC and Proteus.

6.6 West County Economic Development Goals and Strategic Initiatives

Figure 18 summarizes the goals, strategies and economic development projects initiated by the West County Cities of San Joaquin, Kerman, Firebaugh, Mendota, Coalinga and Huron. A more detailed description of West County's local economic development initiatives are described in the narrative below.

Figure 18 = West County Economic Development Goals and Strategic Initiatives

SAN JOAQUIN ECONOMIC DEVELOPMENT GOALS	SAN JOAQUIN STRATEGIC PLAN	SAN JOAQUIN'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
<p>Promote job-training opportunities available to residents</p> <p>Support community events</p> <p>Promote the CBD as an attractive place business location</p> <p>Reduce business attraction obstacles</p> <p>Attract businesses that enhance the City's fiscal revenues</p> <p>Support business attraction, retention and expansion</p> <p>Prioritize infrastructure investments for infill sites</p>	<ul style="list-style-type: none"> Attract business to occupy vacant industrial buildings Expanding retail is not the current priority 	<ul style="list-style-type: none"> Improve Access to Cherry Lane Industrial Park Improve South Railroad Avenue
KERMAN ECONOMIC DEVELOPMENT GOALS	KERMAN STRATEGIC PLAN	KERMAN'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES

The General Plan describes a few Economic Development Element goals

- | | | |
|---|--|---|
| <ul style="list-style-type: none"> Enhance Kerman's image and preserve its single-family residential neighborhood character Attract new business that enhances City revenues Protect Kerman's prime agricultural land and natural resources Expand retail shopping and commercial service opportunities Provide infrastructure | <ul style="list-style-type: none"> The Fresno EDC provides business attraction and expansion assistance but the City also pursues its own leads in response to business location inquiries Attempts are being made to convert downtown into a more walkable area | <p>Kerman has no ongoing economic development projects that the City is pursuing at this time</p> |
|---|--|---|

that supports a
secondary water supply
system

FIREBAUGH ECONOMIC DEVELOPMENT GOALS	FIREBAUGH STRATEGIC PLAN	FIREBAUGH'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
<p>The 2025 General Plan describes land use goals focused on improving the community's appearance.</p> <p>No economic development vision or goals are included in the General Plan and no other studies or plans provide guidance</p>	<p>The City's economic development priorities include.</p> <ul style="list-style-type: none"> • Redevelop vacant and underutilized sites located downtown • Encourage development of mixed-use buildings that combine commercial and residential uses • Attract cold storage, food processing, distribution and packaging establishments to the industrial area • Develop more housing to address the lack of homes to buy or rent • Attract a new supermarket 	<ul style="list-style-type: none"> ▪ Provide water, sewer and storm drainage infrastructure to 40 acres of industrially zoned land

MENDOTA ECONOMIC DEVELOPMENT GOALS	MENDOTA STRATEGIC PLAN	MENDOTA'S ONGOING ECONOMIC DEVELOPMENT INITIATIVES
<p>Support fiscally sustainable development</p> <p>Monitor new job opportunities available to residents</p> <p>Attract more commercial services</p> <p>Promote the Mendota Wildlife Area as a potential visitor destination.</p> <p>Locate business services, offices and public buildings downtown</p> <p>Encourage a mix residential and commercial uses downtown</p> <p>Support business retention and expansion</p> <p>Promote compact City growth</p> <p>Coordinate with Caltrans about the SR 180 re-alignment</p> <p>Prepare an Airport Master Plan to identify future needs and opportunities</p>	<p>Mendota's strategic priorities are listed below</p> <ul style="list-style-type: none"> ▪ Attracting commercial businesses to various commercial infill sites ▪ Attracting a solar farm to a 200 acre site near the wastewater treatment plant ▪ Street reconstruction ▪ Underground storm drains 	<ul style="list-style-type: none"> • Prepare a written Economic Development Plan that will strengthen funding applications • Establish a Pilot's School at the Mendota Airport

SAN JOAQUIN ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Economic Development Goals

The 2030 General Plan that was updated in 2014 included a list of economic development goals and policies that are listed below:

- Promote job-training opportunities at West Hills Community College and elsewhere
- Support community events such as the Farmer's Market
- Partner with the Chamber of Commerce to promote the CBD as an attractive business location
- Reduce business attraction obstacles
- Attract business that enhances the City's fiscal revenues
- Support business attraction, retention and expansion
- Prioritize infrastructure investments for infill sites

Economic Development Strategy

San Joaquin's City Manager functions as the lead economic development staff person. The City has contracted with the Fresno EDC to market the vacant industrial buildings.

Overall, the City would like to see a pharmacy, a grocery store, a fast food restaurant and other retailers attracted to San Joaquin, but the small population base and low incomes constrain that effort. In addition, past retail recruitment efforts did not succeed and the Council is not likely to pursue retail recruitment in the near future.

Lastly, agricultural businesses have been changing their crops from cotton, corn and hay to orchards like pistachio and almond. This has put many people out of work for a while, but once the trees have matured it should provide more year-round employment.

Other Community Improvements

San Joaquin initiated other infrastructure improvements described below that will provide additional amenities for local residents.

- Construct a new domestic water well that provides adequate capacity during peak season - The City received a \$1.065 million USDA grant to partially fund this project.
- Purchase a new 750,000-gallon water storage tank to supplement capacity of existing and proposed domestic wells and construct new 12" water main line that will connect to existing wells with the new water tank - CDBG funds were secured to partially fund the project.
- Widen North Railroad Avenue and reconstruct a narrow, deteriorated street that serves two existing businesses and one unused property containing an underutilized grain elevator and warehouse building - The existing 18-foot wide pavement is too narrow for safe vehicular travel.



- Construct a new storm drain lift station and relief line to the adjacent irrigation ditch along California Avenue - This improvement will address capacity issues with undersized basin.
- Water filtration treatment

Economic Development Initiatives and Projects⁵⁰

The City's ongoing economic development initiatives listed below are focused on basic water, sewer and roadway improvements that are needed to support job and population growth.

- Construct a new street and expand infrastructure services for the Cherry Lane Industrial Park
- Install an on-site sewer debris trap for a hatchery business located in the Cherry Lane Industrial Park that is experiencing clogging of its sewer lateral by debris
- Support truck traffic by reconstructing 1,000 feet of South Railroad Avenue from Manning Avenue to Main Street that serves the City Corporation yard and three light-industrial properties
- Install new storm drains and drainage along South Railroad Avenue

KERMAN ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Kerman's Economic Development Goals

Kerman's General Plan articulates a set of land use goals listed below that generally expresses community values and a vision for the future.

- Enhance Kerman's image and preserve its single-family residential neighborhood character
- Attract new business that enhances City revenues
- Protect Kerman's prime agricultural land and natural resources
- Expand retail shopping and commercial service opportunities
- Provide infrastructure that supports a secondary water supply system

⁵⁰ See Appendix B, Table B-10 for a summary of San Joaquin's economic development initiatives



Kerman's Economic Development Strategy

Kerman's City Manager functions as the lead economic development staff person. The City has identified a few sites available for commercial retail establishments and some general areas where industrial prospects may locate (<http://cityofkerman.net/industrial-opportunities/>). The City pursues new business leads and inquiries and also contracts with the Fresno EDC for business attraction, expansion and retention service. The City is expanding east and west with new housing for commuters to the Fresno metropolitan area. A Walmart Supercenter was attracted two years ago, but now downtown is an area of concern that the City would like to revitalize. The City would like to make Kerman more walkable for its residents and visitors and provide people more places to shop. The Community Center is the downtown hub and the new Senior Center is set to move into the area. A .75 percent sales tax measure to fund downtown improvement projects is under consideration.

The Kerman industrial area includes 100+ acres of available land, some of which has access to the San Joaquin Valley Railroad. The City of Kerman owns 10 acres of shovel-ready land within this industrial area. The City is currently working with the developer on a 30-acre commercial project located on Whitesbridge Road, as well as working with a potential tenant wishing to locate in the City's industrial park.

The City entered into a Power Purchase Agreement (PPA) with Borrego Solar to design, finance, install, and operate a 500 kW solar array to power the Waste Water Treatment Plant (WWTP). The WWTP utilized renewable energy to generate predictable and lower energy costs. The wastewater treatment plant now has significant capacity to support new growth. However, Kerman's water quality is problematic, and costly deeper wells may be required to the system that relies on ground water.

Community Improvement Projects

The City's ongoing economic development initiatives are focused on implementing the Madera Avenue Master Streetscape Plan in 2012. Specific initiatives are designed to improve safety, improve the flow of vehicular travel through Kerman, encourage new business downtown and beautify corridor through Kerman. The improvements are anticipated to costs \$350,000. The City is currently seeking funding to implement short and mid-term recommendations.

Economic Development Initiatives and Projects

Kerman has no ongoing economic development projects that the City is pursuing at this time

FIREBAUGH ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Economic Development Goals

Firebaugh's 2025 General Plan describes land use goals that are primarily focused on improving the community's appearance. However, the General Plan does not describe any economic

development vision or goals, and no recent studies or plans have been prepared that may provide guidance on the City's Economic Development Goals

Economic Development Strategy

City officials are very positive and forward thinking about their community but are limited by resources and looking for ways to assist business and grow sustainable jobs in their city. Firebaugh's City Manager functions as the lead economic development staff person. The City has been engaged in a number of economic development initiatives during the past few years. Tomatek expanded their West Valley tomato production operations and added 300 workers to the processing facility in Firebaugh. Business attraction targets to the industrial area include:

- Cold Storage
- Food Processing (Ketchup)
- Distribution
- Packaging

Regarding commercial development, the City attracted a new Dollar Store and desires to attract a new supermarket. Downtown revitalization is a priority and the City attracted a new \$44 million West Hills College classroom building that is activating the downtown area with new people. However, numerous vacant and underutilized sites and buildings remain to be redeveloped. Mixed-use buildings that combine commercial and residential uses will be encouraged in Firebaugh.

Developing more housing in any form is a City priority as Firebaugh suffers from a lack of homes to buy or rent. Apartments have waiting lists with new housing being developed in Mendota, Dos Palos and Madera. An old ground water well was replaced to assist current customers and the demand for new housing and commercial space.

Economic Development Initiatives and Projects⁵¹

Firebaugh's primary economic development initiatives are focused on expanding basic water, sewer and other backbone infrastructure services that are needed to attract industrial business and continue to support local processors of agricultural products. The City is currently working on replacing a ground water well that can supply future water to this proposed industrial area. After the well is on line the City can begin securing funding for the water lines, sewer lines and storm drain facilities.

⁵¹ See Appendix B, Table B-11 for a summary of Firebaugh's economic development initiatives



MENDOTA ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Mendota's Economic Development Goals

Mendota's General Plan articulates a set of land use goals that generally expresses community values and a vision for the future. The goals are listed below:

- Support fiscally sustainable new development
- Monitor job opportunities in the City and surrounding areas
- Attract more commercial services
- Promote the nearby Mendota Wildlife Area as a potential visitor destination
- Business services, offices and public buildings and social centers should be located downtown
- Encourage a mix residential and commercial uses downtown
- Support business retention and expansion
- Promote compact growth that will encourage the preservation of prime agricultural land
- Coordinate with Caltrans about the SR 180 re-alignment
- Prepare an Airport Master Plan to identify future needs and opportunities

Mendota's Economic Development Strategy

The community lacks an inventory of vacant commercial or industrial buildings to market. A number of undeveloped sites have owners that intend to retain their properties as open space, green fields or vacant lots. Implementation of plans to realign SR 180 will open up new sites for commercial development. The City is exploring opportunities to bring solar to approximately 200 acres of land it owns near its wastewater treatment plant.

Mendota's City Manager functions as the lead economic development staff person with assistance from the Planning and Economic Development Manager. Current economic development initiatives are focused on attracting commercial businesses to various commercial infill sites. Mendota is not a member of the Fresno EDC and utilizes their own staff resources to engage in business attraction, expansion and retention efforts.

Mendota's Economic Incentive Zone Overlay District (EIZ)

The City of Mendota offers incentives to qualifying business owners with property or operations located on Oiler Avenue (State Route 180), Derrick Avenue (State Route 33) and 7th Street (Downtown). The business incentives will reduce the planning and building fees, and offer more flexible development standards. The city credits the EIZ incentives as a critical factor that helped attract a new McDonalds and AutoZone this past year. The AutoZone will be hiring about 35 part-time and 12 full-time employees.

Sixth Street Reconstruction and Rehabilitation

The city completed reconstruction of an arterial street, adjacent to the main Downtown Corridor, from State Route 180 to State Route 33 consistent with the downtown beautification goals.



Other Ongoing Civic Improvement Projects

The City's ongoing economic development initiatives are focused on expanding commercial services and the beautification of downtown (7th Street) and the entryway corridors along State Routes 33 and 180. Plans to modernize and re-invent the central commercial sector of Mendota, including the addition of a park or other centralized public amenity, have fostered an increased level of community engagement with local interest groups, civic leaders, and business owners.

Economic Development Initiatives and Projects⁵²

Prepare a Written Economic Development Plan

The City has been preparing a written Economic Development Plan for a number of years with in-house staff resources. This written and focused plan will allow for a more efficient approach and will strengthen any applications for funds related to ED projects.

Establishment of a Pilot's School

The city envisions the creation of a flight school that would provide flying lessons in light, electric planes. A flight school would expand the use of the Mendota airport, provide training for well-paying jobs and bring positive attention and attract more visitors to the community. A funding source for this concept has yet to be identified.

COALINGA ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Economic Development Goals

Coalinga's 2025 General Plan Land Use Element describes the City's Economic Development Goals and policies that relate to land use that are listed below.

- Preserve Coalinga's rural small town character
- Attract new businesses that balances the City's economy
- Ensure that sufficient fiscal resources are available to support new development
- Encourage sustainable development proposals
- Encourage commercial development in the Downtown area
- New commercial development should minimize negative impacts to the Downtown Core
- Support the development of new clean industries with minimal pollution, waste, or utilize large amounts of hazardous materials

⁵² See Appendix B, Table B-12 for a summary of Mendota's economic development initiatives



Economic Development Strategy

For decades, Coalinga has been engaged in efforts to diversify the local economy away from dependence on the extraction of oil and gas. Despite the successes, no one anticipated the 2011 Claremont Custody Center closure and the more recent collapse of the world oil price and the related employment impacts in Coalinga. The economic diversification initiatives undertaken by the City are listed below.

- Residents approved a bond in 1988 to fund a \$14 million community hospital that replaced the one destroyed in the 1983 earthquake.
- The City completed an 800-acre annexation for the Pleasant Valley State Prison and the new airport in 1991, which helped establish a 40-acre industrial park.
- An \$8 million airport facility was built in 1996.
- The College Farms, a 180-acre site devoted to school related operations with agriculture, was relocated north of the old airport in 2001.
- The Coalinga Regional Medical Center was completed in 2002.
- The Coalinga State Hospital, a new mental health facility for incarcerated persons was completed in 2005.
- One current initiative to diversify is to transform the former Claremont Custody Center into a 77,000 square foot cannabis cultivation and manufacturing facility for the extraction of oils. Within the past two months, the City sold the closed facility to a developer for \$4.1 million, which immediately brought the City's budget into the black, and it will reuse a facility that would otherwise deteriorate and become blighted over time. The prison reuse project will also create approximately 100 new jobs, which the developer has pledged to fill with local applicants.

Coalinga's Community Development Director functions as the lead economic development staff person. The City has identified industry clusters that can expand and continue to diversify the local economy. The City has contracted with Fresno County EDC to assist in attraction. The attraction targets listed below build on Coalinga's strengths and regional location.

- **Medical Cluster** - takes advantage of the skilled professionals that have been attracted to work at the Coalinga State Hospital and the Coalinga Regional Medical Center
- **Education/Training Cluster** - takes advantage of the training offered at West Hills College in fiber optics, advanced technologies, Ag-Value and long-distance learning through major medical institutions
- **Advanced Logistics & Distribution Cluster** - takes advantage of the City's proximity to Interstate 5 and the training offered at West Hills College



Economic Development Initiatives and Projects⁵³

The Coalinga Redevelopment Agency intended to issue a Redevelopment Tax Allocation Bond to fund improvements to streets, infrastructure updates, property acquisition, beautification and affordable housing projects prior to the dissolution of Redevelopment Agencies. The Agency also acquired property along the blighted main thoroughfares, and began to improve the properties for sale as shovel ready commercial sites. A number of the vacant lots located in the downtown corridor remain vacant and underutilized. The City is working with the Successor Agency/Oversight Board and the City Engineer to identify parcels that will be sold on the market.

The City is actively courting cannabis growing business establishments that will supply the demand for medical marijuana. Within the past two months, the City sold the closed Claremont Custody Center to a developer who will transform the facility into a medical cannabis oil extraction manufacturing plant. This is a major innovative project that will help balance the City budget and reuse a facility that would otherwise deteriorate and become blighted over time.

In addition, the Juniper Ridge Industrial Park has 12 shovel ready industrial sites on 30 acres of land owned by the RDA successor agency. This development includes completed streets, curbs and gutters. The City is actively marketing these sites and will consider offers from medical marijuana growing facilities and other potential industrial establishments.

HURON ECONOMIC DEVELOPMENT GOALS AND STRATEGY

Economic Development Goals

Huron's 2025 General Plan articulates a set of land use goals and objectives that generally expresses community values and a vision for future commercial and industrial growth. The goals and objectives are listed below.

- Ensure the continued viability of Huron's commercial areas
- Designate a sufficient supply of land to match Huron's needs for new commercial services
- Accelerate the project review process for business development proposals
- Promote industrial sites that are functional, have access to public services and transportation networks

⁵³ See Appendix B, Table B-13 for a summary of Coalinga's economic development initiatives

Economic Development Strategy

Huron's City Manager functions as the lead economic development staff person. The City purchased 60-acres of land along State Route 269 near the northern edge of town with "shovel ready" commercial and industrial park sites. The City can adjust the lot sizes within reason to meet the needs of specific business prospects. Huron also created the "Targeted Approval" Team that can make binding decisions at the staff level to ensure rapid approval of proposed projects in the Industrial Business Park area.

Huron has established a small weekly farmers market that operates between May and October. New housing has also been attracted with 38 homes subsidized by a CalHome Grant and another 56 apartments being developed supported by home tax credits.

Economic Development Initiatives and Projects⁵⁴

The City secured a "Letter of Intent" or a signed contract to attract a modular building manufacturing company on a 7-acre site located within the Huron industrial area, but a final agreement was not concluded. Locating a tenant will require the extension of water and sewer services to the industrial sites, along with the construction of new roads and other infrastructure services. The City will continue to promote the industrial area and cannabis producers are a potential tenant.

⁵⁴ See Appendix B, Table B-14 for a summary of Huron's economic development initiatives



7. BENCHMARKS AND PERFORMANCE MEASURES

Economic development activities initiated by Fresno County and 14 medium and small cities can be measured with benchmarks that document progress toward accomplishing the regional economic development goals. The recommended benchmarks measure outcomes and de-emphasize process tasks such as making phone calls or attending meetings.

The performance measures data should be collected and reported on an annual basis with progress measured using available data such as wages, jobs and educational attainment. However, some staff time will be needed to communicate with each local government jurisdiction and collect primary data that measure other goal accomplishments such as improving backbone infrastructure or sustainable agricultural practices. Efforts to benchmark regional economic performance could be maintained by the Fresno EDC guided by a stakeholder committee with knowledge of data sources and analytical techniques. Selected measures should be shared with the community and reported relative to the neighboring counties and the State of California.

Benchmarks to Measure Goal #1



New Job Creation

Measuring Accomplishments: *New Job Creation*

The California Employment Development Department publishes employment by industry data that can track Fresno County's job creation progress. Tracking employment data will provide the information needed to compare Fresno County job creation results with the neighboring counties of Madera, Kings, and Tulare and the State of California. The Fresno EDC and other stakeholders may consider tracking non-farm private sector employment as well as total jobs given the nature of Fresno County's economy.

As a reference point 10,300 new jobs were created in Fresno County between 2014 and 2015, and 472,800 new jobs were created throughout the State of California during the same time period. Fresno County's jobs expanded at 2.8 percent compared to California's 3 percent growth rate.

Benchmarks to Measure Goal #2



Increase Incomes and Wages

Measuring Accomplishments: *Increase Incomes and Wages*

The California Employment Development Department publishes data on total annual payroll and average weekly wages paid that can track Fresno County's progress at raising incomes over time. The data will allow the Fresno EDC to compare Fresno County wages paid over time in comparison to the neighboring counties and the State of California.

As a reference point the 2014 average weekly wage paid in Fresno County was \$711, which increased to \$739 paid in 2015. In comparison, the 2014 average weekly wage paid throughout California was \$1,125, which increased to \$1,178 by 2015. The numbers should be adjusted for inflation to accurately measure progress.

Benchmarks to Measure Goal #3



Improve Educational Attainment

Measuring Accomplishments: *Improve Educational Attainment*

The U.S. Census American Community Survey reports educational attainment progress on an annual basis. The ACS data can measure the percentage of Fresno County adults (age 25+) that completed High School compared to the percentage of adults that completed High School in the neighboring counties and the State of California. The data can also measure the percentage of Fresno County adults that have earned a college degree compared to the percent of adults that have earned a college degree in the neighboring counties and the State of California.

As a reference point 73.2 percent of Fresno County adults graduated from High School in 2014, which improved to 73.3 percent in 2015. Throughout California 81.5 percent of adults graduated from High School in 2014 that improved to 81.8 percent by 2015.

In addition, 19.5 percent of Fresno County adults earned a college or advanced degree in 2014 that remained at 19.5 percent in 2015. Thirty-one percent of California adults earned a college or advanced degree in 2014, and the number remained at 31.0 percent in 2015.

Benchmarks to Measure Goal #4



Improve Backbone Infrastructure

Measuring Accomplishments: Improve Backbone Infrastructure

Designated industrial areas should have shovel ready sites that are adequately subdivided and zoned with access to wastewater treatment, storm drainage, an adequate water supply and roadways that connects site to regional transportation networks. This requires good backbone infrastructure systems, but measuring progress with improving backbone infrastructure will require a ground up data collection effort since this type of information is not available on-line or via other secondary sources.

- **Shovel Ready Sites** – An inventory of the available business sites that are properly zoned and have adequate infrastructure services should be documented and periodically updated. The data can be collected through annual contacts with the 14 cities included in this CEDS report.
- **Wastewater Treatment** – Shovel ready commercial and industrial sites have access to adequate wastewater treatment. This information can be documented in the initial inventory of shovel ready sites, but the performance measures can also track the capacity of treatment plants to support new business connections, any potential growth constraints that are in place, and the capacity to expand the plant to support new industrial and commercial connections.
- **Storm Drainage** – Shovel ready sites must have adequate storm drainage to prevent periodic flooding. The performance measures can track the capacity of each city's storm drainage systems to support new growth and any ongoing improvements.
- **Water Supply** – Shovel ready sites must have access to an adequate supply of water and some prospects require high levels of water quality. The performance measures can track the capacity of each city's water supply systems to support new growth along with improvements that are being made to the water supply.
- **Roadway improvements** – A number of highway interchange projects are underway that improves backbone infrastructure. These improvements can be measured and reported on an annual basis for the individual cities.

Benchmarks to Measure Goal #5



Encourage Sustainable Agriculture

Measuring Accomplishments: *Encourage Sustainable Agriculture*

Sustainable agriculture refers to the introduction of water conservation technologies and improved ground water management practices for both farming and all types of agricultural support industries (i.e. the agriculture cluster). Efforts to encourage sustainable agriculture can be measured by documenting grants, technical assistance and services delivered by government and non-profit organizations that are described below.

International Center for Water Technology, Fresno State

The International Center for Water Technology (ICWT) is internationally recognized as an independent testing laboratory, applied research facility and educational resource. They lead the water cluster in Fresno County and the region, growing from 30 manufacturers in 2001 to over 200 in 2016. They work closely with the Fresno Regional WIB to provide a qualified workforce to manufacturing companies. (<http://www.icwt.net/>) The increase in the number of jobs in Water Technology can be measured.

Fresno Water, Energy and Technology (WET) Center

The WET Center provides connections, resources, business and technology support for central San Joaquin Valley companies engaged in farming or other agricultural support services. The WET Center offers business counseling and technology evaluation services that improve irrigation efficiency and water conservation efforts. The number of firms assisted can be measured.

U.C. Cooperative Extension Service

The U.C. Cooperative Extension Service offered a Surface Irrigation Efficiency Workshop in 2016 and the number of Fresno County establishments that may participate in future workshops could be documented. Cooperative Extension also offers irrigation management meetings that communicate research findings and educate the agricultural industry on best technology and management practices available for irrigated agriculture. The number of firms that attend these meetings can be documented.

California Department of Water Resources

DWR offers a \$19 million pool of grant funds that will support energy efficiency, water conservation and greenhouse gas reduction efforts. Fresno County recipients of the grants can be documented.

Benchmarks to Measure Goal #6



Enhance Fresno County as a Regional Economic Development Hub

Measuring Accomplishments: *Enhance Fresno County as a Regional Economic Development Hub*

Fresno County is the hub for a number of regional economic development initiatives that can enhance agriculture, help attract higher paying jobs and encourage sustainable economic development practices. This is largely due to the presence of the Office of Community and Economic Development (OCED) at Fresno State University, which is a designated EDA data center. Efforts by OCED and other non-profit organizations can be measured by documenting the annual accomplishments. However, there is no available data on line, and information will need to be compiled from each organization.

Fresno County Economic Development Corporation

The Fresno County EDC provides a central focus for regional economic development initiatives and provides a forum for innovative thinking, and a central location for regional meetings. The Fresno EDC was the driving force that gained support for high-speed rail and for securing the Brookings Institute Global Cities Initiative export oriented strategy for agricultural commodities and value added products. They also participate with the 8-county regional California Central Valley EDC (CCVEDC) where they sit on the boards of the Partnership for the San Joaquin Valley and the California International Trade and Investment Advisory Council.

Partnership for the San Joaquin Valley

The California Partnership for the San Joaquin Valley is an unprecedented public-private partnership sharply focused on improving the region's economic vitality and quality of life for the 4 million residents in the San Joaquin Valley. Founded in June 2005, the Partnership is an effort to address the unique challenges facing the Valley as well as the region's importance to California. The Partnership was designed to address the region's challenges while establishing a solid framework for the future. Three overarching goals were developed for the Valley with the advent of the SAP: develop a prosperous economy, create a quality environment, and achieve social equity.

Fresno Economic Opportunities Commission

Fresno Economic Opportunities Commission, known as Fresno EOC, is considered the largest and most effective poverty-fighting organizations in the country. Fresno EOC touches the lives of more than 145,000 residents of Fresno County, through programs ranging from pre-school education to vocational training; from juvenile and drug abuse counseling to treatment for serious juvenile offenders; from youth recreation to senior citizen hot meal services; from

energy conservation education to crisis intervention; from preventive health care to prenatal nutrition education; and from vocational counseling to job placement services.

San Joaquin Central Valley Ag Plus Food and Beverage Manufacturing Consortium

AgPlus is a Fresno based federal and local partnership that intends to strengthen the food and beverage manufacturing industry in 28 central valley counties extending from Shasta in the north to Kern in the south. The consortium is one of 12 nationally designated regions that EDA intends to help revitalize the manufacturing sector. Designated communities receive the support of 11 federal agencies that control \$1.3 billion of federal funding. Grants awarded to Fresno County and the larger region can be quantified as a measurement of success.

Central Valley Innovation Cluster

Fresno State was awarded a \$5 million grant from the California Energy Commission to establish the Central Valley Energy Innovation Cluster, a business incubator that will focus on providing key services, infrastructure and resources for entrepreneurs that want to commercialize new water- and energy-related technologies and innovations. The number of entrepreneurs assisted and jobs created can be measured.

San Joaquin Valley Regional Broadband Consortium

The Regional Broadband Consortium is a Fresno based initiative that is dedicated to accelerating the deployment, accessibility, and adoption of broadband within the San Joaquin Valley. It takes a comprehensive regional approach to improve broadband infrastructure, expanding health care telecommunications, and expand digital literacy across the Valley. The consortium's annual accomplishments can be documented and measured.

Fresno State Small Business Development Center

The Fresno State SBDC provides education, consulting and technical assistance through one-on-one business consulting and training services for entrepreneurs and small business establishments. The number of entrepreneurs and small businesses that the SBDC assists can be measured on an annual basis.

Fresno Community Development Financial Institution

The CDFI was established in 2009 as a non-profit loan fund that helps small business owners access financing and provide business advisory training. The fund assists small businesses not eligible for conventional bank financing. Its pool of lending capital was recently expanded with a \$1 million grant from Wells Fargo. The CDFI produces an annual report with outcome measures that can be utilized to document the regional performance measures.



Benchmarks to Measure Goal #7



Strengthen Connections

Measuring Accomplishments: *Strengthen Connections Between Community Needs and Available Resources*

Fresno County has a strong network of available resources to assist community based economic development initiatives. Established governmental and non-profit organizations with available resources include Fresno County Economic Development Corporation, Fresno Economic Opportunities Commission, Fresno Regional Workforce Development Board, the Fresno State SBDC, the Central California iHub, the San Joaquin Valley Rural Development Center, the Fresno Community Development Financial Institution (CDFI) and others. However, communities in need often lack information about the available funding resources and technical assistance resources. Access to the available resources can be measured by totaling the loans and technical assistance resources delivered on an annual basis. This information will need to be compiled from each organization since the data is not available data on line.

Figure 19 - Benchmarks for Fresno County CEDS Goals

Regional Economic Development Goals	Performance Measures	Data Sources
Goal #1: Expand Job Creation	Total number of new jobs created each year	California Employment Development Department http://www.labormarketinfo.edd.ca.gov/geography/lmi-by-geography.html Fresno County EDC Economic Impact Report (http://www.fresnoedc.com)
Goal #2: Increase Household Income and Wages	Average weekly pay for all industries	California Employment Development Department Annual Census of Wages by Industry http://www.labormarketinfo.edd.ca.gov/qcew/CEW-Major_NAICS.asp
Goal #3: Improve Educational Attainment	<ul style="list-style-type: none"> Percentage of adults age 25 and older that graduated from High School Percentage of adults age 25 and older that earned a College Degree 	U.S. Census American Community Survey http://www.towncharts.com/California/California-state-Education-data.html
Goal #4: Improve Backbone Infrastructure	<ul style="list-style-type: none"> Inventory of shovel ready business sites Wastewater Treatment Improvements Significant roadway improvements Water supply improvements 	Data must be collected on a ground up basis with measures of improvements collected from each City and reported on an annual basis

Goal #5: Encourage Sustainable Agricultural Supply Chain	<ul style="list-style-type: none"> • # of jobs increased in Water Technology • # of agricultural cluster establishments that received business counseling services or technology evaluation from the WET Center • # of individuals that attend the Surface Irrigation Efficiency Workshops and other Irrigation meetings offered by U.C. Cooperative Extension Service • # of State water efficiency loans and grants received 	<p>Fresno County EDC Economic Impact Report (http://www.fresnoedc.com)</p> <p>Fresno Water, Energy and Technology Center (http://wetcenter.org)</p> <p>U.C. Cooperative Extension Service (http://ucanr.edu/sites/Irrigation_and_Soils/_Extension_and_Outreach/)</p> <p>DWR Water-Energy Grant Program (http://www.water.ca.gov/waterenergygrant/index.cfm)</p>
Goal #6: Enhance Fresno County as a Regional Economic Development Hub	<ul style="list-style-type: none"> • Firms receiving Business Retention and Expansion Services • Firms receiving food and beverage manufacturing assistance • Business Incubator Services • Entrepreneur and small businesses loans and technical assistance • Broadband access accomplishments 	<p>Fresno County EDC Economic Impact Report (http://www.fresnoedc.com)</p> <p>Central Valley Ag Plus Food and Beverage Manufacturing Consortium (http://cvagplus.org)</p> <p>Central Valley Innovation Cluster (http://sjvpartnership.org/fresno-states-central-valley-innovation-cluster-gears-up/)</p> <p>Fresno State Small Business Development Center (http://fresnostate.edu/academics/sbdc/about/index.html)</p> <p>Fresno Community Development Financial Institution (https://fresnocdfi.com/about-us/)</p>
Goal #7: Strengthen Connections Between Community Needs and Available Resources	<p>Total small business loans and technical assistance services received</p>	<p>Same as Goal #6</p>

8. ECONOMIC RESILIENCE

Fresno County's ability to survive and adapt to sudden acute shocks such as earthquakes, floods, disease outbreaks, other extreme weather events or unexpected economic shocks such as the 2008 financial crises is a measure of economic resilience. The most likely natural and man-made shocks that Fresno County may need to adjust to are described below.

Potential Long Term Drought

The California drought that started in 2012 is more of a slow moving train wreck than an extreme weather event. A continuation of drought into the future will add to the degrading of underground aquifers along with a reduced capacity of the Central Valley Water Project to continue delivering surface water from aqueducts that connect Fresno County to the northern California water sources. Potential long-term drought will have a significant impact on crop production and ecosystems.

Potential Wildfires

Wildfires in the foothills, which are directly related to the drought, can destroy small, unincorporated communities, wildlife, ecosystems and recreational amenities used by Fresno County residents and out of area visitors.

Earthquakes

Earthquakes are an ongoing risk anywhere in California, but certainly less so in Fresno County than in the Bay Area or the Southern California basin.

National Trade Wars

The recent national backlash against trade and globalization could have a severe and adverse effect on Fresno County's agricultural cluster and economic base if the federal government was to adopt protectionist policies and our trading partners retaliate against U.S. exports. An anti-trade backlash could significantly affect Fresno County's \$7 billion agricultural industry that relies on exports to world markets.

Financial Crises 2.0

A new financial crisis could be another sudden economic shock that may result in a rapid loss of jobs and revenues available to local governments.



Strategies to Strengthen Fresno County's Economic Resiliency

Fresno County's economic resiliency can be strengthened by implementing initiatives that diversify the economy, conserve the water supply, embrace renewable energy, strengthen the image, and build a resilient workforce that can better shift between jobs or industries when

their core employment is threatened by changes to the economy, automation or political priorities. Possible strategies to be considered are described below.

Encourage Water Conservation

Fresno County's economic resilience can be improved by encouraging conservation of the finite water supply that is reduced by ongoing drought. Better irrigation techniques, technology innovation and groundwater monitoring will help the area withstand potential long-term drought conditions.

Improve Education and Workforce Training

Achieving higher levels of formal education is a key factor in efforts to improve Fresno County's economic resilience. Employers are looking for a knowledge intensive educated workforce, and more educated workers can better shift between jobs and industries that are changing and being restructured.

Strengthen Brand Fresno County

A positive image of Fresno County as a place and the agriculture produced will help strengthen Fresno County's economic resilience. Community branding of agricultural products with a "Fresno County Growing the California Dream" label convey a positive image to consumers who can become potential visitors and residents. In general, consumers are not aware that popular products such as packaged almonds or Mary's chickens are from Fresno County, which could contribute to a positive branding effort.

Promote Fresno County as a Visitor Destination

Fresno County is usually not considered a visitor destination despite its many amenities. Promoting Fresno County's recreational areas, cultural assets, and its location as a gateway to Yosemite will add to the area's attractiveness as a place to live and work. New music festivals, arts and cultural events should be encouraged, which will add to social cohesiveness and improve Fresno County's economic resilience.

Accelerate Access to Reliable and Clean Energy

Improving efforts to help households and businesses access electricity from renewable energy can enhance Fresno County's economic resilience and the ability to withstand a natural disaster. Access to inexpensive solar panels, battery storage and charge stations for EV vehicles will add to Fresno County's capacity to withstand economic shock, along with reducing greenhouse gas emissions and by decentralizing the energy that is consumed.



Appendix A- Population and Economic and Employment Trends

Table 1- Population Growth Trends in California, Fresno County and the Surrounding Region: 2000 - 2016

Geographic Area	2000	2010	2014	2016	% Growth	% Growth	% Growth	Annual Growth Rate	Annual Growth Rate	Annual Growth Rate
					2000 - 10	2010 - 14	2014 - 16	2000- 2010	2010- 2014	2014- 2016
California	33,873,086	37,253,956	38,066,920	39,255,883	10.0%	2.2%	3.1%	1.0%	0.5%	1.5%
Four County Region	1,419,998	1,676,476	1,703,800	1,756,500	18.1%	1.6%	3.1%	1.7%	0.4%	1.5%
Kings County	129,461	152,982	151,400	150,400	18.2%	-1.0%	-0.7%	1.7%	-0.3%	-0.3%
Madera County	123,109	150,865	152,500	155,300	22.5%	1.1%	1.8%	2.1%	0.3%	0.9%
Tulare County	368,021	442,179	451,100	466,300	20.2%	2.0%	3.4%	1.9%	0.5%	1.7%
Fresno County	799,407	930,450	948,800	984,500	16.4%	2.0%	3.8%	1.5%	0.5%	1.9%
Fresno Metro Area	496,120	590,296	604,900	628,500	19.0%	2.5%	3.9%	1.8%	0.6%	1.9%
Fresno (City)	427,652	494,665	506,100	520,500	15.7%	2.3%	2.8%	1.5%	0.6%	1.4%
Clovis	68,468	95,631	98,800	108,000	39.7%	3.3%	9.3%	3.4%	0.8%	4.6%
South County	32,622	40,171	41,300	42,800	23.1%	2.8%	3.6%	2.1%	0.7%	1.8%
Fowler	3,979	5,570	5,900	5,900	40.0%	5.9%	0.0%	3.4%	1.4%	0.0%
Selma	19,444	23,219	23,800	24,800	19.4%	2.5%	4.2%	1.8%	0.6%	2.1%
Kingsburg	9,199	11,382	11,600	12,100	23.7%	1.9%	4.3%	2.2%	0.5%	2.1%
East County	58,554	72,036	73,800	76,600	23.0%	2.4%	3.8%	2.1%	0.6%	1.9%
Reedley	20,756	24,194	24,900	26,000	16.6%	2.9%	4.4%	1.5%	0.7%	2.2%
Sanger	18,931	24,270	24,600	26,000	28.2%	1.4%	5.7%	2.5%	0.3%	2.8%
Orange Cove	7,722	9,078	9,500	9,200	17.6%	4.6%	-3.2%	1.6%	1.1%	-1.6%
Parlier	11,145	14,494	14,800	15,400	30.0%	2.1%	4.1%	2.7%	0.5%	2.0%
West County	43,428	56,242	61,400	62,000	29.5%	9.2%	1.0%	2.6%	2.2%	0.5%
San Joaquin	3,270	4,001	4,000	4,000	22.4%	0.0%	0.0%	2.0%	0.0%	0.0%
Kerman	8,551	13,544	14,100	14,400	58.4%	4.1%	2.1%	4.7%	1.0%	1.1%
Firebaugh	5,743	7,549	7,900	8,200	31.4%	4.6%	3.8%	2.8%	1.1%	1.9%
Mendota	7,890	11,014	11,400	11,800	39.6%	3.5%	3.5%	3.4%	0.9%	1.7%
Coalinga	11,668	13,380	17,200	16,700	14.7%	28.6%	-2.9%	1.4%	6.5%	-1.5%
Huron	6,306	6,754	6,800	6,900	7.1%	0.7%	1.5%	0.7%	0.2%	0.7%

Data Sources: U.S. Census 2000 and 2010. U.S. Census American Community Survey 2014 estimates. California Department of Finance 2016 estimates; Analysis: Wahlstrom & Associates

Table 2- In & Out Migration Trends in California, Fresno County and the Surrounding Region: 2000 - 2015

Geographic Area	2000	2015	Pop Increase 2010-15	2010-15 Births	2010-15 Deaths	Net Natural Increase 2010-15	Natural Increase as a % of Growth 2010-15	Interna- tional Migration 2010-15	Domestic Migration 2010-15	Net Migration 2010-15	Migration Increase as a % of Growth 2010-15
California	37,339,485	39,071,323	1,731,838	2,512,335	1,212,477	1,299,858	75%	688,761	-256,781	431,980	25%
Four County Region	1,678,034	1,750,788	72,754	142,742	54,770	87,972	121%	17,908	-33,126	-15,218	-21%
Kings County	933,007	980,980	47,973	79,761	31,474	48,287	101%	10,877	-11,191	-314	-1%
Madera County	442,872	465,013	22,141	39,194	14,183	25,011	113%	4,541	-7,411	-2,870	-13%
Tulare County	150,088	154,982	4,894	11,694	5,161	6,533	133%	1,161	-2,800	-1,639	-33%
Fresno County	152,067	149,813	-2,254	12,093	3,952	8,141	N/A	1,329	-11,724	-10,395	N/A

Data Source: California Department of Finance. Analysis: Wahlstrom & Associates. Note: Red numbers represent negative values

Table 3- Population by Age- California and Fresno County

Population Estimates								
	Age < 20	Age 20-34	Age 35-54	Age 55-64	Age 65 +	Total	Median Age 2016	Median Age 2000
California	10,636,000	8,663,000	10,750,000	4,445,000	4,762,000	39,256,000	35.6	33.3
Fresno County	319,000	225,000	239,000	98,000	104,000	985,000	31.2	29.9
Fresno Metro Area							31.8	30.7
Fresno (City)	171,500	128,000	121,500	49,400	50,100	520,500	29.8	28.5
Clovis	33,350	22,520	28,700	11,180	12,280	108,020	33.7	32.8
South County							32.4	31.2
Fowler	2,190	1,130	1,600	440	550	5,910	30.9	31.5
Selma	8,170	5,670	5,760	2,350	2,870	24,810	31.5	28.4
Kingsburg	3,500	2,610	3,020	1,310	1,630	12,080	34.7	33.8
East County							28.5	25.9
Reedley	8,870	5,900	5,750	3,310	2,130	25,960	30.1	28.7
Sanger	8,700	5,640	6,320	2,470	2,870	25,990	31.6	28.1
Orange Cove	3,800	1,860	2,140	770	600	9,170	26.4	22.8
Parlier	5,830	4,160	3,610	900	840	15,350	25.8	23.9

West County							26.8	25.3
San Joaquin	1,800	820	920	290	180	4,010	22.5	22.1
Kerman	5,350	3,720	3,390	920	1,030	14,410	27.7	27.1
Firebaugh	3,030	2,180	1,680	820	530	8,240	25.3	24.9
Mendota	4,350	3,010	2,980	790	630	11,760	27.5	25.4
Coalinga	4,850	4,230	4,950	1,470	1,230	16,730	32.8	28.6
Huron	2,790	1,450	1,710	500	430	6,880	24.8	23.5

Percent Distribution by Age Group						Percent of State	
						2016	2000
	< 20	20-34	35-54	55-64	65 +		
California	27%	22%	27%	11%	12%		
Fresno County	32%	23%	24%	10%	11%	88%	90%
Fresno Metro Area							
Fresno (City) (# hh)	33%	25%	23%	9%	10%	84%	86%
Clovis	31%	21%	27%	10%	11%	95%	98%
South County							
Fowler	37%	19%	27%	7%	9%	87%	95%
Selma	33%	23%	23%	9%	12%	88%	85%
Kingsburg	29%	22%	25%	11%	13%	97%	102%
East County							
Reedley	34%	23%	22%	13%	8%	85%	86%
Sanger	33%	22%	24%	10%	11%	89%	84%
Orange Cove	41%	20%	23%	8%	7%	74%	68%
Parlier	38%	27%	24%	6%	5%	72%	72%
West County							
San Joaquin	45%	20%	23%	7%	4%	63%	66%
Kerman	37%	26%	24%	6%	7%	78%	81%
Firebaugh	37%	26%	20%	10%	6%	71%	75%
Mendota	37%	26%	25%	7%	5%	77%	76%
Coalinga	29%	25%	30%	9%	7%	92%	86%
Huron	41%	21%	25%	7%	6%	70%	71%

Data Sources: U.S. Census American Community Survey; Headwaters Economics

Analysis: Wahlstrom & Associates

Table 4- Primary Language Spoken at Home among age 5+ (CA, Fresno County, Cities)

		Spanish or Spanish Creole'									Speak English as a 2nd Language (Less Than Very Well)	
		English Only		Asian Languages		Other		Total				
		%		%		%		%		%		
California	4,443,100	56%	2,270,800	29%	763,700	10%	422,000	5%	7,899,700	1,508,900	19%	
Fresno County	112,800	56%	67,400	33%	12,900	6%	8,100	4%	201,200	39,000	19%	
Fresno Metro Area												
Fresno (City)	55,700	58%	27,800	29%	9,000	9%	4,300	4%	96,700	17,500	18%	
Clovis	12,000	76%	2,000	13%	1,000	6%	800	5%	15,800	1,200	8%	
South County												
Fowler	600	60%	300	30%	100	10%	100	10%	1,000	200	20%	
Selma	2,800	42%	3,400	52%	0	0%	400	6%	6,600	1,700	26%	
Kingsburg	1,100	73%	300	20%	100	7%	100	7%	1,500	100	7%	
East County												
Reedley	3,200	38%	5,100	60%	100	1%	100	1%	8,500	2,800	33%	
Sanger	3,000	42%	4,000	56%	0	0%	0	0%	7,100	1,900	27%	
Orange Cove	800	25%	2,400	75%	0	0%	0	0%	3,200	1,300	41%	
Parlier	1,000	16%	5,400	84%	0	0%	0	0%	6,400	2,900	45%	
West County												
San Joaquin	100	6%	1,400	88%	0	0%	0	0%	1,600	700	44%	
Kerman	1,100	31%	2,100	60%	0	0%	200	6%	3,500	900	26%	
Firebaugh	700	18%	3,100	82%	0	0%	0	0%	3,800	1,800	47%	
Mendota	900	13%	5,700	85%	0	0%	0	0%	6,700	4,200	63%	
Coalinga	1,100	61%	700	39%	0	0%	0	0%	1,800	300	17%	
Huron	200	6%	3,100	94%	0	0%	0	0%	3,300	1,700	52%	

Data Source: U.S. Census American Community Survey; Headwaters Economics

Analysis: Wahlstrom & Associates

Table 5- Population by Ethnicity in CA and Fresno County, 2016

Geographic Area	Total Population	Hispanic or Latino of any race	Caucasian	African American	Asian	Other Ethnicity	Biracial or Multiple Ethnicities
California	39,256,000	14,988,500	15,371,200	2,223,300	5,220,900	375,400	1,076,800
Fresno County	985,000	504,400	311,700	47,100	93,900	8,000	19,800
Fresno Metro Area							
Fresno (City)	520,500	250,000	148,900	39,000	66,100	3,800	12,700
Clovis	108,000	29,800	60,300	2,900	11,300	1,300	2,400
South County							
Fowler	5,900	4,000	1,200	0	600	0	0
Selma	24,800	19,200	3,400	100	1,500	100	400
Kingsburg	12,100	5,000	6,100	0	700	100	200
East County							
Reedley	26,000	20,100	5,000	5,000	600	0	300
Sanger	26,000	21,200	3,900	300	300	100	200
Orange Cove	9,200	8,600	500	0	0	0	100
Parlier	15,300	14,800	300	100	100	0	0
West County							
San Joaquin	4,000	3,800	200	0	0	0	0
Kerman	14,400	11,000	2,500	0	800	100	100
Firebaugh	8,200	7,500	500	100	0	0	200
Mendota	11,800	11,600	100	0	100	0	0
Coalinga	16,700	8,900	5,800	1,000	400	200	400
Huron	6,900	6,800	100	100	0	0	0

Data Sources: U.S. Census American Community Survey; Headwaters Economics

Analysis: Wahlstrom & Associates

Table 6- Educational Attainment in California, Fresno County

	Not HS Graduate		HS Graduate, Some College or Associates Degree		Bachelor's degree		Professional or Advanced Degree		Total
		%		%		%		%	
California	4,746,800	19%	20,895,700	81%	5,022,600	20%	2,927,000	11%	25,642,500
Fresno County	156,400	27%	427,500	73%	76,300	13%	37,400	6%	583,900
Fresno Metro Area									
Fresno (City)	76,600	25%	226,800	75%	41,700	14%	19,200	6%	303,400
Clovis	7,400	11%	58,700	89%	12,900	20%	6,800	10%	66,100
South County									
Fowler	1,000	29%	2,400	71%	400	12%	100	3%	3,400
Selma	6,100	41%	8,600	59%	1,100	7%	300	2%	14,700
Kingsburg	1,200	16%	6,200	84%	1,300	18%	800	11%	7,400
East County									
Reedley	5,600	37%	9,400	63%	1,500	10%	700	5%	15,000
Sanger	5,700	38%	9,500	63%	1,300	9%	500	3%	15,200
Orange Cove	2,600	54%	2,200	46%	200	4%	0	0%	4,800
Parlier	4,500	56%	3,500	44%	300	4%	100	1%	8,000
West County									
San Joaquin	1,400	74%	500	26%	100	5%	0	0%	1,900
Kerman	3,300	41%	4,700	59%	500	6%	300	4%	8,000
Firebaugh	2,600	62%	1,600	38%	200	5%	0	0%	4,200
Mendota	4,300	67%	2,100	33%	100	2%	0	0%	6,400
Coalinga	2,900	28%	7,500	72%	800	8%	600	6%	10,400
Huron	2,500	74%	900	26%	0	0%	0	0%	3,400

Data Source: U.S. Census American Community Survey, Headwaters Economics

Analysis: Wahlstrom & Associates

Table 7- Average Household Income Trends CA, Fresno County and Cities

	Avg HH Income 2000	Avg HH Income 2010	Avg HH Income 2015	% State Total 2015	% Change 2000 - 10	% Change 2010 - 15
California	\$89,458	\$90,900	\$89,900		2%	-1%
Fresno County	\$65,713	\$67,500	\$65,300	73%	3%	-3%
Fresno Metro Area						
Fresno (City)	\$61,596	\$63,800	\$60,500	67%	4%	-5%
Clovis	\$71,568	\$85,400	\$83,600	93%	19%	-2%
South County						
Fowler	\$53,978	\$69,100	\$66,900	74%	28%	-3%
Selma	\$60,769	\$58,500	\$55,400	62%	-4%	-5%
Kingsburg	\$62,456	\$80,300	\$78,500	87%	29%	-2%
East County						
Reedley	\$58,603	\$64,700	\$61,900	69%	10%	-4%
Sanger	\$57,438	\$60,900	\$59,000	66%	6%	-3%
Orange Cove	\$44,598	\$42,900	\$39,400	44%	-4%	-8%
Parlier	\$43,812	\$48,500	\$45,100	50%	11%	-7%
West County						
San Joaquin	\$42,256	\$34,800	\$32,000	36%	-18%	-8%
Kerman	\$56,322	\$59,400	\$57,500	64%	5%	-3%
Firebaugh	\$51,128	\$48,500	\$45,100	50%	-5%	-7%
Mendota	\$41,308	\$37,400	\$34,000	38%	-9%	-9%
Coalinga	\$61,175	\$71,600	\$68,500	76%	17%	-4%
Huron	\$57,563	\$45,100	\$41,400	46%	-22%	-8%

Data Sources: U.S. Census 2000; American Community Survey of the U.S. Census, 2010 and 2014;
Headwaters Economics; Bureau of Labor Statistics Consumer Price Index

Analysis: Wahlstrom & Associates. Notes: Incomes are adjusted for inflation and measured in \$2015;
rounded to the nearest \$100; 2010 and 2015 incomes are American Community Survey estimates
rounded to the nearest \$100

Table 8- Household Income Distribution- Fresno County, Region and CA

	<\$35,000		\$35K to \$50K		\$50K to \$100K		\$100 to \$150		>\$150		Total
		%		%		%		%		%	
California	3,834,700	29%	1,579,100	12%	3,770,400	29%	1,940,200	15%	1,887,000	15%	13,011,400
4-County Region	211,400	40%	75,100	14%	147,900	28%	56,400	11%	34,500	7%	525,100
Kings County	15,000	37%	6,400	16%	12,000	29%	4,500	11%	2,800	7%	40,800
Madera County	16,700	38%	6,800	16%	12,900	30%	5,000	11%	2,200	5%	43,500
Tulare County	57,400	42%	20,400	15%	37,900	28%	13,600	10%	8,000	6%	137,200
Fresno County	122,300	40%	41,500	14%	85,100	28%	33,300	11%	21,500	7%	303,600
Metro Area	82,100	41%	26,900	13%	56,400	28%	21,800	11%	14,200	7%	201,400
Fresno (City)	71,900	44%	22,700	14%	44,400	27%	15,700	10%	10,000	6%	164,700
Clovis	10,200	28%	4,200	11%	12,000	33%	6,100	17%	4,200	11%	36,700
South County	4,800	38%	1,700	14%	4,100	33%	1,200	10%	600	5%	12,500
Fowler	700	41%	200	12%	500	29%	200	12%	100	6%	1,700
Selma	2,900	43%	1,100	16%	2,100	31%	600	9%	100	1%	6,800
Kingsburg	1,200	30%	400	10%	1,500	38%	400	10%	400	10%	4,000
East County	9,200	45%	3,200	16%	5,400	26%	2,000	10%	600	3%	20,500
Reedley	2,600	37%	1,200	17%	2,100	30%	800	11%	300	4%	7,100
Sanger	3,100	42%	1,000	14%	2,100	29%	800	11%	300	4%	7,300
Orange Cove	1,500	65%	200	9%	600	26%	100	4%	0	0%	2,300
Parlier	2,000	53%	800	21%	600	16%	300	8%	0	0%	3,800
West County	8,100	49%	2,300	14%	4,100	25%	1,500	9%	400	2%	16,400
San Joaquin	600	67%	100	11%	200	22%	0	0%	0	0%	900
Kerman	1,600	42%	500	13%	1,100	29%	400	11%	100	3%	3,800
Firebaugh	1,200	52%	300	13%	600	26%	200	9%	0	0%	2,300
Mendota	1,900	63%	400	13%	600	20%	100	3%	0	0%	3,000
Coalinga	1,700	36%	700	15%	1,300	28%	800	17%	300	6%	4,700
Huron	1,100	65%	300	18%	300	18%	0	0%	0	0%	1,700

Data Source: U.S. Census American Community Survey, Headwaters Economics

California Department of Finance Current Population Estimates Analysis: Wahlstrom & Associates

Table 9- Poverty Rate Trends in CA and Fresno County 2016

	Population 2016	People below poverty 2016		People < 18 years Below Poverty		People > 65 years Below Poverty		People > 18 and < 65 years Below Poverty	
			%		%		%		%
California	39,256,000	6,416,000	16%	2,295,000	36%	512,000	8%	3,609,000	56%
Fresno County	984,500	268,600	27%	123,600	46%	13,700	5%	131,300	49%
Fresno Metro Area									
Fresno (City)	520,500	159,200	31%	70,000	44%	6,800	4%	82,400	52%
Clovis	108,020	14,880	14%	6,060	41%	1,050	7%	7,770	52%
South County									
Fowler	5,910	1,450	25%	810	56%	30	2%	610	42%
Selma	24,810	6,610	27%	3,050	46%	460	7%	3,100	47%
Kingsburg	12,080	1,860	15%	660	35%	130	7%	1,080	58%
East County									
Reedley	25,960	6,450	25%	2,930	45%	200	3%	3,320	51%
Sanger	25,990	5,750	22%	2,400	42%	740	13%	2,620	46%
Orange Cove	9,170	4,540	50%	2,410	53%	120	3%	2,010	44%
Parlier	15,350	6,380	42%	3,120	49%	200	3%	3,060	48%
West County									
San Joaquin	4,010	2,120	53%	1,160	55%	90	4%	870	41%
Kerman	14,410	3,870	27%	1,960	51%	110	3%	1,800	47%
Firebaugh	8,240	3,200	39%	1,580	49%	110	3%	1,510	47%
Mendota	11,760	5,710	49%	2,660	47%	130	2%	2,920	51%
Coalinga	16,730	3,850	23%	2,000	52%	120	3%	1,740	45%
Huron	6,880	2,450	36%	1,130	46%	130	5%	1,190	49%

Data Source: U.S. Census American Community Survey, Headwaters Economics Analysis: Wahlstrom & Associates Notes: Federal Poverty Rates are determined by income and family size. The poverty thresholds are updated each year by the Census Bureau and are used mainly to estimate the number of Americans in poverty each year. Current guidelines consider a single person to be living in poverty if their income is less than \$11,880; family of two is considered to be living in poverty if they earn less than \$16,020; family of three threshold is \$20,160; family of four is \$24,300, etc.

Table 10- Home Value Trends- California, Fresno County and Cities

	Average Housing Value (Inflation adjusted)			Percent Change		% of California 2015	% of Fresno County 2015
	2006	2010	2015	2006 - 10	2010 - 15		
California	\$617,300	\$368,100	\$449,200	-40%	22%		
Fresno County	\$349,700	\$184,066	\$192,800	-47%	5%	43%	
Fresno Metro Area							
City of Fresno	\$340,400	\$164,500	\$188,300	-52%	14%	42%	98%
Clovis	\$465,000	\$255,000	\$282,200	-45%	11%	63%	146%
South County							
Fowler	\$334,400	\$180,000	\$228,200	-46%	27%	51%	118%
Selma	\$310,700	\$152,300	\$166,100	-51%	9%	37%	86%
Kingsburg	\$353,600	\$208,900	\$230,100	-41%	10%	51%	119%
East County							
Reedley	\$301,800	\$164,800	\$175,000	-45%	6%	39%	91%
Sanger	\$323,900	\$161,500	\$189,000	-50%	17%	42%	98%
Orange Cove	\$215,200	\$131,700	\$121,400	-39%	-8%	27%	63%
Parlier	\$251,400	\$113,400	\$136,800	-55%	21%	30%	71%
West County							
San Joaquin	\$203,800	\$113,400	\$122,800	-44%	8%	27%	64%
Kerman	\$309,800	\$153,500	\$184,800	-50%	20%	41%	96%
Firebaugh	\$248,000	\$127,300	\$123,900	-49%	-3%	28%	64%
Mendota	\$221,400	\$112,200	\$117,000	-49%	4%	26%	61%
Coalinga	\$265,000	\$160,000	\$145,500	-40%	-9%	32%	75%
Huron	\$182,800	\$142,500	\$136,300	-22%	-4%	30%	71%

Data Sources: Zillow.com

Analysis: Wahlstrom & Associates

Note: Data Adjusted for inflation measured in \$2015

Table 11- California Employment by Industry Trends: 2001 to 2015

TITLE	2001	2007	2010	2015	Annual Growth Rate 2001-07	Annual Growth Rate 2007-10	Annual Growth Rate 2010-15
Total Employment	15,096,100	15,794,600	14,593,000	16,474,900	0.8%	-2.6%	2.5%
Private Sector Employment	12,714,000	13,300,000	12,144,600	14,016,000	0.8%	-3.0%	2.9%
Total Farm	379,500	383,700	382,800	423,300	0.2%	-0.1%	2.0%
Mining, Logging, and Construction	806,000	919,300	586,600	756,400	2.2%	-13.9%	5.2%
Manufacturing	1,780,800	1,464,400	1,241,900	1,291,900	-3.2%	-5.3%	0.8%
Wholesale Trade	656,700	715,300	644,000	721,200	1.4%	-3.4%	2.3%
Retail Trade	1,575,900	1,689,900	1,517,700	1,663,100	1.2%	-3.5%	1.8%
Transportation, Warehousing & Utilities	514,100	507,700	466,200	554,000	-0.2%	-2.8%	3.5%
Information	551,900	471,100	429,000	483,000	-2.6%	-3.1%	2.4%
Finance, Insurance & Real Estate	829,700	896,600	760,200	797,400	1.3%	-5.4%	1.0%
Professional & Business Services	2,187,300	2,266,200	2,073,800	2,493,800	0.6%	-2.9%	3.8%
Educational & Health Services	1,567,800	1,913,200	2,056,000	2,456,200	3.4%	2.4%	3.6%
Leisure & Hospitality	1,365,100	1,560,400	1,501,500	1,830,000	2.3%	-1.3%	4.0%
Other Services	499,200	512,200	484,900	545,700	0.4%	-1.8%	2.4%
Government							
Federal Government	254,300	247,000	268,400	244,300	-0.5%	2.8%	-1.9%
State Government (not education)	260,100	268,200	265,100	263,500	0.5%	-0.4%	-0.1%
Local Government & Special Districts (not education)	719,300	800,800	778,500	780,100	1.8%	-0.9%	0.0%
Public Education	1,148,400	1,178,600	1,136,400	1,171,000	0.4%	-1.2%	0.6%

Data Sources: California Employment Development Department

Analysis: Wahlstrom & Associates

Table 12- Fresno County Employment by Industry Trends: 2001 to 2015

TITLE	2001	2007	2010	2015	Annual Growth Rate 2001-07	Annual Growth Rate 2007-10	Annual Growth Rate 2010-15
Total Employment	318,200	349,000	327,100	356,200	1.6%	-2.1%	1.7%
Private Sector Employment	267,000	297,900	276,500	303,100	1.8%	-2.5%	1.9%
Total Farm	48,700	48,100	46,000	47,300	-0.2%	-1.5%	0.6%
Mining, Logging, and Construction	16,200	21,200	12,200	15,200	4.6%	-16.8%	4.5%
Manufacturing	27,200	28,100	24,100	25,500	0.5%	-5.0%	1.1%
Wholesale Trade	12,000	13,500	11,500	13,800	2.0%	-5.2%	3.7%
Retail Trade	32,600	36,300	32,800	37,500	1.8%	-3.3%	2.7%
Transportation, Warehousing & Utilities	9,200	10,700	10,800	12,200	2.5%	0.3%	2.5%
Information	5,100	4,200	3,600	3,900	-3.2%	-5.0%	1.6%
Finance, Insurance & Real Estate	17,000	19,500	18,400	13,000	2.3%	-1.9%	-6.7%
Professional & Business Services	25,600	30,500	31,200	31,400	3.0%	0.8%	0.1%
Educational & Health Services	37,600	46,600	49,100	60,400	3.6%	1.8%	4.2%
Leisure & Hospitality	24,500	28,200	26,800	31,400	2.4%	-1.7%	3.2%
Other Services	11,300	11,000	10,000	11,500	-0.4%	-3.1%	2.8%
Government							
Federal Government	11,800	9,600	10,700	9,600	-3.4%	3.7%	-2.1%
State Government (not education)	5,900	7,100	7,500	8,300	3.1%	1.8%	2.0%
Local Government & Special Districts (not education)	16,500	18,100	16,500	15,800	1.6%	-3.0%	-0.9%
Public Education	17,000	16,300	15,900	19,400	-0.7%	-0.8%	4.1%

Data Sources: California Employment Development Department

Analysis: Wahlstrom & Associates

Table 13- Regional Employment by Industry Trends: 2001 to 2015

TITLE	2001	2007	2010	2015	Annual Growth Rate 2001-07	Annual Growth Rate 2007-10	Annual Growth Rate 2010-15
Total Employment	531,000	599,100	566,100	612,300	2.0%	-1.9%	1.6%
Private Sector Employment	428,800	483,900	451,700	498,800	2.0%	-2.3%	2.0%
Total Farm	98,600	102,800	100,500	104,400	0.7%	-0.8%	0.8%
Mining, Logging, and Construction	24,600	32,500	18,100	22,500	4.8%	-17.7%	4.4%
Manufacturing	45,200	47,700	42,300	46,200	0.9%	-3.9%	1.8%
Wholesale Trade	16,900	18,700	16,500	19,100	1.7%	-4.1%	3.0%
Retail Trade	52,800	60,000	54,700	62,700	2.2%	-3.0%	2.8%
Transportation, Warehousing & Utilities	15,700	17,800	17,500	20,900	2.1%	-0.6%	3.6%
Information	7,000	6,100	5,300	5,500	-2.3%	-4.6%	0.7%
Finance, Insurance & Real Estate	23,200	25,900	23,800	18,900	1.9%	-2.8%	-4.5%
Professional & Business Services	37,500	44,400	44,200	45,200	2.9%	-0.2%	0.4%
Educational & Health Services	54,900	69,800	73,600	88,000	4.1%	1.8%	3.6%
Leisure & Hospitality	36,700	42,700	40,900	48,800	2.6%	-1.4%	3.6%
Other Services	15,700	15,500	14,300	16,600	-0.2%	-2.7%	3.0%
Government							
Federal Government	13,100	12,400	13,800	12,100	-0.9%	3.6%	-2.6%
State Government (not education)	18,100	25,500	25,900	24,200	5.9%	0.5%	-1.3%
Local Government & Special Districts (not education)	33,000	38,500	36,600	35,200	2.6%	-1.7%	-0.8%
Public Education	38,000	38,800	38,100	42,000	0.3%	-0.6%	2.0%

Data Sources: California Employment Development Department

Analysis: Wahlstrom & Associates

Note: Region includes the Counties of Fresno, Tulare, Madera and Kings

Table 14- Fresno County, Southern San Joaquin Valley and California: 2001 - 2014

	Value of Fruits, Vegetables, Nursery Products and Field Crops (\$ 000's)				Annual Change in Production		
	2001	2006	2009	2014	2001 - 2006	2006 - 2009	2009 - 2014
California	24,749,864	27,862,174	29,511,662	36,960,462	2.4%	1.9%	4.6%
Fresno County	3,227,909	4,461,821	4,670,095	5,139,087	6.7%	1.5%	1.9%
Tulare County	2,419,603	2,461,935	2,558,358	4,456,596	0.3%	1.3%	11.7%
Madera County	582,137	879,984	747,414	1,951,252	8.6%	-5.3%	21.2%
Kings County	626,828	833,314	816,262	1,291,693	5.9%	-0.7%	9.6%
Four County Region	6,856,477	8,637,054	8,792,129	12,838,628	4.7%	0.7%	7.9%

	Value of Livestock and Poultry Products (\$ 000's)				Annual Change of Production Value		
	2001	2006	2009	2014	2001 - 2006	2006 - 2009	2009 - 2014
California	\$9,886,745	\$9,037,008	\$8,585,238	\$15,317,425	-1.8%	-1.7%	12.3%
Fresno County	\$1,076,518	\$1,228,459	\$1,261,190	\$1,900,774	2.7%	0.9%	8.6%
Tulare County	\$2,250,962	\$2,084,969	\$1,907,596	\$3,628,076	-1.5%	-2.9%	13.7%
Madera County	\$289,140	\$333,981	\$315,932	\$564,634	2.9%	-1.8%	12.3%
Kings County	\$645,678	\$680,488	\$623,781	\$1,180,053	1.1%	-2.9%	13.6%
Four County Region	\$4,262,298	\$4,327,897	\$4,108,499	\$7,273,537	.03%	-1.7%	20.6%

Data Sources: Department of Agriculture Crop Reports: 2001, 2006, 2009 and 2014

Analysis: Wahlstrom & Associates

Notes: Value of production numbers are adjusted for inflation and measured in \$2014

Does not include timber harvest

2014 is the most recently available data for all counties and California

Table 15- Fresno County, Southern San Joaquin Valley and California: 2000 - 2014

Geographic Location	Employment Generated by Visitor Spending				Total Direct Visitor Spending (\$000s)				Industry Earnings Generated by Visitor Spending (\$000s)			
	2000	2010	2014	2015	2000	2010	2014	2015	2000	2010	2014	2015
California	901,700	896,500	1,026,100	1,063,600	\$71,900,000	\$92,400,000	\$108,500,000	\$111,900,000	\$24,300,000	\$30,600,000	\$38,100,000	\$41,300,000
Four County Region	18,500	20,500	23,810	24,250	\$1,197,900	\$1,631,900	\$1,868,300	\$1,918,000	\$336,300	\$499,600	\$605,900	\$655,600
Counties												
Fresno County	10,860	12,350	13,750	14,130	\$741,000	\$995,000	\$1,124,000	\$1,159,000	\$202,000	\$299,000	\$354,000	\$382,000
Tulare County	3,650	4,050	4,780	4,960	\$214,000	\$313,100	\$370,700	\$377,000	\$64,100	\$101,000	\$123,400	\$135,900
Madera County	2,290	2,430	3,490	3,290	\$143,400	\$201,900	\$243,600	\$251,200	\$42,500	\$63,700	\$87,000	\$91,900
Kings County	1,700	1,670	1,790	1,870	\$99,500	\$121,900	\$130,000	\$130,800	\$27,700	\$35,900	\$41,500	\$45,800

Geographic Region	Employment Annual Growth Rates			Visitor Spending Annual Growth Rates			Industry Earnings Annual Growth Rates		
	2000 - 2010	2010 - 2014	2014-2015	2000 - 2010	2010 - 2014	2014-2015	2000 - 2010	2010 - 2014	2014-2015
California	-0.1%	3.4%	3.7%	2.5%	4.1%	3.1%	2.3%	5.6%	8.4%
Four County Region	1.0%	3.8%	1.8%	3.1%	3.4%	2.7%	4.0%	4.9%	8.2%
Counties									
Fresno County	1.3%	2.7%	2.8%	3.0%	3.1%	3.1%	4.0%	4.3%	7.9%
Tulare County	1.0%	4.2%	3.8%	3.9%	4.3%	1.7%	4.7%	5.1%	10.1%
Madera County	0.6%	9.5%	-5.7%	3.5%	4.8%	3.1%	4.1%	8.1%	5.6%
Kings County	-0.2%	1.7%	4.5%	2.1%	1.6%	0.6%	2.6%	3.7%	10.4%

Data Sources: California Travel Impacts 1992-2015p. Dean Runyan Associates and Visit California. (2016, April) Analysis: Wahlstrom & Associates

Notes: (1) Visitor spending and industry earning values are in \$2015

(2) Red numbers represent negative values

Table 16- Fresno County Detailed Industry Trends 2010-15

INDUSTRY AND EMPLOYMENT	2010 (1)	2015 (2)	% of		Share of	Share of	
			Change 2010	2015 (4)	Regional	Regional	State
			- 2015 (3)		2013 (5)	2010-2013 (6) (7)	Growth 2010-2013
Total Employment	334,100	371,800	37,700	59.8%	2.3%	68.2%	2.0%
Total Private Sector Employment	223,500	255,800	32,300	64.9%	1.9%	65.4%	1.7%
Total Farm							
Crop Production	17,200	15,530	-1,670	52.6%	8.5%	N/A	N/A
Animal Production	1,880	2,080	200	17.9%	7.0%	-18.9%	N/A
Agricultural Support Activities	26,860	29,700	2,840	47.0%	14.0%	-150.3%	7.9%
Mining, Logging, and Construction							
Mining and Logging	200	300	100	68.2%	1.0%	22.7%	4.3%
Construction	12,000	14,900	2,900	67.5%	2.0%	13.1%	1.7%
Manufacturing							
Food Man & Beverage & Tobacco	12,300	13,000	700	52.3%	6.2%	35.2%	3.5%
Wood Product Manufacturing	850	640	-210	52.5%	2.9%	N/A	N/A
Paper Manufacturing	600	890	290	47.3%	4.1%	14.6%	N/A
Printing and Related Support Activities	690	410	-280	36.9%	1.0%	N/A	9.3%
Chemical & Petroleum Manufacturing	610	110	-500	31.4%	0.1%	N/A	N/A
Plastics and Rubber Products Manufacturing	510	560	50	34.4%	1.3%	2.5%	25.0%
Nonmetallic Mineral Product Manufacturing	670	480	-190	69.6%	1.5%	N/A	N/A
Primary Metal Manufacturing	170	70	-100	11.1%	0.4%	N/A	N/A
Fabricated Metal Product Manufacturing	1,840	1,670	-170	55.3%	1.3%	N/A	N/A
Machinery Manufacturing	1,960	2,370	410	74.1%	3.2%	20.6%	6.9%
Computer and Electronic Product Manufacturing	1,300	1,470	170	70.7%	0.6%	8.5%	N/A
Other Manufacturing	2,130	3,830	1,700	78.0%	1.2%	85.4%	11.8%
Wholesale Trade							
Motor Vehicle Parts and Supplies Merchant Whslrs	920	1,100	180	87.3%	2.9%	120.0%	3.8%
Furniture and Home Furnishing Merchant Wholesalers	60	80	20	88.9%	0.4%	N/A	0.6%
Lumber, Other Construction Materials Merchant Whslrs	150	190	40	63.3%	0.9%	N/A	1.2%
Professional, Commercial Equipt. and Supplies Whslrs	230	280	50	44.4%	0.3%	29.4%	0.9%
Electrical and Electronic Goods Merchant Wholesalers	240	290	50	60.4%	0.6%	31.2%	1.2%
Plumbing and Heating Equipment Wholesalers	380	450	70	77.6%	1.8%	100.0%	3.7%
Machinery, Equipment, Supplies Merchant Whslrs	1,530	1,840	310	68.7%	3.5%	206.8%	4.6%
Paper and Paper Product Merchant Wholesalers	310	380	70	90.5%	2.7%	175.0%	14.0%
Apparel, Piece Goods, and Notions Merchant Whslrs	100	110	10	68.8%	0.3%	25.0%	0.1%
Grocery and Related Product Merchant Wholesalers	3,060	3,670	610	81.9%	3.6%	119.6%	7.3%
Chemical and Allied Products Merchant Wholesalers	190	230	40	79.3%	1.8%	80.0%	2.7%
Wholesale Electronic Markets and Agents and Brokers	1,060	1,280	220	70.7%	1.2%	95.7%	1.6%
Misc Wholesale	3,270	3,900	630	65.9%	2.4%	60.6%	4.6%
Retail Trade							
	32,800	37,500	4,700	59.8%	2.3%	58.8%	3.2%
Transportation, Warehousing & Utilities							
Utilities	1,900	2,200	300	67.9%	3.7%	75.0%	17.6%
Air Transportation	700	500	-200	90.9%	1.2%	N/A	N/A
Truck & Other Ground Transportation	4,080	4,480	400	62.5%	4.3%	46.5%	23.5%
Transit and Ground Passenger Transportation	580	600	20	34.9%	1.5%	10.5%	1.2%
Support Activities for Transportation	840	2,130	1,290	81.6%	2.6%	92.8%	75.9%
Couriers and Messengers	1,260	1,140	-120	68.7%	1.8%	N/A	N/A
Warehousing and Storage	1,420	1,150	-270	30.3%	1.6%	N/A	N/A

INDUSTRY AND EMPLOYMENT	2010 (1)	2015 (2)	% of Employment Change 2010-2015 (3)	% of Regional Employment 2015 (4)	% of State Employment 2013 (5)	Share of Regional Growth 2010-2013 (6)	Share of State Growth 2010-2013 (7)
Information	3,600	3,900		70.9%	0.8%		
Publishing Industries (except Internet)	700	530	-170	60.9%	0.6%	N/A	N/A
Motion Picture and Sound Recording Industries	350	300	-50	61.2%	0.2%	N/A	N/A
Broadcasting (except Internet)	1,090	1,380	290	86.8%	3.3%	138.1%	N/A
Telecommunications	1,290	1,460	170	64.0%	1.7%	68.0%	N/A
Other Information Services	190	400	210	97.6%	0.3%	262.5%	0.4%
Financial Activities							
Finance	4,950	4,540	-410	67.4%	1.4%	N/A	N/A
Insurance Carriers and Related Activities	3,890	4,190	300	71.0%	2.2%	58.8%	1.9%
Real Estate Rental & Leasing	4,560	4,260	-300	68.2%	1.6%	N/A	N/A
Professional & Technical Services	26,700	31,400	4,700	69.5%	0.4%		
Legal Services	6,130	7,210	1,080	76.4%	0.8%	100.9%	27.7%
Accounting, Tax Prep, Bookkeeping, and Payroll Svc	4,680	5,500	820	63.8%	0.7%	91.1%	6.3%
Architectural, Engineering, and Related Services	4,660	5,480	820	70.9%	0.5%	85.4%	6.6%
Specialized Design Services	180	210	30	56.8%	0.1%	33.3%	0.8%
Computer Systems Design and Related Services	1,770	2,080	310	82.5%	0.1%	147.6%	0.4%
Management, Scientific, Technical Consulting Svcs	4,460	5,240	780	62.8%	0.4%	57.8%	2.0%
Scientific Research and Development Services	610	720	110	61.0%	0.1%	57.9%	0.6%
Advertising, Public Relations, and Related Services	1,910	2,250	340	87.5%	0.5%	106.3%	3.9%
Other Professional, Scientific, and Technical Services	2,290	2,690	400	61.6%	0.6%	105.3%	6.2%
Other Business Services							
Management of Companies and Enterprises	2,100	2,100	0	67.5%	0.9%	N/A	N/A
Administrative and Support	14,200	19,000	4,800	71.0%	1.8%	68.7%	2.5%
Educational & Health Services							
Private Education Services	4,800	4,000	-800	71.6%	1.2%	N/A	N/A
Health Care	27,400	31,700	4,300	57.6%	2.2%	71.4%	2.7%
Social Assistance	15,600	19,600	4,000	71.6%	2.8%	61.7%	3.4%
Leisure & Hospitality							
Arts, Entertainment & Recreation	3,350	3,460	110	72.8%	0.7%	364.9%	0.1%
Accommodation	2,080	1,980	-100	56.6%	0.9%	N/A	N/A
Food Services & Drinking Places	21,380	25,960	4,580	64.0%	2.0%	58.9%	1.8%
Other Services	10,000	11,500	1,500	69.3%	2.1%	65.2%	2.5%
Government							
Federal Government	10,700	9,600	-1,100	79.3%	3.9%	N/A	N/A
State Government (not education)	7,500	8,300	800	46.6%	3.1%	N/A	N/A
Local Government & Special Districts (not ed.)	16,500	15,800	-700	35.8%	2.0%	N/A	N/A
Public Education	32,400	35,100	2,700	60.8%	3.0%	117.4%	7.8%

Data Sources: California Employment Development Department

Analysis: Wahlstrom & Associates

Notes: N/A means that numbers in columns 6 and 7 cannot be calculated because Fresno County employment declined between 2010 and 2013. Columns 6 and 7 numbers with 100% means that local employment expanded while regional employment declined.

Table 17- Fresno County Industry Location Quotients and Shift-Share Trends: 2010 - 2015

INDUSTRY AND EMPLOYMENT	2010	2015	Empl. Change 2010 - 2015	Regional Location Quotient 2015	State Location Quotient 2015	Regional Growth Shift-Share 2010-2015	State Growth Shift-Share 2010-2015	Avg. Fresno County Wage
Total Employment	334,100	371,800	37,700	1.00	1.00	0.09	1.00	\$35,800
Total Private Sector Employment (Non-Farm)	223,500	255,800	32,300	1.12	0.83	0.12	0.87	
Total Farm								
Crop Production	17,200	15,530	-1,670	0.88	3.78	N/A	N/A	\$27,100
Animal Production	1,880	2,080	200	0.30	3.12	N/A	N/A	
Agricultural Support Activities	26,860	29,700	2,840	0.78	6.22	N/A	3.96	\$23,200
Mining, Logging, and Construction								
Mining and Logging	200	300	100	1.14	0.46	0.33	2.17	
Construction	12,000	14,900	2,900	1.13	0.91	0.19	0.86	\$47,000
Manufacturing	24,100	25,500	1,400	0.92	0.87	0.04	1.46	
Food Man & Beverage & Tobacco	12,300	13,000	700	0.87	2.76	0.04	1.76	\$35,800
Wood Product Manufacturing	850	640	-210	0.88	1.27	-0.25	N/A	
Paper Manufacturing	600	890	290	0.79	1.80	0.23	N/A	
Printing and Related Support Activities	690	410	-280	0.62	0.43	N/A	4.66	
Chemical & Petroleum Manufacturing	610	110	-500	0.53	0.04	-2.10	N/A	
Plastics and Rubber Products Manufacturing	510	560	50	0.57	0.56	0.04	12.48	
Nonmetallic Mineral Product Manufacturing	670	480	-190	1.16	0.68	-0.40	N/A	
Primary Metal Manufacturing	170	70	-100	0.19	0.17	-0.23	9.98	
Fabricated Metal Product Manufacturing	1,840	1,670	-170	0.92	0.56	-0.08	N/A	
Machinery Manufacturing	1,960	2,370	410	1.24	1.42	0.19	3.47	\$53,500
Computer and Electronic Product Manufacturing	1,300	1,470	170	1.18	0.24	0.12	N/A	\$60,300
Other Manufacturing	2,130	3,830	1,700	1.30	0.55	0.51	5.89	
Wholesale Trade	11,500	13,800	2,300	1.21	0.85	0.18	1.49	\$45,000
Motor Vehicle Parts and Supplies Merchant Wholesalers	920	1,100	180	1.46	1.27	0.21	1.91	
Furniture and Home Furnishing Merchant Wholesalers	60	80	20	1.49	0.18	N/A	0.30	
Lumber and Other Construction Materials Merchant Whslrs	150	190	40	1.06	0.41	N/A	0.60	
Professional and Commercial Equipment and Supplies	230	280	50	0.74	0.15	0.12	0.44	
Electrical and Electronic Goods Merchant Wholesalers	240	290	50	1.01	0.27	0.15	0.61	
Plumbing and Heating Equipment Wholesalers	380	450	70	1.30	0.80	0.18	1.84	
Machinery, Equipment, and Supplies Merchant Wholesalers	1,530	1,840	310	1.15	1.54	0.17	2.27	\$53,500
Paper and Paper Product Merchant Wholesalers	310	380	70	1.51	1.19	0.24	6.99	
Apparel, Piece Goods, and Notions Merchant Wholesalers	100	110	10	1.15	0.12	0.09	0.05	
Grocery and Related Product Merchant Wholesalers	3,060	3,670	610	1.37	1.58	0.20	3.63	\$46,600
Chemical and Allied Products Merchant Wholesalers	190	230	40	1.33	0.79	0.20	1.33	
Wholesale Electronic Markets and Agents and Brokers	1,060	1,280	220	1.18	0.54	0.18	0.78	\$53,500
Misc Wholesale	3,270	3,900	630	1.10	1.08	0.16	2.30	
Retail Trade	32,800	37,500	4,700	1.00	1.00	0.11	1.61	
Transportation, Warehousing & Utilities								
Utilities	1,900	2,200	300	1.13	1.64	0.14	8.81	
Air Transportation	700	500	-200	1.52	0.52	-0.53	N/A	
Truck & Other Ground Transportation	4,080	4,480	400	1.04	1.88	0.08	3.27	\$40,400
Transit and Ground Passenger Transportation	580	600	20	0.58	0.68	0.02	0.50	\$41,600
Support Activities for Transportation	840	2,130	1,290	1.36	1.14	0.72	8.82	
Couriers and Messengers	1,260	1,140	-120	1.15	0.81	-0.11	30.07	
Warehousing and Storage	1,420	1,150	-270	0.51	0.71	N/A	N/A	

Continued

INDUSTRY AND EMPLOYMENT	2010	2015	Empl. Change 2010 - 2015	Regional Location Quotient 2015	State Location Quotient 2015	Regional Growth Shift-Share 2010-2015	State Growth Shift-Share 2010-2015	Avg. Fresno County Wage
Information	3,600	3,900	300	1.19	0.36	0.08	0.28	
Publishing Industries (except Internet)	700	530	-170	1.02	0.25	-0.29	N/A	
Motion Picture and Sound Recording Industries	350	300	-50	1.02	0.09	N/A	N/A	
Broadcasting (except Internet)	1,090	1,380	290	1.45	1.46	0.27	N/A	\$112,400
Telecommunications	1,290	1,460	170	1.07	0.77	0.11	N/A	
Other Information Services	190	400	210	1.63	0.15	0.75	0.18	
Financial Activities								
Finance	4,950	4,540	-410	1.13	0.61	-0.09	N/A	
Insurance Carriers and Related Activities	3,890	4,190	300	1.19	0.95	0.07	0.92	
Real Estate Rental & Leasing	4,560	4,260	-300	1.14	0.70	-0.07	N/A	
Professional & Technical Services	26,700	31,400	4,700	1.16	1.15	0.15	1.22	
Legal Services	6,130	7,210	1,080	1.28	2.37	0.17	13.82	\$71,000
Accounting, Tax Preparation, Bookkeeping, Payroll Svs	4,680	5,500	820	1.07	1.96	0.14	3.15	\$47,100
Architectural, Engineering, and Related Services	4,660	5,480	820	1.18	1.43	0.16	3.30	\$59,900
Specialized Design Services	180	210	30	0.95	0.41	0.12	0.42	
Computer Systems Design and Related Services	1,770	2,080	310	1.38	0.32	0.18	0.18	
Management, Scientific, and Technical Consulting Services	4,460	5,240	780	1.05	1.16	0.14	0.98	\$58,600
Scientific Research and Development Services	610	720	110	1.02	0.23	0.14	0.31	
Advertising, Public Relations, and Related Services	1,910	2,250	340	1.46	1.53	0.19	1.93	\$23,100
Other Professional, Scientific, and Technical Services	2,290	2,690	400	1.03	1.75	0.13	3.12	
Other Business Services								
Management of Companies and Enterprises	2,100	2,100	0	1.13	0.40	N/A	N/A	
Administrative and Support	14,200	19,000	4,800	1.19	0.80	0.26	1.24	
Educational & Health Services								
Private Education Services	4,800	4,000	-800	1.20	0.51	-0.21	N/A	
Health Care	27,400	31,700	4,300	0.96	0.99	0.11	1.34	
Social Assistance	15,600	19,600	4,000	1.20	1.25	0.21	1.70	
Leisure & Hospitality								
Arts, Entertainment & Recreation	3,350	3,460	110	1.22	0.31	0.03	0.07	
Accommodation	2,080	1,980	-100	0.95	0.40	N/A	N/A	
Food Services & Drinking Places	21,380	25,960	4,580	1.07	0.87	0.17	0.87	
Other Services	10,000	11,500	1,500	1.16	0.93	0.13	1.23	
Government								
Federal Government	10,700	9,600	-1,100	1.33	1.74	-0.13	2.28	
State Government (not education)	7,500	8,300	800	0.78	1.40	N/A	N/A	
Local Government & Special Districts (not education)	16,500	15,800	-700	0.60	0.90	-0.02	1.37	
Public Education	32,400	35,100	2,700	1.02	1.33	0.07	3.89	

Data Sources: California Employment Development Department and Minnesota IMPLAN Group ES202 files. Analysis: Wahlstrom & Associates

Note: N/A is applied to any sector with negative growth in Fresno County or if negative growth in the region State of California

Table 18- Employment Trends in the City of Fresno and Fresno County, 2010 - 2014

Industry Sector	Fresno Jobs 2010	Fresno Jobs 2014	Fresno Job Growth 2010-2014	Fresno Percent Change 2010-2014	Fresno Percent of Total 2014	Fresno County Jobs 2014	Fresno's share of County Jobs 2014
Agriculture (not crop production)	280	380	100	36%	0%	2,750	14%
Oil, Gas & Mining	90	80	-10	-11%	0%	230	35%
Utilities	1,140	1,140	0	0%	1%	2,920	39%
Construction	9,150	9,430	280	3%	5%	13,470	70%
Manufacturing	15,790	14,630	-1,160	-7%	8%	23,170	63%
Wholesale Trade	10,450	11,540	1,090	10%	7%	15,280	76%
Retail Trade	22,900	23,730	830	4%	14%	35,920	66%
Transportation & Warehouse	6,640	6,020	-620	-9%	3%	8,590	70%
Information Services	3,620	3,270	-350	-10%	2%	4,020	81%
Financial & Insurance	8,760	7,350	-1,410	-16%	4%	8,710	84%
Real Estate	3,510	3,530	20	1%	2%	4,480	79%
Professional, Scientific & Tech Svc	8,220	9,230	1,010	12%	5%	11,090	83%
Management of Companies	900	2,170	1,270	141%	1%	2,260	96%
Administrative Support	11,170	14,500	3,330	30%	8%	17,910	81%
Educational Services	4,650	5,650	1,000	22%	3%	6,790	83%
Health Care & Social Assistance	30,380	31,520	1,140	4%	18%	41,610	76%
Arts & Entertainment	4,050	4,510	460	11%	3%	5,730	79%
Accommodations & Food Services	15,930	16,990	1,060	7%	10%	26,550	64%
Other Services	8,370	8,840	470	6%	5%	12,910	68%
Total Employment	166,000	174,510	8,510	5%		244,390	71%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Note: Data includes employment located within zip codes 93650, 93701, 93702, 93703, 93704, 93705, 93706, 93707, 93708, 93709, 93710. 2) Totals are estimates based on reported establishment counts by firm size Analysis: Wahlstrom & Associates

Table 19- Employment Trends in the City of Clovis, 2010 - 2014

Industry Sector	Clovis Jobs 2010	Clovis Jobs 2014	Clovis Job Growth 2010-2014	Clovis Percent Change 2010-2014	Clovis Percent of Total 2014	Fresno County Jobs 2014	Clovis share of County Jobs 2014
Agriculture (not crop production)	40	10	-30	-75%	0%	2,750	0%
Oil, Gas & Mining	10	10	0	0%	0%	230	0%
Utilities	0	0	0	0%	0%	2,920	0%
Construction	2,070	2,480	410	20%	9%	13,470	1%
Manufacturing	1,700	2,190	490	29%	8%	23,170	1%
Wholesale Trade	200	390	190	95%	1%	15,280	0%
Retail Trade	5,100	6,370	1,270	25%	22%	35,920	3%
Transportation & Warehouse	330	360	30	9%	1%	8,590	0%
Information Services	390	420	30	8%	1%	4,020	0%
Financial & Insurance	590	690	100	17%	2%	8,710	0%
Real Estate	360	450	90	25%	2%	4,480	0%
Professional, Scientific & Tech Svc	1,020	1,170	150	15%	4%	11,090	0%
Management of Companies	40	20	-20	-50%	0%	2,260	0%
Administrative Support	1,350	2,430	1,080	80%	8%	17,910	1%
Educational Services	500	560	60	12%	2%	6,790	0%
Health Care & Social Assistance	3,360	3,870	510	15%	13%	41,610	2%
Arts & Entertainment	320	630	310	97%	2%	5,730	0%
Accommodations & Food Services	3,400	4,330	930	27%	15%	26,550	2%
Other Services	1,750	2,380	630	36%	8%	12,910	1%
Total Employment	22,530	28,760	6,230	28%		244,390	12%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93611, 93612, 93613 and 93619. Not the City Limits. 2) Totals are estimates based on reported establishment counts by firm size Analysis: Wahlstrom & Associates

Table 20- Employment Trends in the City of Fowler, 2010 - 2014

Industry Sector	Fowler Jobs 2010	Fowler Jobs 2014	Fowler Job Growth 2010-2014	Fowler Percent Total 2014	Fowler Percent Change 2010-2014	Fresno County jobs 2014	Fowler share of County Jobs 2014
Agriculture (not crop production)	480	30	-450	2%	-94%	2,750	1.1%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	0	0	0	0%	0%	2,920	0.0%
Construction	120	80	-40	4%	-33%	13,470	0.6%
Manufacturing	700	600	-100	32%	-14%	23,170	2.6%
Wholesale Trade	140	240	100	13%	71%	15,280	1.6%
Retail Trade	160	180	20	10%	13%	35,920	0.5%
Transportation & Warehouse	170	200	30	11%	18%	8,590	2.3%
Information Services	0	10	10	1%	100%	4,020	0.2%
Financial & Insurance	20	20	0	1%	0%	8,710	0.2%
Real Estate	20	20	0	1%	0%	4,480	0.4%
Professional, Scientific & Tech Svc	0	10	10	1%	100%	11,090	0.1%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support and Waste Management and Remediation Services	20	120	100	6%	500%	17,910	0.7%
Educational Services	30	40	10	2%	33%	6,790	0.6%
Health Care & Social Assistance	180	130	-50	7%	-28%	41,610	0.3%
Arts & Entertainment	0	10	10	1%	100%	5,730	0.2%
Accommodations & Food Services	60	130	70	7%	117%	26,550	0.5%
Other Services	30	60	30	3%	100%	12,910	0.5%
Total Employment	2130	1,880	-250		-12%	244,390	0.8%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93625. 2) Totals are estimates based on reported establishment counts by firm size
Analysis: Wahlstrom & Associates

Table 21- Employment Trends in the City of Selma, 2010 - 2014

Industry Sector	Selma Jobs 2010	Selma Jobs 2014	Selma Job Growth 2010-2014	Selma Percent Total 2014	Selma Percent Change 2010-2014	Fresno County Jobs 2014	Selma share of County Jobs 2014
Agriculture (not crop production)	250	10	-240	0%	-96%	2,750	0%
Oil, Gas & Mining	0	0	0	0%	0%	230	0%
Utilities	10	10	0	0%	0%	2,920	0%
Construction	310	230	-80	4%	-26%	13,470	2%
Manufacturing	1,130	1,120	-10	17%	-1%	23,170	5%
Wholesale Trade	450	960	510	15%	113%	15,280	6%
Retail Trade	1,210	1,540	330	24%	27%	35,920	4%
Transportation & Warehouse	150	270	120	4%	80%	8,590	3%
Information Services	40	20	-20	0%	-50%	4,020	0%
Financial & Insurance	110	100	-10	2%	-9%	8,710	1%
Real Estate	70	80	10	1%	14%	4,480	2%
Professional, Scientific & Tech Svc	90	90	0	1%	0%	11,090	1%
Management of Companies	30	10	-20	0%	-67%	2,260	0%
Administrative Support	90	100	10	2%	11%	17,910	1%
Educational Services	20	10	-10	0%	-50%	6,790	0%
Health Care & Social Assistance	890	840	-50	13%	-6%	41,610	2%
Arts & Entertainment	10	60	50	1%	500%	5,730	1%
Accommodations & Food Services	650	780	130	12%	20%	26,550	3%
Other Services	140	240	100	4%	71%	12,910	2%
Total Employment	5,650	6,470	820		15%	244,390	3%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93662. 2) Totals are estimates based on reported establishment counts by firm size
Analysis: Wahlstrom & Associates

Table 22- Employment Trends in the City of Kingsburg, 2010 - 2014

Industry Sector	Kingsburg Jobs 2010	Kingsburg Jobs 2014	Kingsburg Job Growth 2010-2014	Kingsburg Percent Change 2010-2014	Kingsburg Percent Total 2014	Fresno County jobs 2014	Kingsburg share of County Jobs 2014
Agriculture (not crop production)	260	170	-90	-35%	5%	2,750	6.2%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	0	0	0	0%	0%	2,920	0.0%
Construction	100	120	20	20%	3%	13,470	0.9%
Manufacturing	1,280	1330	50	4%	37%	23,170	5.7%
Wholesale Trade	70	110	40	57%	3%	15,280	0.7%
Retail Trade	480	470	-10	-2%	13%	35,920	1.3%
Transportation & Warehouse	190	200	10	5%	5%	8,590	2.3%
Information Services	0	0	0	0%	0%	4,020	0.0%
Financial & Insurance	100	100	0	0%	3%	8,710	1.1%
Real Estate	40	40	0	0%	1%	4,480	0.9%
Professional, Scientific & Tech Svc	390	80	-310	-79%	2%	11,090	0.7%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support	70	50	-20	-29%	1%	17,910	0.3%
Educational Services	10	10	0	0%	0%	6,790	0.1%
Health Care & Social Assistance	330	250	-80	-24%	7%	41,610	0.6%
Arts & Entertainment	30	40	10	33%	1%	5,730	0.7%
Accommodations & Food Services	380	500	120	32%	14%	26,550	1.9%
Other Services	130	170	40	31%	5%	12,910	1.3%
Total Employment	3,860	3,640	-220	-5.7%		244,390	1.5%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93631. 2) Totals are estimates based on reported establishment counts by firm size
Analysis: Wahlstrom & Associates

Table 23- Employment Trends in the City of Reedley, 2010 - 2014

Industry Sector	Reedley Jobs 2010	Reedley Jobs 2014	Reedley Job Growth 2010-2014	Reedley Percent Change 2010-2014	Reedley Percent Total 2014	Fresno County Jobs 2014	Reedley share of County Jobs 2014
Agriculture (not crop production)	170	400	230	135%	7%	2,750	7.4%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	0	0	0	0%	0%	2,920	0.0%
Construction	150	160	10	7%	3%	13,470	3.0%
Manufacturing	490	430	-60	-12%	8%	23,170	8.0%
Wholesale Trade	270	360	90	33%	7%	15,280	6.7%
Retail Trade	630	680	50	8%	13%	35,920	12.7%
Transportation & Warehouse	420	530	110	26%	10%	8,590	9.9%
Information Services	30	30	0	0%	1%	4,020	0.6%
Financial & Insurance	130	160	30	23%	3%	8,710	3.0%
Real Estate	60	60	0	0%	1%	4,480	1.1%
Professional, Scientific & Tech Svc	120	160	40	33%	3%	11,090	3.0%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support	330	210	-120	-36%	4%	17,910	3.9%
Educational Services	110	110	0	0%	2%	6,790	2.0%
Health Care & Social Assistance	1,310	1,350	40	3%	25%	41,610	25.1%
Arts & Entertainment	90	80	-10	-11%	1%	5,730	1.5%
Accommodations & Food Services	390	520	130	33%	10%	26,550	9.7%
Other Services	120	130	10	8%	2%	12,910	2.4%
Total Employment	4,820	5,370	550	11%		244,390	2.2%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93654. 2) Totals are estimates based on reported establishment counts by firm size
Analysis: Wahlstrom & Associates

Table 24- Employment Trends in the City of Sanger, 2010 - 2014

Industry Sector	Sanger Jobs 2010	Sanger Jobs 2014	Sanger Job Growth 2010-2014	Sanger Percent Change 2010-2014	Percent Total 2014	Fresno County Jobs 2014	Sanger share of County Jobs 2014
Agriculture (not crop production)	350	200	-150	-43%	4%	2,750	7.3%
Oil, Gas & Mining	40	40	0	0%	1%	230	17.4%
Utilities	0	20	20	100%	0%	2,920	0.7%
Construction	240	480	240	100%	11%	13,470	3.6%
Manufacturing	770	870	100	13%	19%	23,170	3.8%
Wholesale Trade	140	190	50	36%	4%	15,280	1.2%
Retail Trade	700	880	180	26%	19%	35,920	2.4%
Transportation & Warehouse	40	80	40	100%	2%	8,590	0.9%
Information Services	30	40	10	33%	1%	4,020	1.0%
Financial & Insurance	60	90	30	50%	2%	8,710	1.0%
Real Estate	40	90	50	125%	2%	4,480	2.0%
Professional, Scientific & Tech Svc	100	110	10	10%	2%	11,090	1.0%
Management of Companies	10	40	30	300%	1%	2,260	1.8%
Administrative Support	80	70	-10	-13%	2%	17,910	0.4%
Educational Services	0	10	10	100%	0%	6,790	0.1%
Health Care & Social Assistance	340	560	220	65%	12%	41,610	1.3%
Arts & Entertainment	20	50	30	150%	1%	5,730	0.9%
Accommodations & Food Services	430	580	150	35%	13%	26,550	2.2%
Other Services	150	170	20	13%	4%	12,910	1.3%
Total Employment	3,540	4,570	1,030	29%		244,390	1.9%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93657. 2) Totals are estimates based on reported establishment counts by firm size
Analysis: Wahlstrom & Associates

Table 25- Employment Trends in the City of Orange Cove, 2010 - 2014

Industry Sector	Orange Cove Jobs 2010	Orange Cove Jobs 2014	Job Growth 2010-2014	Percent Change 2010-2014	Percent Total 2014	Fresno County jobs 2014	Orange Cove share of County Jobs 2014
Agriculture (not crop production)	220	230	10	5%	37%	2,750	8.4%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	0	0	0	0%	0%	2,920	0.0%
Construction	0	10	10	100%	2%	13,470	0.1%
Manufacturing	30	20	-10	-33%	3%	23,170	0.1%
Wholesale Trade	10	40	30	300%	6%	15,280	0.3%
Retail Trade	100	120	20	20%	19%	35,920	0.3%
Transportation & Warehouse	110	40	-70	-64%	6%	8,590	0.5%
Information Services	0	0	0	0%	0%	4,020	0.0%
Financial & Insurance	10	10	0	0%	2%	8,710	0.1%
Real Estate	10	20	10	100%	3%	4,480	0.4%
Professional, Scientific & Tech Svc	180	0	-180	-100%	0%	11,090	0.0%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support	0	10	10	100%	2%	17,910	0.1%
Educational Services	10	10	0	0%	2%	6,790	0.1%
Health Care & Social Assistance	90	80	-10	-11%	13%	41,610	0.2%
Arts & Entertainment	0	0	0	0%	0%	5,730	0.0%
Accommodations & Food Services	0	10	10	100%	2%	26,550	0.0%
Other Services	20	30	10	50%	5%	12,910	0.2%
Total Employment	790	630	-160	-20%		244,390	0.3%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93646. 2) Totals are estimates based on reported establishment counts by firm size
 Analysis: Wahlstrom & Associates

Table 26- Employment Trends in the City of Parlier, 2010 - 2014

Industry Sector	Parlier Jobs 2010	Parlier Jobs 2014	Job Growth 2010-2014	Percent Change 2010-2014	Percent Total 2014	Fresno County jobs 2014	Parlier share of County Jobs 2014
Agriculture (not crop production)	340	380	40	12%	22%	2,750	13.8%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	0	0	0	0%	0%	2,920	0.0%
Construction	0	10	10	100%	1%	13,470	0.1%
Manufacturing	270	420	150	56%	24%	23,170	1.8%
Wholesale Trade	150	190	40	27%	11%	15,280	1.2%
Retail Trade	180	230	50	28%	13%	35,920	0.6%
Transportation & Warehouse	10	20	10	100%	1%	8,590	0.2%
Information Services	0	0	0	0%	0%	4,020	0.0%
Financial & Insurance	10	10	0	0%	1%	8,710	0.1%
Real Estate	0	10	10	100%	1%	4,480	0.2%
Professional, Scientific & Tech Svc	10	10	0	0%	1%	11,090	0.1%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support	0	0	0	0%	0%	17,910	0.0%
Educational Services	10	10	0	0%	1%	6,790	0.1%
Health Care & Social Assistance	200	290	90	45%	17%	41,610	0.7%
Arts & Entertainment	0	0	0	0%	0%	5,730	0.0%
Accommodations & Food Services	60	110	50	83%	6%	26,550	0.4%
Other Services	20	40	20	100%	2%	12,910	0.3%
Total Employment	1,260	1,730	470	37%		244,390	0.7%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93648. 2) Totals are estimates based on reported establishment counts by firm size
Analysis: Wahlstrom & Associates

Table 27- Employment Trends in the City of San Joaquin, 2010 - 2014

Industry Sector	San Joaquin Jobs 2010	San Joaquin Jobs 2014	Job Growth 2010-2014	Percent Change 2010-2014	Percent Total 2014	Fresno County jobs 2014	San Joaquin share of County Jobs 2014
Agriculture (not crop production)	10	0	-10	-100%	0%	2,750	0.0%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	0	0	0	0%	85%	2,920	0.0%
Construction	0	0	0	0%	0%	13,470	0.0%
Manufacturing	0	0	0	0%	0%	23,170	0.0%
Wholesale Trade	20	10	-10	-50%	1%	15,280	0.1%
Retail Trade	50	60	10	20%	5%	35,920	0.2%
Transportation & Warehouse	40	10	-30	-75%	1%	8,590	0.1%
Information Services	0	0	0	0%	0%	4,020	0.0%
Financial & Insurance	20	10	-10	-50%	1%	8,710	0.1%
Real Estate	0	0	0	0%	0%	4,480	0.0%
Professional, Scientific & Tech Svc	0	0	0	0%	0%	11,090	0.0%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support	40	40	0	0%	3%	17,910	0.2%
Educational Services	0	0	0	0%	0%	6,790	0.0%
Health Care & Social Assistance	60	40	-20	-33%	3%	41,610	0.1%
Arts & Entertainment	0	0	0	0%	0%	5,730	0.0%
Accommodations & Food Services	20	20	0	0%	2%	26,550	0.1%
Other Services	0	0	0	0%	0%	12,910	0.0%
Total Employment	260	190	-70	11%	-15%	244,390	0.1%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93660. 2) Totals are estimates based on reported establishment counts by firm size
 Analysis: Wahlstrom & Associates

Table 28- Employment Trends in the City of Kerman, 2010 - 2014

Industry Sector	Kerman Jobs 2010	Kerman Jobs 2014	Job Growth 2010-2014	Percent Change 2010-2014	Percent Total 2014	Fresno County jobs 2014	Kerman share of County Jobs 2014
Agriculture (not crop production)	80	290	210	263%	12%	2,750	10.5%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	0	0	0	0%	0%	2,920	0.0%
Construction	30	80	50	167%	3%	13,470	0.6%
Manufacturing	150	310	160	107%	13%	23,170	1.3%
Wholesale Trade	120	270	150	125%	11%	15,280	1.8%
Retail Trade	340	340	0	0%	14%	35,920	0.9%
Transportation & Warehouse	40	30	-10	-25%	1%	8,590	0.3%
Information Services	80	160	80	100%	7%	4,020	4.0%
Financial & Insurance	50	30	-20	-40%	1%	8,710	0.3%
Real Estate	30	50	20	67%	2%	4,480	1.1%
Professional, Scientific & Tech Svc	30	50	20	67%	2%	11,090	0.5%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support	90	200	110	122%	8%	17,910	1.1%
Educational Services	40	20	-20	-50%	1%	6,790	0.3%
Health Care & Social Assistance	160	180	20	13%	8%	41,610	0.4%
Arts & Entertainment	10	0	-10	-100%	0%	5,730	0.0%
Accommodations & Food Services	220	290	70	32%	12%	26,550	1.1%
Other Services	50	60	10	20%	3%	12,910	0.5%
Total Employment	1,520	2,360	840	55%		244,390	1.0%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93630. 2) Totals are estimates based on reported establishment counts by firm size
Analysis: Wahlstrom & Associates

Table 29- Employment Trends in the City of Firebaugh, 2010 - 2014

Industry Sector	Firebaugh Jobs 2010	Firebaugh Jobs 2014	Job Growth 2010-2014	Percent Change 2010-2014	Percent Total 2014	Fresno County jobs 2014	Firebaugh share of County Jobs 2014
Agriculture (not crop production)	30	220	190	633%	16%	2,750	8.0%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	30	40	10	33%	3%	2,920	1.4%
Construction	10	10	0	0%	1%	13,470	0.1%
Manufacturing	320	380	60	19%	27%	23,170	1.6%
Wholesale Trade	150	200	50	33%	14%	15,280	1.3%
Retail Trade	110	150	40	36%	11%	35,920	0.4%
Transportation & Warehouse	30	90	60	200%	6%	8,590	1.0%
Information Services	0	0	0	0%	0%	4,020	0.0%
Financial & Insurance	10	20	10	100%	1%	8,710	0.2%
Real Estate	0	20	20	0%	1%	4,480	0.4%
Professional, Scientific & Tech Svc	0	10	10	0%	1%	11,090	0.1%
Management of Companies	10	0	-10	-100%	0%	2,260	0.0%
Administrative Support	0	10	10	0%	1%	17,910	0.1%
Educational Services	20	10	-10	-50%	1%	6,790	0.1%
Health Care & Social Assistance	70	10	-60	-86%	1%	41,610	0.0%
Arts & Entertainment	0	0	0	0%	0%	5,730	0.0%
Accommodations & Food Services	110	210	100	91%	15%	26,550	0.8%
Other Services	20	20	0	0%	1%	12,910	0.2%
Total Employment	920	1,400	480	52%		244,390	0.6%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93622. 2) Totals are estimates based on reported establishment counts by firm size
 Analysis: Wahlstrom & Associates

Table 30- Employment Trends in the City of Mendota, 2010 - 2014

Industry Sector	Mendota Jobs 2010	Mendota Jobs 2014	Job Growth 2010-2014	Percent Change 2010-2014	Percent Total 2014	Fresno County jobs 2014	Mendota share of County Jobs 2014
Agriculture (not crop production)	30	40	10	33%	6%	2,750	1.5%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	30	40	10	33%	6%	2,920	1.4%
Construction	0	10	10	100%	1%	13,470	0.1%
Manufacturing	10	20	10	100%	3%	23,170	0.1%
Wholesale Trade	50	60	10	20%	9%	15,280	0.4%
Retail Trade	160	220	60	38%	32%	35,920	0.6%
Transportation & Warehouse	30	60	30	100%	9%	8,590	0.7%
Information Services	0	0	0	0%	0%	4,020	0.0%
Financial & Insurance	0	0	0	0%	0%	8,710	0.0%
Real Estate	10	10	0	0%	1%	4,480	0.2%
Professional, Scientific & Tech Svc	0	10	10	100%	1%	11,090	0.1%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support	0	0	0	0%	0%	17,910	0.0%
Educational Services	0	0	0	0%	0%	6,790	0.0%
Health Care & Social Assistance	90	60	-30	-33%	9%	41,610	0.1%
Arts & Entertainment	0	0	0	0%	0%	5,730	0.0%
Accommodations & Food Services	90	130	40	44%	19%	26,550	0.5%
Other Services	10	20	10	100%	3%	12,910	0.2%
Total Employment	510	680	170	33%		244,390	0.3%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93640. 2) Totals are estimates based on reported establishment counts by firm size
 Analysis: Wahlstrom & Associates

Table 31- Employment Trends in the City of Coalinga, 2010 - 2014

Industry Sector	Coalinga Jobs 2010	Coalinga Jobs 2014	Job Growth 2010-2014	Percent Change 2010-2014	Percent Total 2014	Fresno County jobs 2014	Coalinga share of County Jobs 2014
Agriculture (not crop production)	200	240	40	20%	9%	2,750	8.7%
Oil, Gas & Mining	10	80	70	700%	3%	230	34.8%
Utilities	20	10	-10	-50%	0%	2,920	0.3%
Construction	60	50	-10	-17%	2%	13,470	0.4%
Manufacturing	20	50	30	150%	2%	23,170	0.2%
Wholesale Trade	30	50	20	67%	2%	15,280	0.3%
Retail Trade	330	410	80	24%	16%	35,920	1.1%
Transportation & Warehouse	250	260	10	4%	10%	8,590	3.0%
Information Services	10	20	10	100%	1%	4,020	0.5%
Financial & Insurance	20	30	10	50%	1%	8,710	0.3%
Real Estate	30	40	10	33%	2%	4,480	0.9%
Professional, Scientific & Tech Svc	70	80	10	14%	3%	11,090	0.7%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support	40	50	10	25%	2%	17,910	0.3%
Educational Services	0	0	0	0%	0%	6,790	0.0%
Health Care & Social Assistance	240	240	0	0%	9%	41,610	0.6%
Arts & Entertainment	0	10	10	0%	0%	5,730	0.2%
Accommodations & Food Services	750	910	160	21%	35%	26,550	3.4%
Other Services	70	70	0	0%	3%	12,910	0.5%
Total Employment	2,150	2,600	450	21%		244,390	1.1%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93210. 2) Totals are estimates based on reported establishment counts by firm size
Analysis: Wahlstrom & Associates

Table 32- Employment Trends in the City of Huron, 2010 - 2014

Industry Sector	Huron Jobs 2010	Huron Jobs 2014	Job Growth 2010-2014	Percent Change 2010-2014	Percent Total 2014	Fresno County jobs 2014	Huron share of County Jobs 2014
Agriculture (not crop production)	20	10	-10	-50%	3%	2,750	0.4%
Oil, Gas & Mining	0	0	0	0%	0%	230	0.0%
Utilities	0	10	10	100%	3%	2,920	0.3%
Construction	10	10	0	0%	3%	13,470	0.1%
Manufacturing	30	40	10	33%	12%	23,170	0.2%
Wholesale Trade	10	10	0	0%	3%	15,280	0.1%
Retail Trade	90	130	40	44%	38%	35,920	0.4%
Transportation & Warehouse	10	10	0	0%	3%	8,590	0.1%
Information Services	0	0	0	0%	0%	4,020	0.0%
Financial & Insurance	0	10	10	100%	3%	8,710	0.1%
Real Estate	10	10	0	0%	3%	4,480	0.2%
Professional, Scientific & Tech Svc	10	10	0	0%	3%	11,090	0.1%
Management of Companies	0	0	0	0%	0%	2,260	0.0%
Administrative Support	0	0	0	0%	0%	17,910	0.0%
Educational Services	10	0	-10	-100%	0%	6,790	0.0%
Health Care & Social Assistance	40	50	10	25%	15%	41,610	0.1%
Arts & Entertainment	0	0	0	0%	0%	5,730	0.0%
Accommodations & Food Services	50	30	-20	-40%	9%	26,550	0.1%
Other Services	10	10	0	0%	3%	12,910	0.1%
Total Employment	300	340	40	13%		244,390	0.1%

Data Sources: U.S. County Business Pattern, May 2016. Notes: 1) Data counts of establishments and jobs within Zip codes 93234. 2) Totals are estimates based on reported establishment counts by firm size
Analysis: Wahlstrom & Associates

Appendix B-

Economic Development Initiatives

B-1 FRESNO COUNTY ECONOMIC DEVELOPMENT INITIATIVES

Region: Fresno County			
Project	Description	Economic Impact	Approx. Cost
1) Attract the High Speed Rail Heavy Maintenance Facility	Secure site and develop infrastructure for the location of California's High Speed Rail Heavy Maintenance Facility within Fresno County.	Potential to employ more than 1,000 workers and serve as a magnet for other industries serving the State's High Speed Rail Program.	\$25-\$30 million
Status: Fresno County is part of a bipartisan coalition of officials including the City of Fresno and the Council of Fresno County Governments, working together with the education, labor and business communities to ensure the success of the California High-Speed Rail Heavy Maintenance Facility in Fresno County. Fresno County is also partnering with the Fresno County Transportation Authority, Malaga County Water District, Fresno County Fire Protection District, Fresno Irrigation District and others on site planning (150-200 acres) and infrastructure financing for the Heavy Rail Maintenance Facility.			
2) South 41 Industrial Corridor Revitalization	Feasibility/Site/Infrastructure development for the location of high value agricultural processing and other industry along the South 41 Highway Corridor.	Potential to employ 500+ workers, diversify the local economy consistent with the Economic Development Element of the General Plan, and build economic resilience for Fresno County.	\$20 million
Status: Initial study completed resulting in identification of this location as a key area for future industrial development.			
3) Develop a Biomass Industry Energy Production Facility in the Sierra Foothills	Pre-development for financing and construction of new economically sustainable combined heat/power biomass utilization plant(s) to recycle/process forest timber from High Sierra canopy depleted by the drought and insurgence of the bark beetle, reducing the cost of forest restoration, providing community jobs, and creating local energy and woodcraft products.	Potential to employ 250 workers, diversify the economy, and provide recycling/green woodcraft products and local energy industry utilizing local resources.	\$10 million

Status: The County has partnered with the Yosemite/Sequoia Resource conservation and Development Area to explore regional opportunities to build on localized efforts.

4) Implement a Groundwater Sustainability Management Plan	Complete groundwater sustainability planning and implement projects including groundwater recharge and banking to relieve the overdraft of the Kings, Westside and Delta-Mendota groundwater basins. Collaboration with the cities in Fresno County, irrigation districts, water resource conservation districts, and other water/community services districts.	Potential to employ 100 workers on various construction projects, and provide for economic stability and resilience of the region for agriculture and other local industry.	\$5-\$7 million
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Status: Various Groundwater Sustainability Agencies are being formed pursuant to California's Sustainable Groundwater Management Act, and are beginning to perform analysis regarding the state of the aquifer across the central San Joaquin Valley region.

5) Develop Infrastructure Improvements along the Golden State Corridor	Develop infrastructure improvements along the 13-mile corridor including pavement rehabilitation, drainage facilities, traffic signals, bicycle lanes, pedestrian/bicycle paths, landscaping and other hardscape improvements; and include specific offsite improvements for newly locating industries, targeting food processing and other related industry.	Potential for creation of 100-250 construction jobs, with potential for additional jobs through the eventual location of new businesses.	\$46 million
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Status: Specific Plan and Design Engineering plans completed, next step to secure funding for construction development. Project is collaboration with cities of Fowler, Kingsburg and Selma, and the Fresno Council of Governments

6) Develop West Side Agricultural Tourism Trail	Planning/implementation of public/private partnership West Side agricultural tourism trail as companion to successful Fresno County Fruit Trail, Blossom Trail, and Fall Foliage Trail in eastern Fresno County.	Expected to rival east side trail tourism impact of over 30,000 visitors annually per trail, with corresponding economic impact to hospitality industry Countywide.	\$50,000
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Status: Preliminary planning completed, business stakeholders identified. Project headed by Fresno County Office of Tourism (agri-tourism trails administrator), to collaborate with west side cities such as Kerman, Mendota, Firebaugh, Huron, San Joaquin and Coalinga, and local chambers of commerce in communities such as Laton, Riverdale and Caruthers.

7) Improve Water Supply and other Infrastructure at key interchanges along the Interstate 5 Corridor	Develop water and related infrastructure services that can help attract new commercial and services uses that cater to highway travelers at key interchanges along Interstate 5. Potential to also include warehouse/distribution centers.	Potential to employ up to 250-300 workers, and provide economic impact from traveler spending. Potential warehouse/distribution centers would provide additional employment opportunities and diversify the local economy.	\$3 million
Status: Initial planning efforts identified in the General Plan Economic Development Element, and feasibility study prepared by the I-5 Business Development Corridor, Inc., partnership.			
8) Support the Expansion of the Water, Energy and Technology (WET) Center Business Incubator Facility	Expand the current WET Incubator to include 12 additional offices for water, energy and agricultural technology start-ups.	The current facility houses 6 companies and the additional space will accommodate up to 80 companies over a 10 year time span, which will attract new investment and create new jobs	\$3 million
Status: Seeking funding for the WET accelerator and the expansion of incubator space.			
9) Attract a High Speed Rail University to Fresno County	Establish a High Speed Rail University that will be a consortium of regional education partners including California State University Fresno, State Center Community College District, regional community colleges, and other public- and private workforce development programs	The HSR University has the potential to educate and train people from all of the United States about the construction, operation and maintenance of the High Speed Rail and related technologies. An educated and trained workforce in high speed rail related technologies will be attractive to industry that may choose to establish or grow their businesses in the greater Fresno region.	\$20 million
Status: CSU, Fresno is in the process of hiring a new tenure track faculty member with expertise in high-speed rail engineering. Working with other regional partners, the University has also developed a framework for a HSR focused curriculum. Community College partners are working on courses relating to advance manufacturing, and other related technologies.			
10) Develop a New Mandela Training Center in South Fresno County	Establish a satellite campus of the Cypress Mandela Training Center – Fresno in South Fresno County that serves at risk and disconnected young adults between the ages of 18-28. The facility will prepare young adults for career opportunities with	Potential to educate and train 80 students at a time in a 16-week construction trades program. This venture will provide our local residents with long-term career opportunities to move them from poverty to sustainable income levels, with wages	\$10 million

	High Speed Rail Project, CALTRANS and other construction jobs.	no less than \$18.00 per hour.	
Status: Initial planning efforts identified and plans to move forward with designing and opening the Fresno location of Cypress Mandela Training Center.			
11) Support Continued Expansion of the Downtown Business Hub (DBH) Incubator	Since 2011, the Downtown Business Hub (DBH) incubator has provided the community and businesses with a one-stop-shop service center. The Fresno Area Hispanic Foundation's DBH supports the start-up and growth of businesses through technical assistance, outreach, advocacy and access to capital.	Since its grand opening in 2011, the DBH has incubated over 80 small businesses providing them with professional services and workspaces, internet access, phones, a receptionist, and bilingual colleagues — including fellow entrepreneurs and experts in tax, law, finance, and business planning.	\$TBD
Status: Currently, the DBH is home to 20 businesses and will continue to provide support to small businesses through technical assistance and micro-lending.			
12) School of Unlimited Learning (SOUL) expansion. (Fresno EOC)	SOUL is a charter high school located in downtown Fresno (2336 Calaveras Ave.) which serves primarily socioeconomically disadvantaged teens at risk from dropping out of school. SOUL is looking to expand from its current location to build a multi-story facility on an adjacent 24,000 sq.ft. vacant lot that would house a new campus as well as some retail.	The expansion of the school will provide increased alternative educational and career training opportunities at-risk students in the central Fresno area and beyond and, at the same time, provide needed retail resources to the neighborhood.	\$ 6,000,000
Status: Fresno EOC is in discussion with the owner of the property regarding the sale of the adjacent vacant lot. Meetings have been conducted with the City of Fresno to determine feasibility of multi-story facility. The City has been amenable to the development of the project.			
13) Nielsen Food and Transit Center Expansion (Fresno EOC)	In 1985 Fresno EOC constructed 3110 W. Nielsen Ave. for the Nielsen Food and Transit Center Land Acquisition Purchased 5 acres west of existing property in 2004. Transit New Administration Building	Had created an annual budget of nearly 5 million and employed 50 jobs since 1985 Future growth Base for 120 drivers, and 25 office staff, and	\$1.3 million for construction of a Central Kitchen \$130,000 cost \$1.2 million cost

	<p>In 2009 constructed 6,000 sq. ft. bldg.</p> <p>New Maintenance Facility Constructed in 2006- four bay maintenance facility</p> <p>Parking Lot Expansion Constructed and improved 1 acre of a 5 acre parcel for vehicle parking</p> <p>General Plan Develop a general plan for remaining 4 acres of 5 acre parcel , enlarge the Nielsen Conference Center , Food Production Center and expand Vehicle Maintenance Facility</p> <p>Program Expansion Door to door senior transportation, conversion of meal delivery vehicles to hybrid, convert passenger vehicles to hybrid, add solar generation to facilities, and add electrical charging stations</p>	<p>conference center.</p> <p>Employed 4 mechanics and 1 Supervisor. Maintains agency fleet and other Social Service fleet vehicles</p> <p>Employee Support to carry out expanded work.</p> <p>Future Growth including increased employment and revenue generation</p> <p>Adds jobs and reduces the carbon footprint.</p>	<p>\$450,000 cost</p> <p>\$160,000 cost</p> <p>Estimated \$5 million for all including street improvements</p> <p>\$800,000 impact</p>
<p>Status: The land acquisition is under development. The transit building, new maintenance facility and parking lot expansion are currently operating. The general plan and program expansion are for future growth.</p>			

B-2 CLOVIS ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Clovis			
Project	Description	Economic Impact	Approx. Cost
1) Redevelop the Swiss Colony Winery and the adjacent 19.5 acre vacant land site (3495 Clovis Avenue)	The City purchased the 16.6 acre old Swiss Colony Winery site to create a dynamic mixed use development that will provide a southern entry to the City and benefit Clovis with jobs, tax base and retail and entertainment opportunities.	The winery has long been closed down and the property used for a variety of interim uses. It has fallen into disrepair and the project has significant development hurdles to overcome before development takes place. This property, in conjunction with the adjacent 19.5 acres, provides an opportunity to eliminate blight, improve the tax base and create job opportunities through a public/private joint venture with	\$1,500,000 to clear the site and make it ready for new development.

		the owners of the adjacent properties. The intent of this project is to develop a mixed use development including commercial, office, and housing to create a southern entry into the City of Clovis.	
Status: The City has completed the environmental work and has budgeted to clear the site in the 2016-17 fiscal year. Private investment will need to be attracted to plan and build out new land uses.			
2) Develop the Golden Triangle Property (Southwest corner of Herndon and Clovis Avenues)	The City originally created a master plan for the area bounded by Herndon Avenue, Clovis Avenue and Highway 168 to work with the many property owners to create a cohesive, well-planned development. From the master plan came the Golden Triangle development that, while still in development, currently includes office space, restaurants, a technical school, pharmaceutical school, and hotel.	The master plan was created so that an area with several property owners, obsolete lot patterns and the potential for piecemeal development could be designed with reciprocal access and parking. With the master plan design, no property owner has the benefit over another. The City's involvement has included development of the master plan, purchase of remnant property from Caltrans and assistance with off-site improvements. The expected outcome of this project, when complete, is the high quality development of strategically located property to bring jobs and increased tax base to the City.	Privately funded with no public costs
Status: The City is working to market the vacant properties to developers and potential users.			
3) Develop the Centennial Plaza Pads at 355 Pollasky Avenue	In 2008 the Department of Motor Vehicles relocated their Clovis office, vacating the City owned property. The City created a plaza and two building pads. These pads have been sold to two private sector developers to create a mixed use in-fill development on the property.	This property is located in the heart of Old Town Clovis. Many cities have excellent ambiance during business hours in their respective down town areas. After 5pm, however, the setting changes. The feeling of emptiness in the streets takes over. A well-developed mixed use project that incorporates retail or commercial and residential will benefit the City and the Old Town area as well. By incorporating residential in Old Town, a more active atmosphere is expected after 5pm.	Reuse will be privately funded with no public costs
Status: A proposed mixed use development project is under construction and should be completed in the summer of Spring of 2017.			

4) Develop the Mixed Use Areas 17 & 18	<p>A Master Plan has been prepared to guide the mixed use development of Area 17 & 18 bounded by Armstrong Avenue on the west/Temperance on the east/Herndon Avenue on the south/Highway 168 on the north. The City is currently working with the property owners to create market the area.</p>	<p>The areas have 44 properties and many owners and have the potential to develop in an uncoordinated piecemeal manner. The City's worked with the property owners to create the master plan for a high quality mixed-use area that includes office, commercial and residential with reciprocal access and parking to support the needs of the hospital, located to the east. Mixed Use Areas 17 & 18 will provide jobs and an increased tax base for the City.</p>	<p>Public costs are currently unknown. Project implementation will require the attraction of new private investment.</p>
<p>Status: Property owners are working together with a commercial broker to market the area to new business establishments and prospective developers.</p>			
5) Complete the development and full build-out of the Research and Technology Business Park	<p>In 1998, Clovis created the idea of a Research and Technology Business Park (R & T Park) and spent nearly five years planning and developing the park to provide development for technology and headquarter businesses. The City invested over \$4 million, thanks in large part to an EDA grant, state infrastructure loan, and City general fund money.</p>	<p>In Central California, there are many different business parks, but not technology oriented. The R&T Park offers a unique atmosphere embracing technology oriented businesses on one campus. Starting in 2004, several businesses have moved to the R & T Park. The City's expectation is that the R&T Park becomes the headquarters for advanced technology oriented businesses and is recognized among the best technology parks in California. This will ultimately increase the availability of high quality, well-paying jobs in Clovis.</p>	<p>No additional public costs are anticipated. New private investment costs are unknown</p>
<p>Status: The City has been working with the brokers representing property in the area to market the RT Park for development.</p>			
6) Research and Technology Business Park Expansion (East of R&T Park) and Additional Expansion southeast of HWY 168 at Owens Mountain Parkway	<p>The proposed Research and Technology Business Park Expansion is located in northeast Clovis, east of the existing Research and Technology Business Park. The total area is approximately 153 acres of which 93 are privately owned and 60 publicly owned.</p>	<p>The Research and Technology Business Park Expansion addresses the short supply of land available for light industrial, business park and research and technology types of development as well as addresses the availability of high quality, well-paying jobs in Clovis. It will also create a location for future business attraction and expansion opportunities that will provide jobs and an increased tax base.</p>	<p>Public and private costs are unknown at this time</p>

Status: The General Plan amendment for the RT Park expansion is complete. The City is currently planning for the infrastructure to access this area. For the area southeast of FWY 168 at Owens Mountain Parkway conversations are underway to expand the City's sphere to include this area and begin infrastructure planning.			
7) Revitalization of Shaw Avenue	The City of Clovis completed a two-year study of Shaw Avenue to determine its condition, blight, and revitalization needs. The study found a need to work on the following items: 1) visual components (signs, banners, landscaping, logo, etc.); 2) revisiting of site plan vision; 3) establish Shaw Avenue as a destination; 4) possibility of creating a business association; 5) study traffic movement along the corridor and 6) determine opportunity sites for mixed use and intensification of use. Through a grant, the City created the Shaw Avenue Pattern Book to guide future improvements and development along the corridor.	Shaw Avenue has the most concentration of retail business in Clovis. City officials had noticed an increase in vacancy rates along the corridor between Highway 168 and Armstrong Avenue. To address this issue, a study and an action plan was put in place. This project will make Shaw Avenue a shopping destination and retain a healthy vacancy rate of 5 % or less.	Public and private costs are unknown at this time
Status: Staff is working with area property owners to create a Property Based Improvement District in order to implement the Shaw Avenue Pattern Book.			
8) Develop the remaining vacant sites at the City of Clovis Industrial Park	The Clovis Industrial Park is home to Pelco by Schneider, Krazan & Associates, FedEx, and a retail shopping center anchored by Costco and WinCo. There are approximately 26 acres of vacant property available for development	The City expects to completely fill the Clovis Industrial Park with quality companies that provide employment while providing opportunities for expansion to local companies that need to grow.	No additional public costs are anticipated. New private investment is unknown at this time
Status: The City has sold vacant property in the Industrial Park and is working to attract new users.			
9) Implement Tourism Strategy	The City of Clovis has successfully attracted large and prestigious events such as the Amgen Tour of California Professional Bicycle Race and the California Interscholastic Federation State High School Track and Field Championship. Historically, Clovis has embraced the opportunity to attract large	Increasing tourist expenditures in Clovis will generate more sales and TOT tax revenues, plus additional direct and indirect visitor spending. Hotels, motels, restaurants, retail stores, tourist attractions, gasoline stations and transportation companies are among the businesses where the tourist actually hands the money to the business operator. Implementing the tourism	No additional public costs are anticipated

	numbers of visitors to Clovis for these events as well as Big Hat Days, Friday Night Farmers Market, National Pole Vault Championships, Antique and Collectible Fairs, and the Clovis Rodeo as well as other events, attractions and activities.	strategy will allow Clovis to capture disposable money from customers who have an option to spend it elsewhere. Additional visitor spending in Clovis helps pay real estate, business, and income taxes since these are paid by the businesses from the customer-generated revenues.	
<p>Status: The Clovis Hotel Association meets regularly to work on increasing hotel business within Clovis. Citizens involved with the Tourism Advisory Committee continue to work to raise awareness of staying in Clovis among tourists, event attendees and business travelers. Economic Development staff is intricately involved in attracting special events and working with event sponsors to increase the benefit to the City of Clovis.</p> <p>Regularly held events like Big Hat Days, Friday Night Farmers Market, National Pole Vault Championships, Antique and Collectible Fairs, and the Clovis Rodeo continue to draw out of town tourists to Clovis as well as people from around the area for day visits.</p>			

B-3 FOWLER ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Fowler			
Project	Description	Economic Impact	Approx. Cost
1) Three Crowns Industrial Park Build Out	City is working with the Three Crowns property owner and prospective businesses to develop 10 parcels on 14-acres of industrial property located on Valley Drive and Golden State Boulevard	Preparation of shovel ready industrial sites can attract new business that will add to the job base.	\$1,500,000 to clear the site and make it ready for new development.
<p>Status: Temperance/Valley Drive loop has been completed and 70% of the property has been developed. The Three Crowns project is a continuation of the industrial park.</p>			
2) Attract new commercial and residential real estate investment	Recent additions include a Denny's Restaurant and Dollar General Store. The City has approved the Magill Terrace Apartments and is reviewing the development of new single family housing.	New commercial and residential real estate development will create construction and permanent full time jobs. Potential new growth in the Adams/Clovis Avenue area could provide mixed use development opportunities.	The need for public funding is unknown at this time
<p>Status: Implementation will rely on attracting new private investment. Attraction efforts are in process</p>			

3) Attract an Adventist Health/ Valley Children's Hospital clinic to Fowler	Facilitate development of a 50,000 square foot clinic and medical offices at 10th and Fresno Streets	Important medical facility that provides services to residents of Fowler and the surrounding area. Will create new jobs and attract a skilled workforce	Facility will be privately financed. City assistance is unknown at this time
Status: Site and infrastructure planning underway. Construction start is in 2016.			
4) Provide infrastructure to 17 acres of commercial property.	Major mixed-use commercial property will serve the community as an extension of Fowler's downtown.	Property has potential for hotel, restaurant, commercial, and affordable housing providing jobs, property and sales tax benefits, and housing opportunity.	City is working with the landowner and private developers to determine additional public costs, which are unknown at this time
Status: Efforts to attract private investment and fund infrastructure improvements are in process. City is working with the landowner and private developers and will facilitate development with infrastructure such as drainage and street improvements.			
5) Industrial lands annexation	Fowler's Sphere of Influence north of the City includes more than 800 acres designated for industry. The City already provides sewer service to the area and annexation would significantly increase the City's industrial land inventory.	Potential for job creation would benefit the City of Fowler and the entire region	No public costs. Land subdivision and service extension will be privately financed as development occurs.
Status: Preliminary planning and discussions with Fresno County underway.			

B-4 SELMA ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Selma			
Project	Description	Economic Impact	Approx. Cost
1) Selma Crossing Commercial Center Project	This is a phased project to build out 287 acres of mixed use over the next 15-20 years. Full build out would add 2 million square feet of new retail space, 500,000 square feet of office, 400,000 square foot auto mall, two hotels, a waterpark and 250 housing	Will bring many new jobs that will employ people from throughout the area. Project will significantly expand Selma's position as a regional shopping hub and a sales tax generator	Privately funded with the required public costs TBD

	units .		
Status: Environmental Review, Pending Annexation			
2) Selma Grove Shopping Center	This is a phased commercial project that proposes to build 1 million square feet of new commercial space plus a hotel and gas station in two phases	Will bring many new jobs that will employ people from throughout the area. Project will continue to expand Selma's position as a regional shopping hub and sales tax generator.	Privately funded with the required public costs TBD
Status: Environmental document approved, In Process of LAFCO approval			
3) Attract Commercial Establishments to Available Infill Opportunity Sites	Eight commercial infill sites were identified in the 2016 Kosmont Report.	Will create additional retail commercial and service activity and create jobs.	TBD
Status: Preliminary			
4) Golden State Corridor Economic Development Infrastructure Improvements	Streetscape, urban design and infrastructure improvements along 13 miles of the Highway 99 corridor between the Cities of Selma, Fowler and Kingsburg. Proposed improvements include pavement rehabilitation, drainage facilities, traffic signals, bicycle lanes and pedestrian/bicycle paths, landscaping, and other hardscape improvements.	The goal of this project is to revitalize the Corridor, enhance economic development, and improve Corridor safety for both commercial purposes as well as local drivers.	\$46 million to design and implement the improvements
Status: Design phase is complete and funds are being raised for implementation			
5) Dinuba Avenue Sewer Improvements	Will bring sewer from Golden State to Dinuba Avenue for Northern Growth	Will create new jobs, housing and businesses to the north.	\$3 million
Status: Preliminary Design			
6) Amberwood Development	A Master Plan was prepared to develop 2,560 housing units and 130,000 square feet of new commercial space on 100 acres of land on existing farmland.	The proposed will double Selma's size at full build out, adding to the consumer spending capacity and improving the feasibility of two other proposed shopping centers	For sale asking price of the site is \$62 million. Cost of additional planning and infrastructure improvements are

			unknown
Status: The land is for sale and the proposed project still needs to be annexed			

B-5 KINGSBURG ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Kingsburg			
Project	Description	Economic Impact	Approx. Cost
1) Kingsburg Business Park Build Out	The City is in the process of rezoning property to provide flexibility and direction for proper parcel use. A centralized marketing program is also the next investment provided by the City.	New business attracted to Kingsburg will create jobs and add new tax revenue	Development of parcels will be privately financed. No public funding is anticipated
Status: The City has taken over marketing of the park, including website and promotion. New tenants are expected to break ground in 2016.			
2) Downtown Façade Improvement Financing	The City has established a public/private partnership fund façade improvements on downtown buildings and alleyways.	Façade improvements will improve the marketability of downtown buildings, which will create jobs and add to the City's fiscal base.	Up to \$5,000 matching funds for each project.
Status: The program is underway with several applications in process.			
3) Light Industrial Business Expansion and Attraction	The City has experienced a renaissance of light industrial expansion, with over 50,000 of newly added square footage and another 200,000 sq. ft. proposed along the Golden State corridor.	Growth along Golden State Blvd. 100+ new jobs created.	Build out of parcels will be privately financed. Public funding is TBD
Status: Investment in the light industrial corridor is ongoing.			
4) Develop and promote Agri-tourism District	Promote tourism based district that provides multi-use development based upon Central Valley agricultural.	Utilizes Kingsburg's location as a tourist destination that offers fresh, local start-ups including beer/wine tastings. New business and job opportunity.	Public/Private partnership to develop and build out infrastructure
Status: City is creating a specific district that will incentivize specific uses in the urban core to promote the agricultural benefits of our region while providing a destination for tourists and residents alike.			

5) Rehabilitating mixed-uses in the Downtown Core	Reinvestment into the City's core through the rehabilitation of historic buildings to allow for mixed use (residential and commercial) repurposing of space.	Provides living space in downtown, creating immediate foot traffic that encourages ancillary development and quality of life amenities.	P3 program that provides developer incentives for eligible upper floor rehab projects.
Status: City is developing a public/private partnership to help fund necessary design, land banking and pre-development activities aimed at providing mixed-use spaces in underutilized historic downtown buildings.			
6) Secure Land and Develop Regional Sports Complex	Provide necessary amenities to serve regional population for baseball, softball and soccer.	Location provides access for both regional and state draw. Provides additional business for local hotels, restaurants and ancillary development.	Land acquisition and infrastructure costs to be determined.
Status: City is working to secure necessary land as part of public/private partnerships. Site control will assist in driving funding for recreational facility development.			

B-6 REEDLEY ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Reedley			
Project	Description	Economic Impact	Approx. Cost
1) Prepare Reedley Downtown Plan	The City in concert with the Reedley downtown businesses will prepare a plan for the downtown corridor. The plan will identify streetscape, traffic calming, signage and landscape improvements that can help revitalize the Downtown Corridor.	The downtown plan is being created as a means to engage the property owners and local businesses to make Downtown Reedley more attractive to expanded retail, dining and entertainment opportunities.	\$500,000
Status: A number of vested business owners have begun to initiate meetings, while the City is in the process of developing an in-house committee to support the private sector's efforts.			

2) Develop the Central Valley Transportation Center	This will be a joint-use facility that will house the fleets, maintenance centers, certain offices, and educational facilities for the City and the Kings Canyon School District. The Joint Center will be home to fueling stations for vehicles that use alternative energy fuels including electric, gas-hybrid, Compressed Natural Gas, Liquefied Natural Gas, E-85, Hydrogen, and solar fleets. Reedley College will also train mechanics in new green technologies and fuels at the new facility	Reduce pollution and create 50 new green technology jobs	The City was awarded \$1.5 million to fund the fueling stations. Reedley College was awarded \$1.5 million for training. No other local funding will be required.
Status: The first phases of the project are currently under construction.			

B-7 SANGER ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Sanger			
Project	Description	Economic Impact	Approx. Cost
1) Industrial Waste Line Extension	Install and extend an industrial-size waste water treatment line from its current location in North Avenue to more than 150 acres of industrially-zoned land to the south. The line will serve new industries as far as Central Avenue to the south, Academy Avenue to the West and Newmark Avenue to the east.	The economic impact of this waste line can be tens of millions of dollars as it will enable the location of 25 or more new industries in the area.	Approximate cost will be \$2,000,000.
Status: We have verified the number of jobs to be created in the area in anticipation of applying for an EDA grant.			
2) Install New Municipal Water Tank	Install a 750,000-gallon water storage tank on the City's north side to improve service to existing users and enable annexation and development of new territories in the City's northern sphere of influence.	The economic impact of this project will be in the tens of millions of dollars as it will enable the construction of two new hotels and the development of more than 100 acres of commercially-zoned lands along Academy Avenue between California Avenue and Highway 180.	The cost of this water tank project is \$2,200,000.
Status: The new municipal water plant site has been identified and the preliminary plans have been approved. EDA funding has been requested and a decision on this funding will be announced in 2016.			

B-8 ORANGE COVE ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Orange Cove			
Project	Description	Economic Impact	Approx. Cost
1) Attract Solar Farms	City is exploring the potential to attract a solar farm. Renewable energy and technology companies require building, equipment and working capital financing.	Projections are for up to 100 jobs.	Project will be privately financed. Costs to the City are uncertain at this time
Status: City is analyzing the benefits of a solar farm, but have not done enough research on overall payouts. We as a City are still interested in a solar project.			
2) Infrastructure Improvements for New Orange Cove Shopping Center	City is applying for EDA funding to provide infrastructure for the commercial development on the NWC of Anchor and Park Blvd. Infrastructure improvements will be, but not limited to, the extension of a sewer line, curb and gutter, traffic lights, sidewalks and median island.	New sales tax revenue estimated between \$50,000 to \$75,000 for sales tax and \$50,000 to \$75,000 for property tax. Projections are for 120 new jobs.	\$1.7 million for off-site improvements and \$2.0 million in on-site development.
Status: City is in the process of a site plan review for the development.			
3) Off-site public improvements to Attract an Industrial Manufacturer	City is trying to attract an industrial manufacturer to the 13.5 acre industrial site on the NEC of Jacobs and South Ave. Project will require off-site improvements	\$377,000 for sale of land	Off-site public improvements to Attract an Industrial Manufacturer
Status: Client is doing a feasibility study.			

B-9 PARLER ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Parlier			
Project	Description	Economic Impact	Approx. Cost
1) Upgrade the Wastewater Treatment Plant	Expand and upgrade City Wastewater Treatment Plant	A new wastewater treatment plant will support residential, commercial and industrial growth. This will bring jobs and expanded wealth to the	\$30-\$40 Million

		residents of Parlier	
Status: The expansion of the City's wastewater treatment plant is a goal the City continues to pursue. Our staff grant writer continues to search for grant dollars for the project. The City, however, did purchase (60) acres across the street from the existing WWTP for future expansion purposes.			
2) Establish a new Business Incubator and Training Center	The City of Parlier intends to pursue funding from Economic Development Administration to establish a Business Incubator and Training Center with a primary focus on medical, agricultural, and Green Technology. The PBIT Center will work with Higher Education and alternate education science programs to educate and provide new skills for students, the unemployed, retired military, and US Veterans.	A business incubator will facilitate the start up on new business in Parlier. This in turn will create jobs and expand incomes for community residents. The training center will provide the Parlier students the opportunity to continue their education and attain the skills needed for higher paying jobs in the medical or technology field.	\$5 Million
Status: Plans in development.			
3) Build Out Phase 2 of the Parlier Industrial Park	The City of Parlier boasts a 297-acre business/industrial park located on Manning Avenue which is a major artery linking eastern Fresno County to state Highway 99. Phase 1 has been developed, and the city will pursue funding to develop Phase 2, which will require public water and sewer infrastructure improvements and other off-site improvements.	The infrastructure improvements will accommodate the startup of new businesses and bring more jobs to the city and region.	Project will attract private investment. Costs of public improvements are unknown at this time
Status: The first phase of this park has been developed with off-site infrastructure and is home to three large manufacturing companies creating over 100 jobs. The park is marketed for light and heavy industrial use with electronic assembly, food processing and warehouse distribution.			

B-10 SAN JOAQUIN ECONOMIC DEVELOPMENT INITIATIVES

Region: City of San Joaquin			
Project	Description	Economic Impact	Approx. Cost
1) Improve Access to Cherry Lane Industrial Park	Construct a new street to provide access to 130 acres of industrial designated land improvements. Expand sewer, water, storm drain improvements to serve an	70 construction jobs created or retained. 400 permanent jobs created if the area is fully developed	\$1,400,000

	existing onion processing plant. Flooding will be avoided by extending the storm drain line. Install an on-site sewer debris trap for a hatchery business that is experiencing clogging of its sewer lateral by debris.		
Status: No funding in place for project at present time. Waiting for a grant opportunity			
2) Improve South Railroad Avenue	Reconstruct 1,000 feet of Railroad Avenue from Manning Avenue to Main Street that serves the City Corporation yard and three light-industrial properties, which will support additional truck traffic. Install new storm drains and drainage.	25 construction jobs created or retained. 15 permanent jobs created or retained.	\$750,000
Status: No funding in place for project at present time.			

B-11 FIREBAUGH ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Firebaugh			
Project	Description	Economic Impact	Approx. Cost
1) Industrial Infrastructure Improvements	Provide water, sewer and storm drainage infrastructure to 40 acres of industrially zoned land near Tomatek at the intersection of Highway 33 and Bullard in Firebaugh.	Infrastructure improvements are needed to attract more business to Firebaugh's industrial areas, which will support job growth and improve the City's fiscal base.	\$1,000,000 but public costs of all improvements could be much larger
Status: The City is currently working on building a new well to replace a well that was put off service last year. This well will be needed to supply future water to this proposed industrial area. After the well is on line the City can begin securing funding for the water lines, sewer lines and storm drain facilities.			

B-12 MENDOTA ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Mendota			
Project	Description	Economic Impact	Approx. Cost
1) Prepare a written Economic Development Plan/Strategy	The City has not had a written Economic Development Plan for a number of years. Economic	A more focused plan will allow for a more efficient approach and will strengthen any applications for funds related	Minimal – to be done in-house.

	Development has been mostly reactive with some proactive work being done in recent years.	to ED projects.	
Status: Currently being written.			
2) Establish a Pilot's School at the Mendota Airport	Cooperative between the airports in Mendota and Reedley, a flight school would provide flying lessons in light, electric planes.	Tax revenue, increased use of the airport, and an advanced-level training for a well-paying job will bring positive attention and attract more visitors.	Estimates vary depending on grant funds received and equipment purchased
Status: Awaiting the approval of funds.			

B-13 COALINGA ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Coalinga			
Project	Description	Economic Impact	Approx. Cost
1) Attract Cannabis growing business establishments	The City is actively courting cannabis growing business establishments to locate in the Juniper Ridge Industrial Park	The City has already generated \$4.1 million of revenue for the sale of the closed former Claremont Custody Center. More marijuana production facilities will create additional jobs and improve the City's fiscal base	Production facilities will be privately financed. No public costs should be incurred
Status: City signed an agreement to sell the former Claremont Custody Center to a developer that will establish a cannabis production facility. Other medical marijuana growers are interested in building facilities in Coalinga's industrial areas.			
2) Build out the Juniper Ridge Industrial Park	The Successor Agency currently owns 12 "shovel ready industrial lots" at the Juniper Ridge industrial park. This industrial park includes improved streets, curbs, gutters and access to other infrastructure services.	Development of the finished industrial lots will aid the City in job creation, sales tax revenue generation and property tax increase.	No additional public improvements are anticipated
Status: Due to the abolishment of RDA the properties are currently for sale and will be developed at market rate.			

B-14 HURON ECONOMIC DEVELOPMENT INITIATIVES

Region: City of Huron

Project	Description	Economic Impact	Approx. Cost
1) Continue to improve the infrastructure supporting the 60-acre industrial and commercial area	Specific infrastructure improvements needed will depend on the tenants to be attracted. Cannabis producers may require additional water supply.	Attracting tenants to the industrial area will create new jobs and revenue to the City from the sale of land	Unknown
Status: The marketing effort is in progress			



Appendix C – City of Fresno Certified Economic Development Strategy

Attached as a separate document.

