



COUNTY OF FRESNO CEDS

*COMMUNITY WORKSHOP*

*FEBRUARY 13, 2025*

JEFF MARCELL, SR. PARTNER  
ELIZABETH SCOTT, SR. CONSULTANT  
VICTORIA WILSON, CONSULTANT

# AGENDA

- ▶ Introduction
- ▶ Project Overview
- ▶ Planning Process
  - ▶ Discovery Findings
  - ▶ SWOT Analysis
- ▶ Strategy Discussion



# INTRODUCTION

# THEORY INTO PRACTICE

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Committed to **holistic thinking** and **sustainable development**.

We design strategies that will support your community's  
**vision for the future.**

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1995

YEAR FOUNDED

550+

ENGAGEMENTS

400+

CLIENTS

44

STATES

5

COUNTRIES



## Project Team



**Jeff Marcell**  
Senior Partner

PRINCIPAL-IN-CHARGE



**Elizabeth Scott**  
Senior Consultant

PROJECT MANAGER



**Victoria Wilson**  
Consultant

PROJECT CONSULTANT

The background is a solid orange color with several overlapping, semi-transparent orange shapes. On the left side, there is a large, light-orange circle that overlaps a darker orange circle. Below these, there are various geometric shapes, including a large triangle and a smaller circle, all in different shades of orange, creating a layered, abstract composition.

# PROJECT OVERVIEW

# PROJECT GOAL

*To create a fully digitally integrated Comprehensive Economic Development Strategy (CEDS) for Fresno County and its 14 incorporated cities to guide economic prosperity, resilience, and federal grant eligibility.*



# CEDS STRATEGY COMMITTEE

**Nick Audino**  
Newmark Pearson Commercial

**Cristian Gonzalez**  
City of Mendota

**Jesus Martinez**  
CVIIC

**Karen Pearson**  
Sanger Chamber of Commerce

**Deep Singh**  
City of Selma

**Sean Brewer**  
City of Coalinga

**Alex Henderson**  
City of Kingsburg

**Chad McCollum**  
City of Clovis

**Jolene Polyack**  
City of Kingsburg

**Lisa Swartz**  
Kingsburg Chamber of Commerce

**Chris Brown**  
Fennemore Dowling Aaron

**Esmeralda Hurtado**  
City of Sanger

**Jonathan Meza**  
Mendota Chamber of Commerce

**Julian Ramos**  
Fresno County EDC

**Erik Valencia**  
Reedley Chamber of Commerce

**Elizabeth Cabrera**  
City of San Joaquin

**John Jansons**  
City of Kerman

**Vong Mouanoutoua**  
Community Health System

**Jim Quan**  
Full Circle Renewables

**Buk Wagner**  
Colliers International

**Gino Cayanan**  
Noble Credit Union

**Simran Jhutti**  
Fresno Council of Governments

**Scott Netherton**  
Coalinga Chamber of Commerce

**Yvette Quiroga**  
County of Fresno

**Pao Yang**  
The Fresno Center

**Ed Dunkel**  
Precision Civil Engineering, Inc.

**Bernard Jimenez**  
County of Fresno

**Lauren Nikkel**  
Fresno County EDC

**Bernadette Rojas**  
U.S. Department of Commerce,  
International Trade Administration

**Nicole Zieba**  
City of Reedley

**Bryn Forhan**  
The Forhan Company

**Mike Kissinger**  
Kerman Chamber of Commerce

**Will Oliver**  
Fresno County EDC

**Donald Rollin**  
Hidden Hills Nut Co.

**Karen Foster**  
Selma Chamber of Commerce

**Ray Leon**  
City of Huron

**Lisa Olivera**  
Fresno Clovis Visitors Bureau

**Fernando Santallian**  
City of Selma

**Thomas Gaffery**  
City of Fowler

**Cassandra Little**  
Fresno Metro Black Chamber of  
Commerce

**Nathan Olson**  
City of Sanger

**Charlie Schuh\***  
Colliers International

*\* Denotes alternate member*

# CEDS OVERVIEW

- ▶ A **strategy and data-informed** plan for regional economic development.
- ▶ The result of a **regionally-owned planning process** designed to **build capacity** and guide the economic **prosperity** and **resiliency** of an area or region.
- ▶ Considers, integrates, and **leverages other regional planning efforts**.
- ▶ Required elements include a **SWOT analysis**, compiled from regional demographic and socioeconomic data, target sector analysis, and infrastructure assets.
- ▶ Regions must update their CEDS at least **every 5 years** to qualify for EDA assistance.
- ▶ A CEDS is a prerequisite for **EDD designation** by the EDA.

# CEDS ORGANIZATIONAL ELEMENTS

- ▶ **Summary Background**
  - ▶ Conditions Assessment (Qualitative Analysis)
  - ▶ Economic Context (Quantitative Analysis)
    - ▶ Target Industry Analysis
- ▶ **SWOT Analysis**
  - ▶ Qualitative and Quantitative
- ▶ **Strategic Direction/Action Plan**
  - ▶ Vision, Guiding Principles, Strategies, Actions
- ▶ **Evaluation Framework**
  - ▶ Baseline CEDS Metrics
  - ▶ Strategic Action Metrics

# WHAT INFORMS THE STRATEGIC PLAN?



## WHAT YOU TELL US

- ▶ Meetings with community leadership & staff
- ▶ Focused roundtables
- ▶ Stakeholder interviews, townhalls, & workshops



## WHAT THE DATA TELL US

- ▶ Economic assessment
- ▶ Target industry analysis
- ▶ Workforce analysis



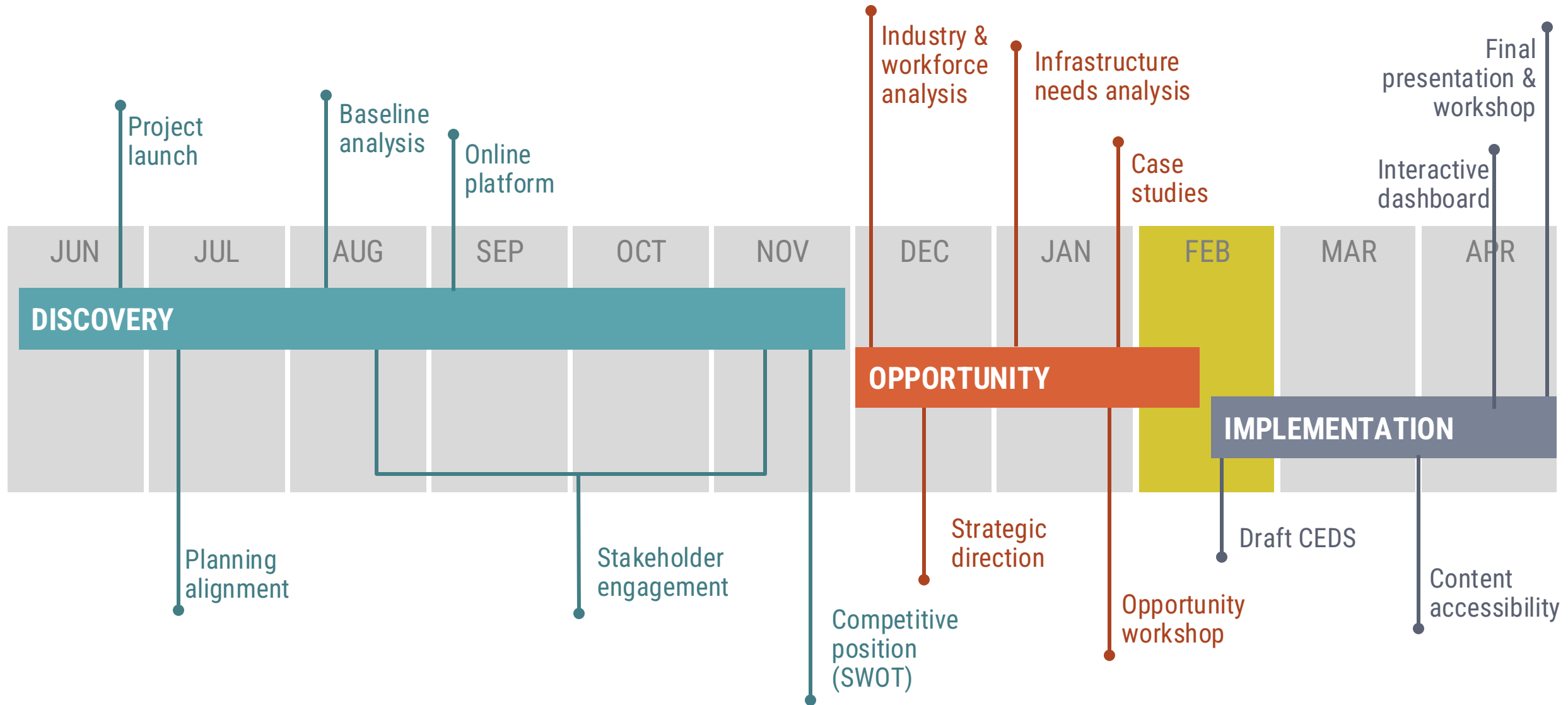
## WHAT OUR EXPERIENCE TELLS US

- ▶ Strategies & initiatives
- ▶ Best practices & use cases
- ▶ Trends in economic development

The background is a solid orange color. On the left side, there is a large, stylized number '8' composed of several overlapping circles and rectangular shapes in various shades of orange. The text 'PLANNING PROCESS' is centered on the right side of the image.

# **PLANNING PROCESS**

# PLANNING PROCESS SCHEDULE (2024-2025)



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# STRATEGIC ANALYSIS

*Quantitative Analysis*

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# FRESNO STRATEGIC ANALYSIS



## BASELINE

### POPULATION

|                       |                    |
|-----------------------|--------------------|
| Population Trend      |                    |
| Population Comparison | Population Drivers |

### SOCIOECONOMIC FACTORS

|                          |                   |
|--------------------------|-------------------|
| Socioeconomic Comparison | Socioeconomic Map |
|--------------------------|-------------------|

### EMPLOYMENT & INDUSTRIES

|                     |                          |
|---------------------|--------------------------|
| Employment Trend    |                          |
| Employment Recovery | Employment Annual Change |
| Industry Employment | Industry Trends          |
| Industry Net Change | Industry Concentration   |



## WORKFORCE & SECTOR TARGETS

### OCCUPATIONAL STRUCTURE

|                                |                         |
|--------------------------------|-------------------------|
| Occupational Employment        |                         |
| Occupational Employment Trends | Occupational Net Change |

### WORKER DYNAMICS

|                      |                        |
|----------------------|------------------------|
| Commuting Overview   | Commuting Demographics |
| Where Residents Work | Where Workers Live     |

### TARGET SECTORS

|                           |                     |
|---------------------------|---------------------|
| Target Sector Definitions |                     |
| Target Demand Patterns    | Skills In Demand    |
| Qualifications            | Occupations         |
| Trends & Credentials      | Target Demographics |
| Target Earnings           | Target Capacity     |



## INFRASTRUCTURE

### OVERVIEW

|  |
|--|
| Developable Land & Existing Infrastructure |
|--|

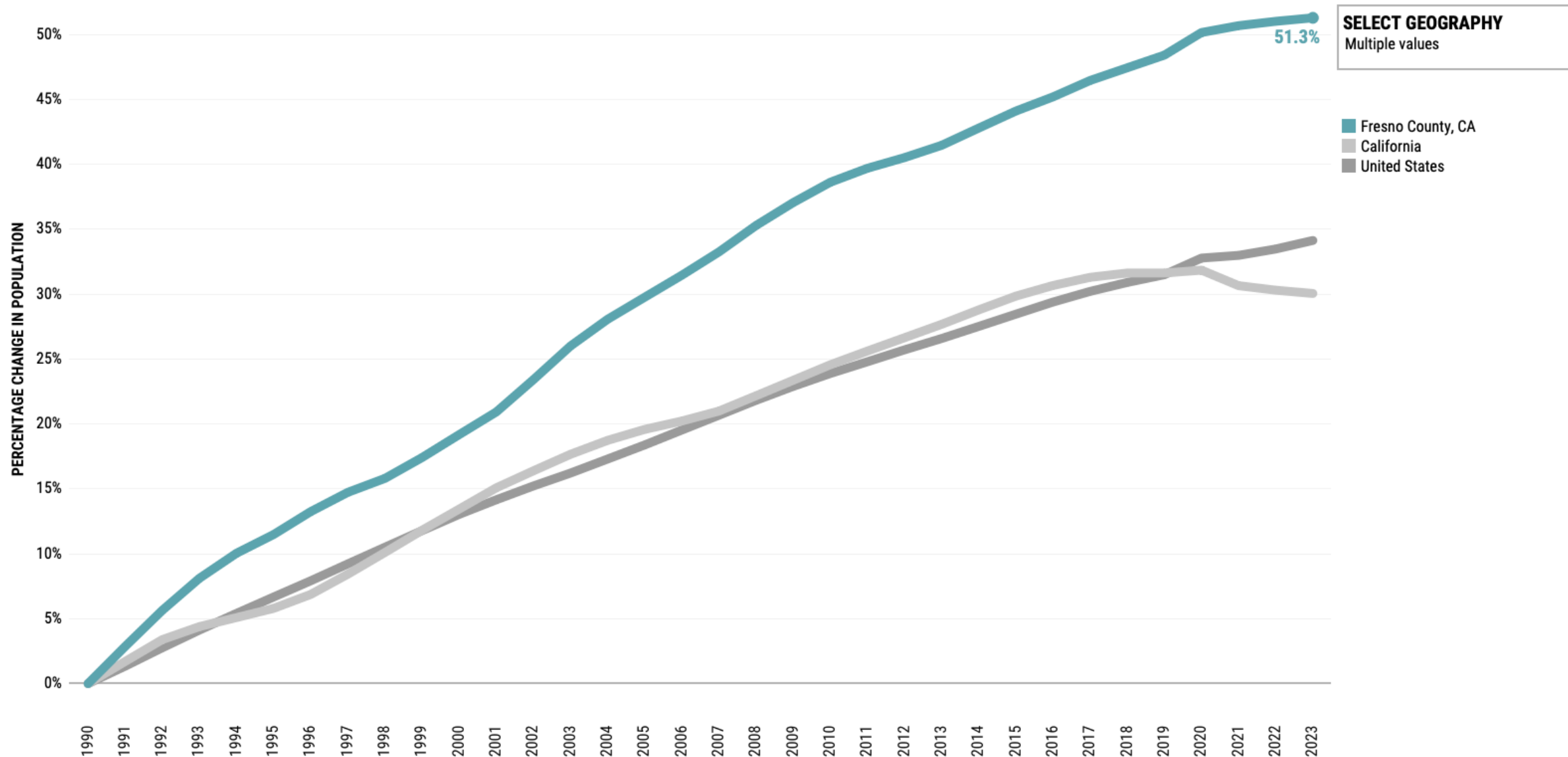
### ANALYSIS & RISKS

|                          |                        |
|--------------------------|------------------------|
| Hazards & Risks          |                        |
| Electricity Grid Queue   |                        |
| Broadband Coverage       | Broadband Availability |
| Air Passenger Traffic    |                        |
| Freight Flow Totals      |                        |
| Freight Flow Comparisons |                        |
| Freight Flow Directions  |                        |



# POPULATION | Comparative Change

MENU

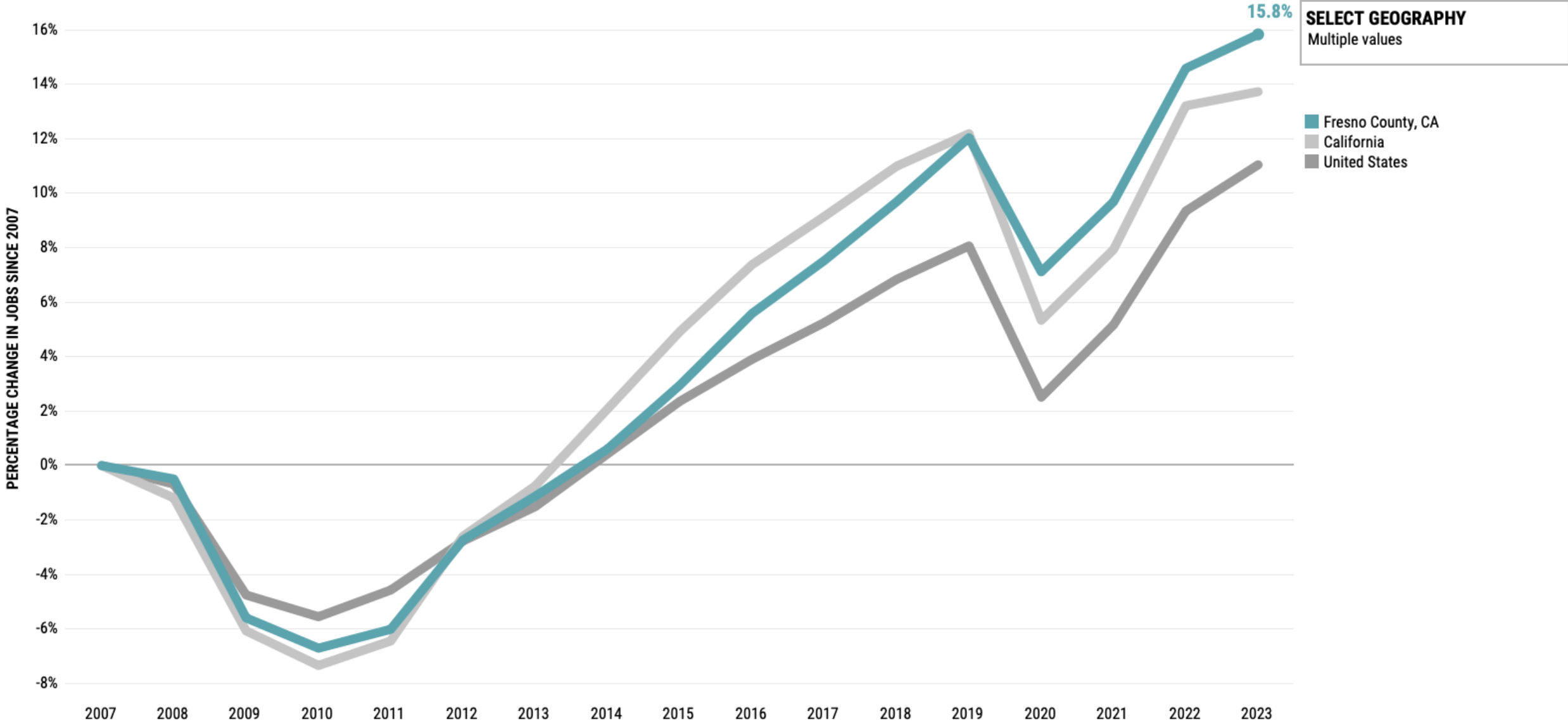


Sources: US Census Bureau, Population Estimates Program; Moody's Analytics; TIP Strategies, Inc.

Notes: Population estimates prior to 2010 are sourced from Moody's Analytics. Estimates from 2010 to 2023 are sourced from the Census Bureau's Population Estimates Program vintages 2020 and 2023.

# TOTAL EMPLOYMENT | Recovery

Fresno County, CA, and comparison areas since the Great Recession

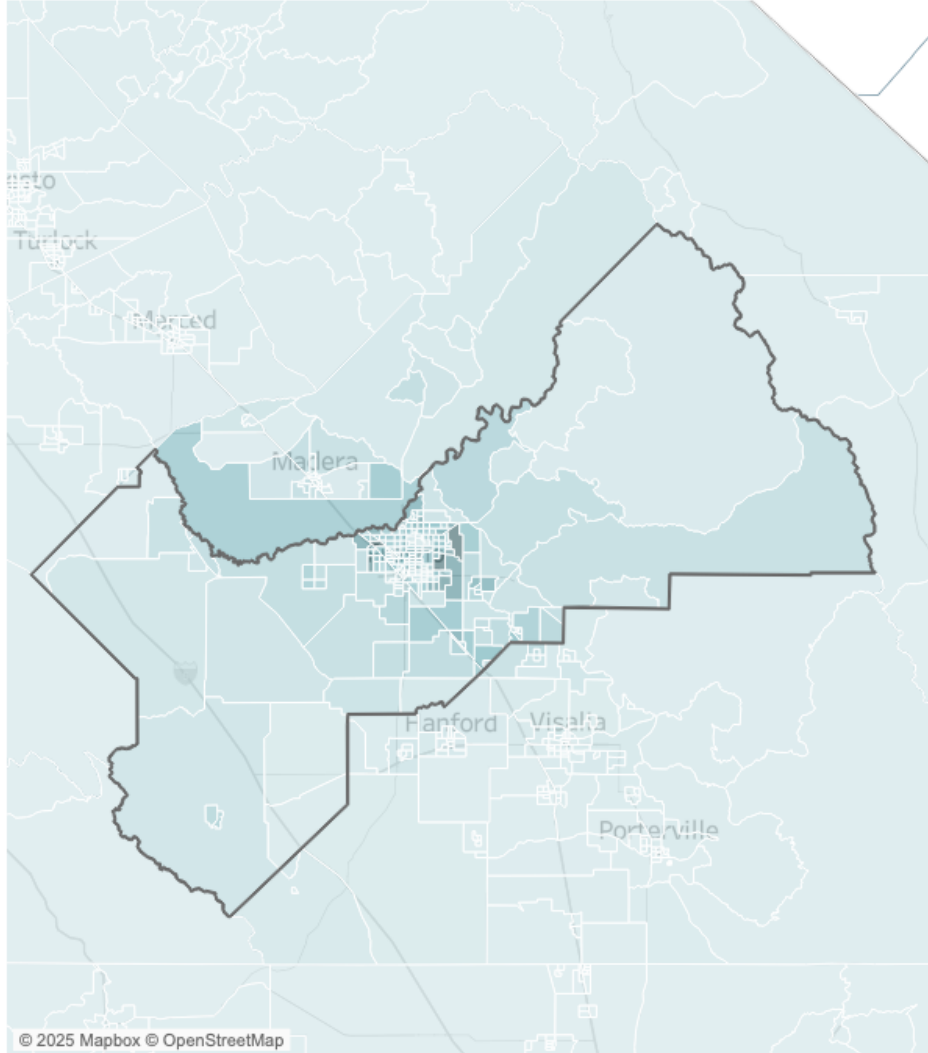


Sources: US Bureau of Labor Statistics (BLS); Lightcast 2024.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.  
Notes: Cities are approximated by aggregated ZIP code-level data.

# COMMUTING PATTERNS | Where Workers Live

Where workers employed in Fresno County, CA lived, 2021

## NUMBER OF RESIDENTS BY CENSUS TRACT



## TOP 10 CITIES WHERE WORKERS LIVED

■ CA

### Live & Work

|                                  |                 |
|----------------------------------|-----------------|
| Fresno city, CA                  | 132,027 (41.1%) |
| Clovis city, CA                  | 34,628 (10.8%)  |
| Unincorporated Fresno County, CA | 23,310 (7.2%)   |
| Sanger city, CA                  | 6,703 (2.1%)    |
| Selma city, CA                   | 5,026 (1.6%)    |
| Reedley city, CA                 | 4,610 (1.4%)    |
| Kerman city, CA                  | 3,399 (1.1%)    |

### Commute In

|                      |              |
|----------------------|--------------|
| Madera city, CA      | 5,384 (1.7%) |
| Visalia city, CA     | 4,547 (1.4%) |
| Los Angeles city, CA | 3,048 (0.9%) |

## SELECT GEOGRAPHY

- County
- City

## SELECT COUNTY

Fresno County, CA

## SELECT YEAR

2021

## SELECT BREAKDOWN TYPE

- Age Groups
- Broad Sector Groups
- Earnings Groups

## SELECT GROUP

All

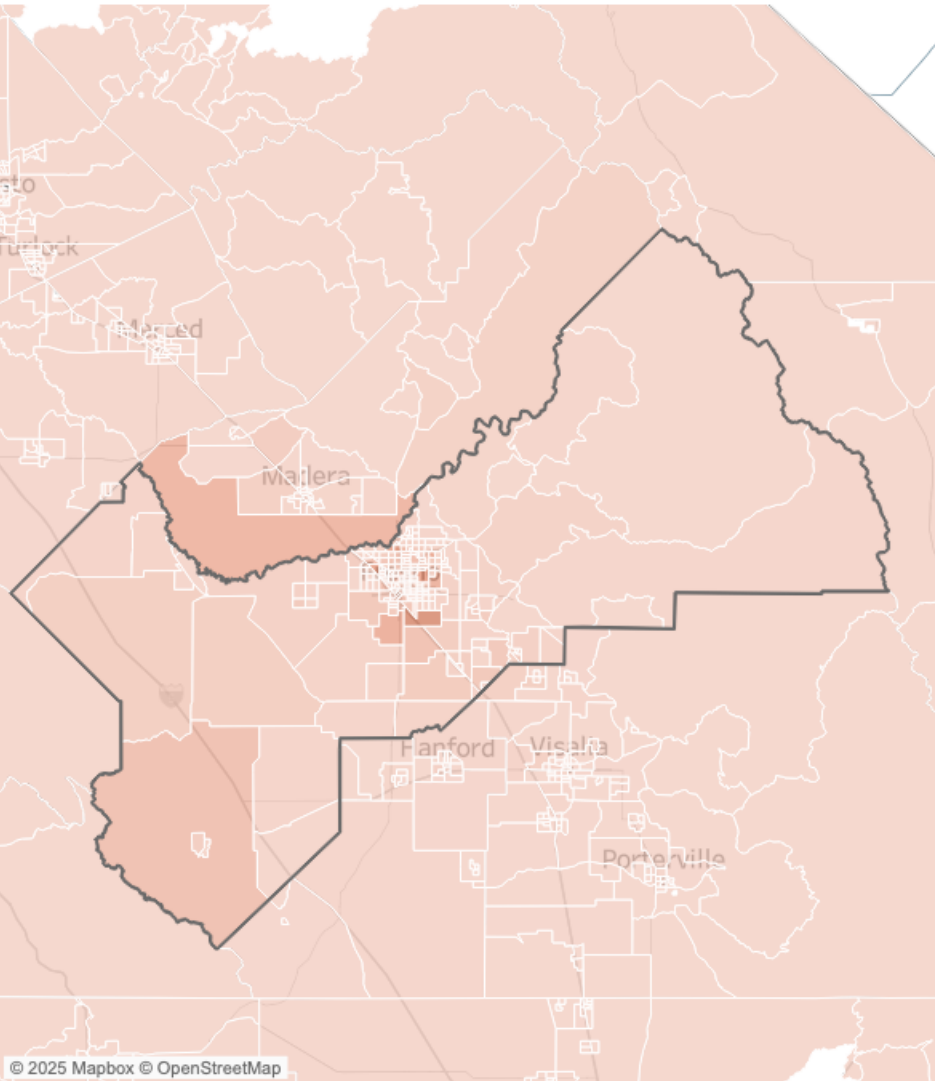
Sources: Longitudinal Employer-Household Dynamics (LEHD), Origin-Destination Employment Statistics (LODES); TIP Strategies, Inc.

Notes: Goods-producing sectors include agriculture, mining, oil and gas extraction, construction, and manufacturing. Trade, transport, and utilities sector includes retail and wholesale trade, transportation, warehousing, and utilities. All other sectors are aggregated. Only includes residents and workers in California.

# COMMUTING PATTERNS | Where Residents Work

Where residents of Fresno County, CA worked, 2021

## NUMBER OF JOBS BY CENSUS TRACT



© 2025 Mapbox © OpenStreetMap

## TOP 10 CITIES WHERE RESIDENTS WORKED

CA

### Live & Work

Fresno city, CA **151,085** (48.0%)

Clovis city, CA **23,561** (7.5%)

Unincorporated Fresno County, CA **21,565** (6.9%)

Sanger city, CA **4,583** (1.5%)

Reedley city, CA **4,310** (1.4%)

Selma city, CA **3,228** (1.0%)

### Commute Out

Visalia city, CA **4,976** (1.6%)

Unincorporated Madera County, CA **4,274** (1.4%)

Madera city, CA **4,024** (1.3%)

Los Angeles city, CA **3,589** (1.1%)

## SELECT GEOGRAPHY TYPE

- County
- City

## SELECT YEAR

2021

## SELECT BREAKDOWN TYPE

- Age Groups
- Broad Sector Groups
- Earnings Groups

## SELECT GROUP

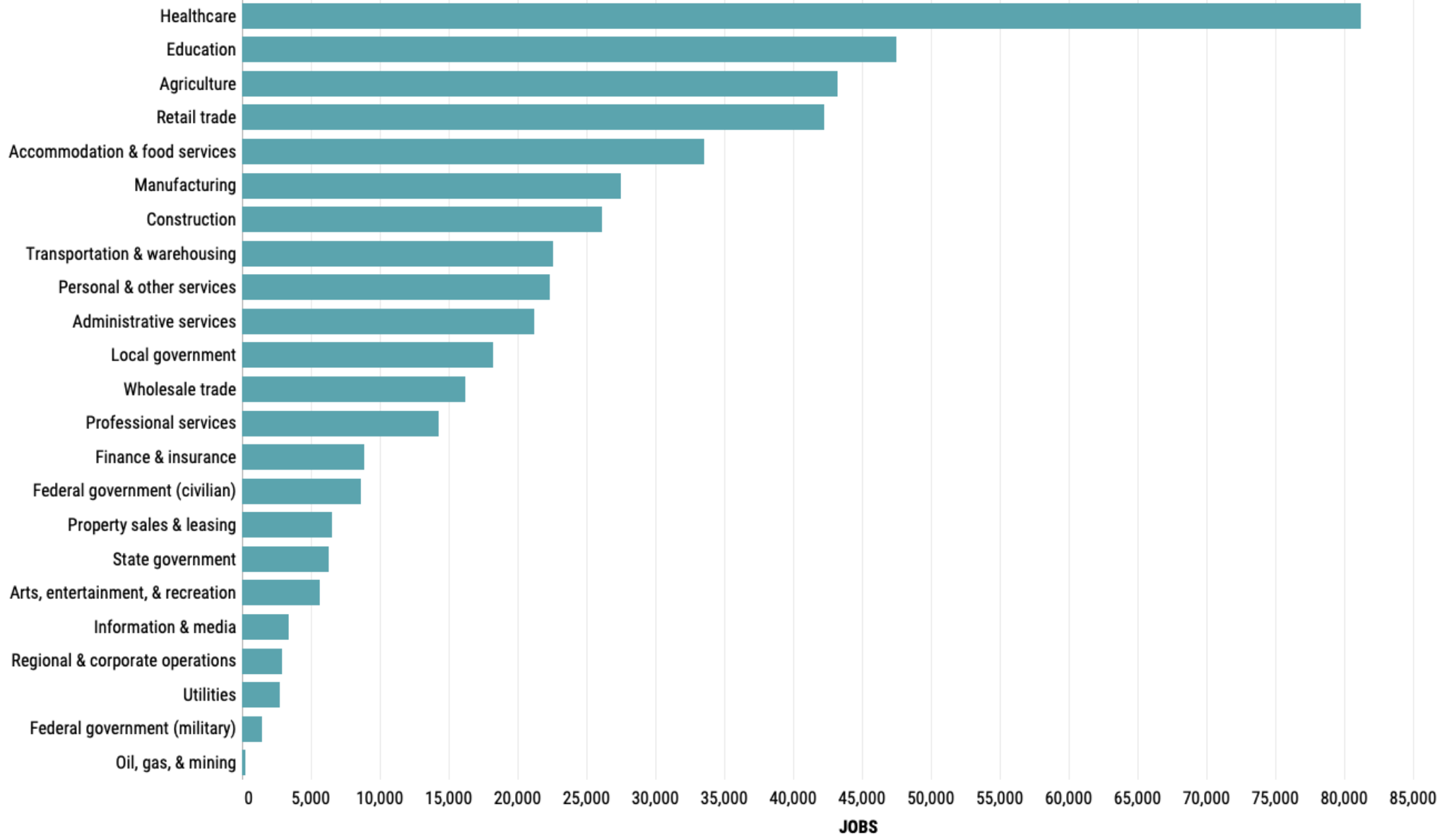
All

Sources: Longitudinal Employer-Household Dynamics (LEHD), Origin-Destination Employment Statistics (LODES); TIP Strategies, Inc.  
 Notes: Goods-producing sectors include agriculture, mining, oil and gas extraction, construction, and manufacturing. Trade, transport, and utilities sector includes retail and wholesale trade, transportation, warehousing, and utilities. All other sectors are aggregated. Only includes residents and workers in California.

# INDUSTRY SECTORS | Job Count

Fresno County, CA, employment by industry sector, 2023

MENU



**SELECT CLASSIFICATION**

- NAICS Sectors
- EDA Clusters

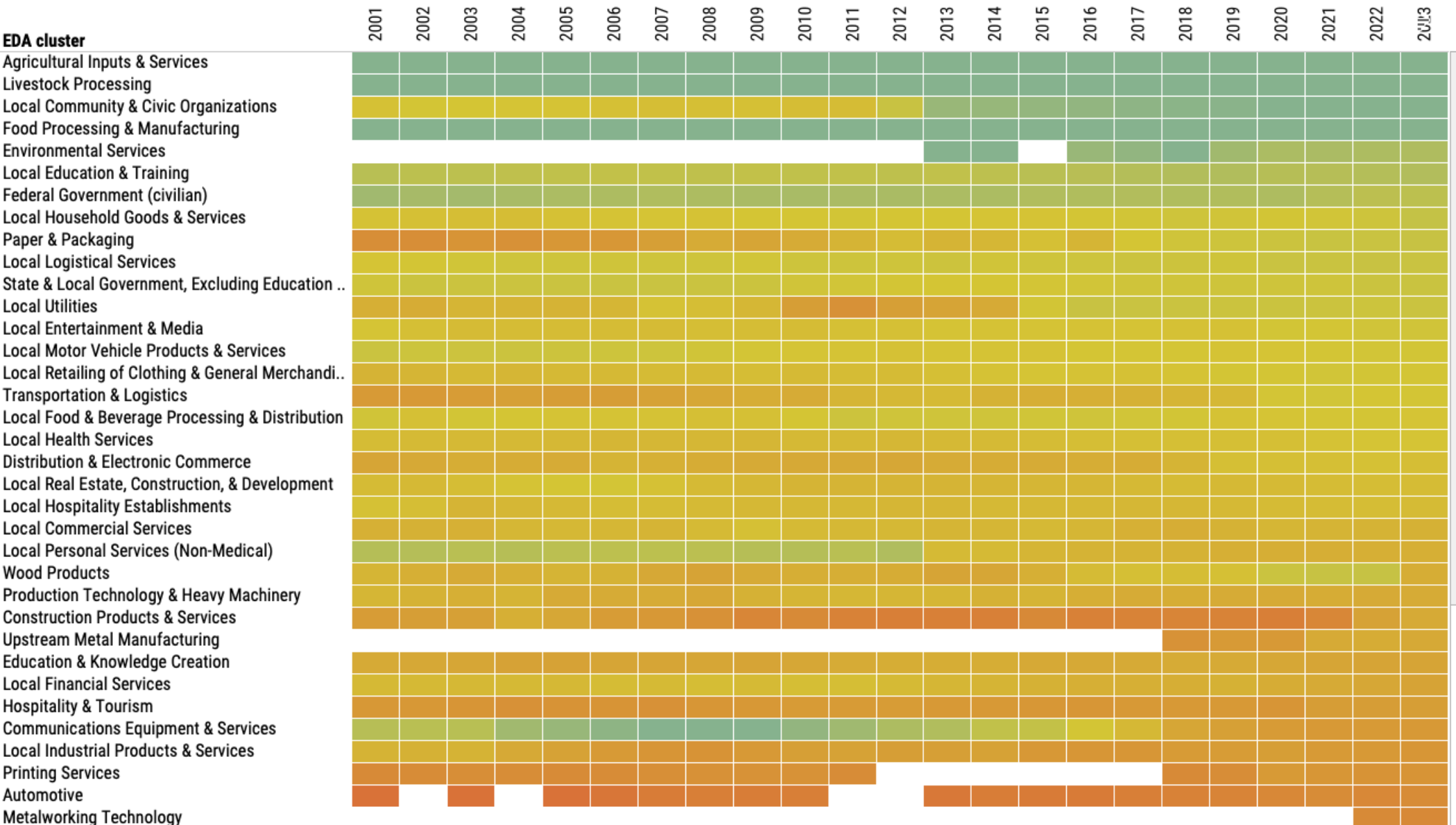
**SELECT YEAR**

2023

Sources: US Bureau of Labor Statistics (BLS); Lightcast 2024.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.  
Notes: Cities are approximated by aggregated ZIP code-level data.

# EDA INDUSTRY CLUSTERS | Concentrations

Location quotients for industry clusters in Fresno County, CA, 2001-2022



**SELECT CLASSIFICATION**

NAICS Sectors

EDA Clusters

---

**SET EMPLOYMENT MINIMUM**

From 500

---

**SELECT TRADED VS LOCAL**

All

**LOCATION QUOTIENT**

0.00 2.00

Location quotients (LQs) measure local employment concentration in a given industry relative to the nation.

- **LQ>1** indicates the region is more concentrated in the industry than the nation.
- **LQ=1** indicates a similar concentration in the region as the nation.
- **LQ<1** indicates the region is less concentrated in the industry than the nation.

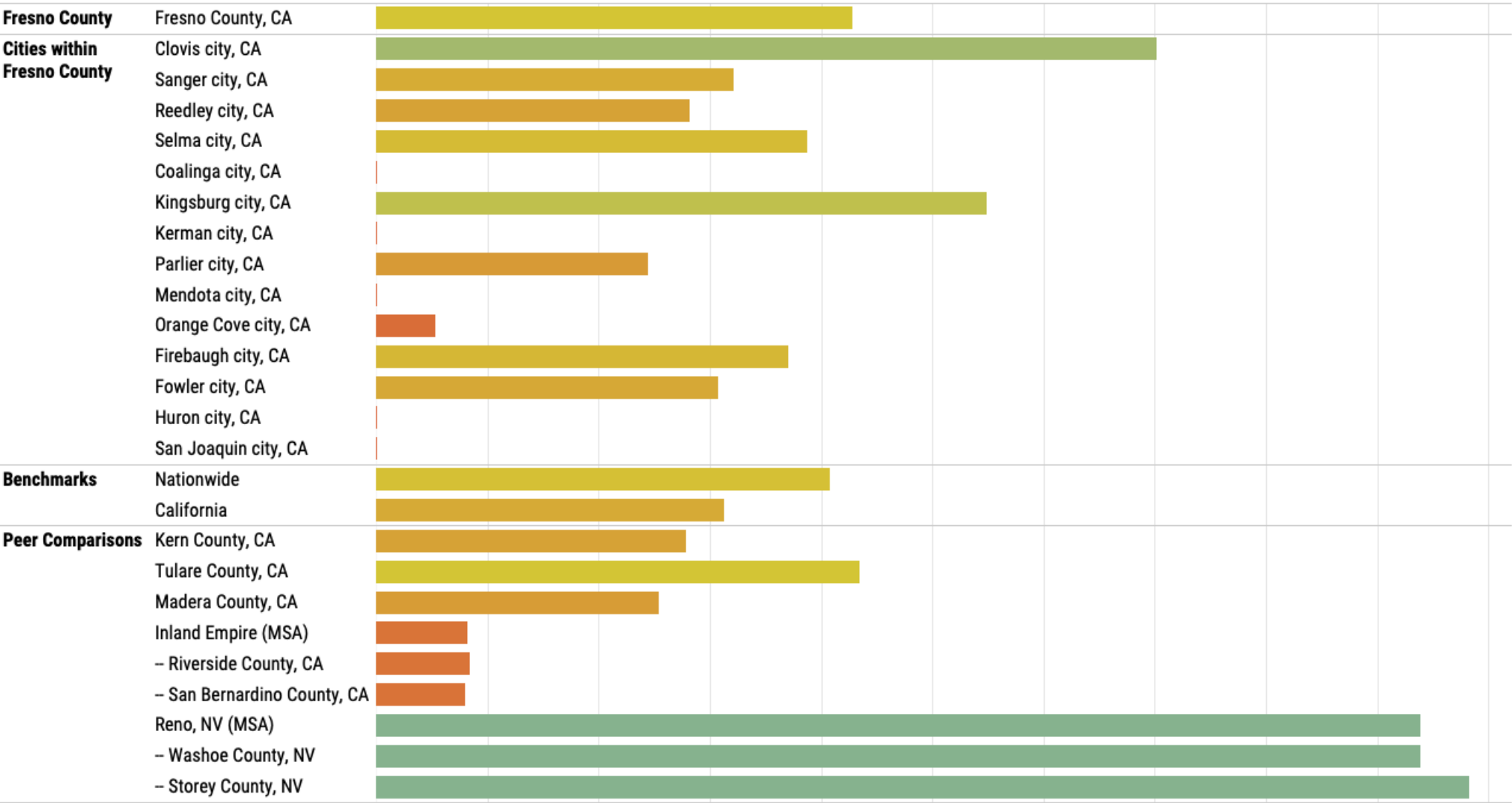
Sources: US Bureau of Labor Statistics (BLS); Lightcast 2024.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration, Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.  
 Notes: Cities are approximated by aggregated ZIP code-level data. Annual Employment filters for industries that have the minimum number of jobs in the specified range for a given region and year. Blank squares indicate the total number of jobs in that industry and year fell below the minimum.

# TARGET INDUSTRIES | Definitions

| Target Type                | Target                        | Scope of Job Postings                    | Category   | Element  |    |
|----------------------------|-------------------------------|--|--|--|----|
| Established & Growing      | Agriculture & Food Processing | Fresno County                            | Agricultural Inputs & Services                     | Agricultural Services                                | 1  |
|                            |                               |  |  | Farm Management & Labor Services                     | 2  |
|                            |                               |  |  | Farms & Ranches                                      | 3  |
|                            |                               |  |  | Fertilizers  | 4  |
|                            |                               |  | Food Processing & Mfg.                             | Baked Goods  | 5  |
|                            |                               |  |  | Farm Wholesalers                                     | 6  |
|                            |                               |  |  | Packaged Fruit & Vegetables                          | 7  |
|                            |                               |  |  | Soft Drinks & Ice                                    | 8  |
|                            |                               |  |  | Specialty Foods & Ingredients                        | 9  |
|                            |                               |  |  | Wineries   | 10 |
|                            |                               |  | Livestock Processing                               | Livestock Merchant Wholesalers                       | 11 |
|                            |                               |  |  | Meat Processing                                      | 12 |
|                            |                               |  |  | Regulation of Agricultural Marketing and Commodities | 13 |
| Healthcare                 | Fresno County                 | Local Health Services                    | Healthcare Provider Offs.                          | 1  |    |
|                            |                               |  | Home & Residential Care                            | 2  |    |
|                            |                               |  | Hospitals  | 3  |    |
|                            |                               |  | Medical Equipment Distribution & Rental            | 4  |    |
|                            |                               |  | Medical Laboratories                               | 5  |    |
| Heavy Manufacturing        | Fresno County                 | Automotive                               | Automotive Parts                                   | 1  |    |
|                            |                               |  | Gasoline Engines & Engine Parts                    | 2  |    |
|                            |                               |  | Metal Mills & Foundries                            | 3  |    |
|                            |                               |  | Military Vehicles & Tanks                          | 4  |    |
|                            |                               |  | Motor Vehicles                                     | 5  |    |
|                            |                               |  | Small Vehicles                                     | 6  |    |
|                            |                               | Production Technology & Heavy Machinery  | Agricultural & Construction Machinery & Components | 7  |    |
|                            |                               |  | Air Handling Equipment                             | 8  |    |
|                            |                               |  | Commercial & Service Industry Machinery            | 9  |    |
|                            |                               |  | Industrial Machinery                               | 10   |    |
|                            |                               |  | Moving & Material Handling Equipment               | 11   |    |
|                            |                               |  | Process Equipment & Components                     | 12   |    |
|                            |                               | Upstream Metal Manufacturing             | Iron & Steel Mills & Forging                       | 13   |    |
|                            |                               |  | Metal Processing                                   | 14   |    |
|                            |                               |  | Metal Products                                     | 15   |    |
|                            |                               |  | Wires & Springs                                    | 16   |    |
| Renewable Energy           | Fresno County                 | Electric Power Generation & Transmission | Alternative Electric Power                         | 1  |    |
|                            |                               |  | Electric Power Transmission                        | 2  |    |
|                            |                               |  | Local Utilities                                    | 3  |    |
| Transportation & Logistics | Fresno County                 | Distribution & Electronic Commerce       | Warehousing & Storage                              | 1  |    |

# BROADBAND SERVICE | Coverage Comparison

Percentage of Commercial units with at least one provider advertising internet service at 100/1000 Mbps



**SELECT RECIPIENT TYPE**

- Commercial
- Residential

**SELECT MINIMUM SPEED**  
(Upload / Download)

- 3/25 Mbps
- 20/100 Mbps
- 25/250 Mbps
- 100/1000 Mbps

**SELECT TECHNOLOGY**

- Any Technology
- Fiber
- All Wired (including Fiber)
- All Fixed Wireless

- Greater availability than Fresno County, CA
- Similar availability to Fresno County, CA
- Less availability than Fresno County, CA

0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0% 80.0% 90.0% 100.0%

**PERCENTAGE OF SERVICEABLE ADDRESSES** ★

Sources: Federal Communications Commission (FCC), Fixed Broadband Deployment Data, Form 477; TIP Strategies, Inc.  
 Notes: All data are reported as of December 31, 2023. Speeds are reported in megabits per second (mbps) written as upload speed / download speed. The technologies indicate the portion of the Internet access connection that terminates at the end user's location (premises). Wired technologies include DSL over copper wire, coaxial cables, and fiber optic cables. Fixed wireless technologies refer to signals distributed over radiowaves, such as 4G, 5G, and LTE. Inland Empire refers to the Riverside-San Bernardino-Ontario, CA Metro Area



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# STAKEHOLDER ENGAGEMENT

*Qualitative Analysis*

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# STAKEHOLDER ENGAGEMENT



**16**

## COMMUNITY MEETINGS

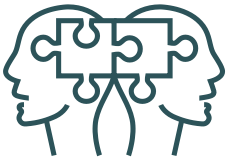
Caruthers area • Clovis • Coalinga • Firebaugh • Fowler • Huron • Kerman • Kingsburg • Mendota • Orange Cove • Parlier • Reedley • San Joaquin • Sanger • Selma • Shaver Lake area



**22**

## ROUNDTABLES & INTERVIEWS

Higher Education • Workforce • Industry and Large Employers • Entrepreneurs & Start-Ups • Real Estate & Development • Economic Development partners • Agriculture industry • Broadband



**38**

## STRATEGY COMMITTEE MEMBERS

5 strategy committee meetings, 1 workshop (project to date)



**200+**

## STAKEHOLDERS ENGAGED



**600+**

## SURVEY PARTICIPANTS

# THE COUNTY TOMORROW

Q8 | Which words best capture your vision for the County of Fresno's economy in the next 10 years?

■ Standardized response (provided)  
■ Open-ended response (write-in)



**FILTER RESPONSES**

**Age Cohort**  
All

**Gender**  
All

**Hispanic or Latino**  
All

**Race**  
All

Source: Survey results compiled by TIP Strategies, Inc.  
Notes: Of the 628 respondents, 511 answered this question. Provided responses were selected from a predefined list of options. Larger fonts indicate higher frequency of responses. Respondents were allowed to select more than one option. Due to limited responses, some age cohorts have been aggregated within the filter.

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# DRAFT SWOT ANALYSIS

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# DRAFT STRENGTHS

## Internal

High Degree of Control (Local, Regional)

- High quality k-12 education systems
- Robust agriculture cluster
- Distribution & logistics sector
- Urban and rural lifestyles
- Success in securing major grants (demonstrated partnerships)
- Renewable energy developments
- Diverse population
- Higher education (serves local population)
- Collaborative cross-sector initiatives (Fresno State's ABE, F3, Good Jobs Challenge, etc.)
- High quality healthcare

## External

Low Degree of Control (State, National, Global)

- National parks and forests
- Geographic location
- Visibility/profile of California

# DRAFT WEAKNESSES

## Internal

High Degree of Control (Local, Regional)

- High percentage of low wage jobs
- Access to high quality and affordable childcare
- Infrastructure lags site development (especially electricity & utilities)
- Resilient infrastructure (lack of groundwater recharge, water quality systems)
- Low housing supply
- Educational attainment varies across the County (skills gap)
- Lack of intermodal facility for ag D&L

## External

Low Degree of Control (State, National, Global)

- Long permitting processes
- Water scarcity
- Escalating utility costs
- Rising insurance costs

# DRAFT OPPORTUNITIES

## Internal

High Degree of Control (Local, Regional)

- Innovation (agtech, healthcare, Fresno State/WET center)
- Economic diversification, FDI
- Fresno airport growth
- Inland port
- Career exposure
- Distribution and logistics industry (hub)
- Outdoor recreation (assets and innovation)
- Quality of place initiatives (downtown/main streets revitalization, parks, etc.)
- Workforce development (upskilling)
- Countywide coordination and collaboration
- Intra-county transportation
- Talent attraction and retention
- Agri-tourism (Food Trail, Blossom Trail, wine industry, etc.)
- Broadband infrastructure

## External

Low Degree of Control (State, National, Global)

- National investments/policies toward reshoring
- Manufacturing investments
- Infrastructure funding (including high speed light rail)
- CA statewide energy plan

# DRAFT THREATS

## Internal

High Degree of Control (Local, Regional)

- Water quality
- Loss of agriculture jobs
- Aging infrastructure, investments not keeping pace with growth
- Fallow land
- Shortage of training staff (ie. nurses can make more in a clinical setting than teaching)
- Talent out migration

## External

Low Degree of Control (State, National, Global)

- Extreme or unprecedented weather patterns
- Trade policy
- Regulations and policies
- Water availability
- Impact automation will have on labor (especially in ag industry, as well as D&L)
- Consolidation of family farms into global conglomerates
- Federal funding programs and opportunities



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# **STRATEGY DISCUSSION**

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[www.menti.com](https://www.menti.com)

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