



2016-2021

3CORE, Inc.

Economic Development District

Comprehensive Economic
Development Strategy



Butte, Glenn and Tehama Counties



SOURCES AND ACKNOWLEDGMENTS

3CORE, Inc. EDD Strategy Committee
South Florida CEDS 2012-2017
Southern Vermont 2014 SMART CEDS Report
Chico Chamber of Commerce – Photo Credit
Chico News & Review – Photo Credit



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INTRODUCTION

Comprehensive Economic Development Strategy (CEDS)

The Comprehensive Economic Development Strategy (CEDS) is a region's playbook or roadmap for engaging in a collaborative, region-wide transformation of the economy in order to raise productivity, create wealth, and increase prosperity for residents.

A successful strategic direction includes three components: a vision statement, goals, and objectives. All of these components should be focused on regionally-driven priorities that build upon gathered data and comprehensive analysis in order to respond to the region's economic development potential and limitations.

As the heart and soul of a region's CEDS, the strategic direction and corresponding action plan should answer the broad questions of "Where do we want the region to go?" and "How are we going to get there?" It is incredibly important to formulate the strategic direction and action plan from the conclusions obtained through the SWOT analysis, risk assessment, and the relevant data provided in the summary background.

3CORE, Inc. serves as the Economic Development District (EDD) for the Economic Development Administration (EDA). Currently, 3CORE is embarking on implementing its CEDS 5-Year Strategy for the years 2016-2021. In January 2016, 3CORE reconvened its Economic Development Strategy Committee under the new EDA guidelines. 3CORE, Inc., has been meeting with its Strategy Committee to understand and assess the current and potential state of the economy for our region that includes Butte, Glenn and Tehama Counties and to develop the Region's 5-Year Strategy.

Now that the region is slowly recovering from the recession of the last 10 years, it is becoming increasingly apparent that regional economic prosperity is linked to an area's ability to prevent, withstand, and quickly recover from major disruptions to its economic base. 3CORE with its Strategy Committee will attempt to address potential risks that could disrupt the stability and flow of its economy by incorporating resiliency strategies moving into the future.

At the regional or community level, 3CORE's role as economic development practitioners is instrumental in building the capacity for economic resilience. Economic development professionals and organizations often become the focal point for post-incident coordination, information dissemination, responding to external inquiries, and the lead grant administrator for federally-funded recovery initiatives.

The CEDS Five-Year Strategy is the culmination of discussions, resource identification and management, gap assessments and project identification. This Five-Year Strategy will plan for the region to participate in inventorying the region's human, physical and financial capital and assessing the readiness of each. Integrated economic development planning provides the flexibility needed to adapt to the varying conditions and limited and to diminishing public resources and to harnessing the region's unique advantages and opportunities.

3CORE, as the District, will continue to strive to identify opportunities where the 3-County Region can connect and work together to move the economy forward to create and retain jobs, sustain established businesses and attract new ones. It will be imperative to identify systems, processes and policies that can be shared among multiple jurisdictions and partners to increase communication, efficiency, and productivity.

Goals of the CEDS

Economic Development efforts in the Tri County Region have historically occurred individually among each community without a concerted, coordinated effort. Currently the Strategy Committee is working to identify and combine goals and objectives that will benefit the region as a whole, while also recognizing the needs and challenges that must be addressed in order for the economy to move forward.

The Strategy Committee has committed to creating an effective process to accomplish its goals and has adopted the principles shared with Southern Vermont. The principles are as follows:

- **Process**—based on proven best practices for regional community economic development and open, transparent collaboration.
- **Regional focus**—coordinating and leveraging assets at the regional level in order to compete successfully in the global economy.
- **Asset-based**—focus on indigenous assets and home-grown competitive advantage rather than defining strategies around what the region lacks.
- **Diversified**—regional resiliency requires diversification in order to weather downturns and navigate economic change successfully.
- **Measureable strategy**—informed by trends, relevant to the true priorities of the region, and focused on tangible progress.
- **Disciplined and consistent**—open collaboration requires a commitment to broad participation but recognition that all ideas are not equal and priorities matter in order to be successful.

The Strategy Committee also strives to tackle initiatives and projects meet the SMART criteria:

- Specific
- Measurable
- Achievable
- Relevant
- Time Based

About 3CORE, Inc.

After substantial organizational planning, Butte, Glenn, and Tehama Counties, with the State of California's recognition, agreed on an "Intent to form an Economic Development District" in 1985. The counties then formed the Tri-County Economic Development Corporation to represent the District (which had a name change in October 2009 to 3CORE). Shortly thereafter, in September of 1985, the United States Economic Development Administration (EDA) approved the formation of the Tri-County Economic Development District (now 3CORE Economic Development District) in accordance with Section 301 (b) of the Public Works and Economic Development Act of 1965, under the terms of Public Law 89-126, as amended. 3CORE is currently a designated non-profit corporation under the authority of section 23701 (f) of the Revenue and Taxation Code of California. Hereafter, 3CORE will be referred to as "District".



3CORE is a **financial go-between** that connects the tri-county region with private investment, charitable donations, and public funding that help local businesses and communities grow and create or retain jobs.

3CORE forms **partnerships and strategies** with private, non-profit, and public organizations committed to fulfilling this value proposition.

Tools include:

- Federally-designated Economic Development District
- State licensed lender
- State and Federally-designated Community Development Financial Institution
- Private, non-profit charitable corporation
- Authorized lender under the State Capital Access Program & State Loan Guarantee Program
- Memberships
 - the California Economic Summit
 - California Association for Local Economic Development
 - California Association for Microenterprise Opportunity
 - California Finance Consortium
 - Opportunity Finance Network

The District was established to act as the economic development planning and coordinating organization for the counties of Butte, Glenn, and Tehama and its cities and towns located within. Initial identified goals of the District were to encourage new employment opportunities; foster a stable and diversified local economy; and, alleviate the persistent unemployment in the Tri-County area. Since that time, the District has continuously modified its business development services to maintain relevancy and impact in the Tri-County region. A major focus for the upcoming years will be on the Millennials and how they approach working; creating businesses; strengthening existing, emerging and growing sectors; building and supporting an entrepreneurial ecosystem; and' maneuvering in an ever-changing economy – particularly in a rural region. Additionally, the District has heard a resounding message from the Region regarding the need to address academic and vocational education programs. The District will continue to identify a variety of funding sources to provide much-needed to capital to its businesses located throughout the Region.

CEDS STRATEGY COMMITTEE

During 2015-16, the District has rebuilt its Strategy Committee to include contributing members from various industries and jurisdictions to develop the 5-Year Economic and Resiliency Strategy for the region under the new EDA CEDS regulations.

3CORE, as the District, worked with the Strategy Committee to set a meeting schedule, establish goals, determine collection of regional information from jurisdictional partners and create strategy plan for the region. Activities at the meetings included inventory of risk assessment, conducting a SWOT analysis focused on natural hazards and economic development, collecting qualitative information about the impacts of previous events on businesses and the economy, and gathering input on mitigation strategies to then integrate plans for vulnerabilities and opportunities into the CEDS. Since January 2016, the District has held four Strategy Committee meetings. The CEDS will be the road map for the Strategy Committee for the upcoming years with the expectation of completing annual updates.

A successful strategic direction includes three components: a vision statement, goals, and objectives. All of these components should be focused on regionally-driven priorities that build upon gathered data and comprehensive analysis in order to respond to the region's economic development potential and limitations.

The efforts, goals and objectives outlined in the CEDS 5-Year Strategy will primarily focus on the following sectors: agriculture, manufacturing, entrepreneurship, technology, healthcare, education and their subsequent niche markets.

3CORE EDD Strategy Committee FY 2016-17

James Brock	Farmer	Tehama County
Bob Williams	Rancher/BOS	Tehama County
Andrew Christ	Private Business	Tehama County
Linda Zorn	Butte College	Butte & Glenn Counties
Katie Simmons	Chico Chamber	Butte County
Ed Mayer	Housing Authority	Butte County
Jack Coots	Ag Service Provider	Butte County
Colleen Robb	CSU, Chico College of Business	Butte, Glenn & Tehama Counties
Tony Cardenas	Private Business/City Council	Corning
Bill Gaines	Private Business	Butte County
Christine Zoppi	Health & Human Services	Glenn County
Jody Samons	Community Development Dir.	Glenn County
Noelle Ferdon	Farm Credit	Butte County
Luis Moreno	AFWD	Northern CA
Andrea Campos	NoRTEC	Northern CA
Jake Brimlow	CSU, Chico – Ag Department	Northern CA
Maya Grunder	Manufacturing Intern	Butte, Glenn & Tehama Counties
Pete Carr	City Manager	Orland/Glenn County
Clay Parker	Mayor	City of Red Bluff/Tehama County
Chris Constantine	Assistant City Manager	City of Chico
Debbie Collins	Management Analyst	City of Chico

REGIONAL ECONOMY

The District includes Butte, Glenn, and Tehama counties and its cities and towns located within. Historically, the predominance of agriculture, timber-related, and government employment in the economic profile has resulted in severe economic deterioration in the District, including unemployment rates that have greatly exceeded the US average unemployment rate over an extended period of time. Dependence on single industries has resulted in lack of diversification limiting the region’s ability to be resilient in times of business closure and/or relocation.

In the past two years, the region has made a concerted effort to focus on diversifying its industries with a renewed interest in collaborative efforts, shared resources and enhanced training programs. For example, the manufacturing sector leaders have taken the lead to work with our local community colleges and our local high schools to create vocational programs to encourage and train our young workers in the region. Additionally, many manufacturing businesses now offer internships and apprenticeships to students who are in high school or are older.

The District and the region have made a concerted effort to focus on the identification and development of emerging entrepreneurs.

90% of the businesses located in our region of Butte, Glenn and Tehama counties employ less than 20 people. Over the past few years, access to training, access to credit and access to industry experts has become more difficult for small- and medium-sized businesses. This limited access to resources has created even more challenges for those



trying to grow or expand their business, particularly those that are categorized as low- to moderately-low income. Providing programs and services to better educate our businesses on knowing where money comes from, where it goes as well having an understanding of how money works and knowing how decisions directly affect profitability. This knowledge helps to build a solid foundation for growth, expansion and financial credibility.

Despite the challenging economy of our region, many entrepreneurs are venturing to start or expand their small businesses. According to the SBA, as of April 2014, the following numbers of businesses sized 1-19 employees exist in the three counties: Butte - 11,964; Glenn - 1,561; Tehama - 2,699. Providing small businesses with financial literacy and readiness training and mentoring will support their growth, ability to hire and their potential to become credit-worthy banking clients. Businesses that are ready to hire would be connected with our partnering agency, the Alliance for Workforce Development to assist with recruitment, HR and training.

The Northern California region has identified the need to engage the private sector in a more meaningful way regarding the overall growth and development of its workforce, academic and vocational training programs, access to capital, mentoring and overall decision-making processes.

The CEDS provides a vehicle for individuals, organizations, local governments, institutes of learning, and private industry to engage in a meaningful conversation and debate about what capacity building efforts would best serve economic development in the region. The CEDS should take into account and, where appropriate, integrate or leverage other regional planning efforts, including the use of other available federal funds, private sector resources, and state support which can advance a region's CEDS goals and objectives

BUTTE COUNTY DEMOGRAPHIC PROFILE

Butte County – Situated on the east side of Northern California’s Sacramento Valley, Butte County is approximately 110 miles north of Sacramento. Rising from the Sacramento River, its western boundary, to the Sierra Nevada Mountains, its eastern perimeter, Butte County elevation spans from 60 to over 7,000 feet and has a considerable variation in climate. The portion of the county lying in the Sacramento Valley has ideal conditions for agriculture. The county covers 1,665 square miles. Butte County’s population is just over 220,000.

In 2015, the population in Butte County, California was 225,411. Between 2005 and 2015, the region’s population grew at an annual average rate of 0.5%.

The region has a civilian labor force of 101,597 with a participation rate of 55.9%. Of individuals 25 to 64 in Butte County, California, 25.1% have a bachelor’s degree or higher which compares with 30.9% in the nation. The median household income in Butte County, California is \$43,165 and the median house value is \$220,100.

Summary ¹						
	Percent			Value		
	Butte County, California	California	USA	Butte County, California	California	USA
Demographics						
Population ²	—	—	—	225,411	39,144,818	321,418,820
Population Annual Average Growth ²	0.5%	0.9%	0.8%	1,066	331,688	2,590,222
Median Age ³	—	—	—	37.2	35.2	37.2
Under 18 Years	21.0%	25.0%	24.0%	46,168	9,295,040	74,181,467
18 to 24 Years	14.7%	10.5%	9.9%	32,250	3,922,951	30,672,088
25 to 34 Years	12.1%	14.3%	13.3%	26,681	5,317,877	41,063,948
35 to 44 Years	10.6%	13.9%	13.3%	23,329	5,182,710	41,070,606
45 to 54 Years	13.1%	14.1%	14.6%	28,877	5,252,371	45,006,716
55 to 64 Years	13.1%	10.8%	11.8%	28,878	4,036,493	36,482,729
65 to 74 Years	7.8%	6.1%	7.0%	17,185	2,275,336	21,713,429
75 Years, and Over	7.6%	5.3%	6.0%	16,632	1,971,178	18,554,555
Race: White	81.9%	57.6%	72.4%	180,096	21,453,934	223,553,265
Race: Black or African American	1.6%	6.2%	12.6%	3,415	2,299,072	38,929,319
Race: American Indian and Alaska Native	2.0%	1.0%	0.9%	4,395	362,801	2,932,248
Race: Asian	4.1%	13.0%	4.8%	9,057	4,861,007	14,674,252
Race: Native Hawaiian and Other Pacific Islander	0.2%	0.4%	0.2%	452	144,386	540,013
Race: Some Other Race	5.5%	17.0%	6.2%	12,141	6,317,372	19,107,368
Race: Two or More Races	4.7%	4.9%	2.9%	10,444	1,815,384	9,009,073
Hispanic or Latino (of any race)	14.1%	37.6%	16.3%	31,116	14,013,719	50,477,594
Economic						
Labor Force Participation Rate and Size (civilian population 16 years and over) ⁴	55.9%	63.4%	63.5%	101,597	18,975,006	157,940,014
Armed Forces Labor Force ⁴	0.1%	0.4%	0.4%	240	133,870	1,025,497
Veterans, Age 18-64 ⁴	5.7%	4.0%	5.8%	7,917	968,466	11,371,344
Median Household Income ^{3,4}	—	—	—	\$43,165	\$61,489	\$53,482

Summary ¹						
	Percent			Value		
	Butte County, California	California	USA	Butte County, California	California	USA
Per Capita Income ^{3,4}	—	—	—	\$24,430	\$29,906	\$28,555
Poverty Level (of all people) ⁴	21.5%	16.4%	15.6%	46,643	6,115,244	47,755,606
Households Receiving Food Stamps ⁴	11.3%	8.7%	13.0%	9,626	1,102,641	15,089,358
Mean Commute Time (minutes) ⁴	—	—	—	20.1	27.6	25.7
Commute via Public Transportation ⁴	1.2%	5.2%	5.1%	982	859,372	7,157,671
Union Membership ⁵	20.5%	16.4%	11.1%	—	—	—
Educational Attainment, Age 25-64						
No High School Diploma ⁴	11.2%	17.7%	12.0%	11,923	3,582,292	19,939,890
High School Graduate ⁴	22.0%	20.3%	26.5%	23,347	4,103,854	44,000,387
Some College, No Degree ⁴	31.2%	22.4%	21.9%	33,066	4,530,225	36,270,359
Associate's Degree ⁴	10.5%	8.0%	8.7%	11,118	1,620,584	14,487,486
Bachelor's Degree ⁴	17.5%	20.4%	19.7%	18,580	4,131,150	32,646,533
Postgraduate Degree ⁴	7.6%	11.3%	11.2%	8,079	2,279,854	18,533,513
Housing						
Total Housing Units ⁴	—	—	—	96,700	13,781,929	132,741,033
Median House Value (of owner-occupied units) ^{3,4}	—	—	—	\$220,100	\$371,400	\$175,700
Homeowner Vacancy ⁴	1.8%	1.6%	2.1%	939	114,943	1,591,421
Rental Vacancy ⁴	4.9%	4.6%	6.9%	1,819	275,877	3,105,361
Renter-Occupied Housing Units (% of Occupied Units) ⁴	40.6%	45.2%	35.6%	34,622	5,708,355	41,423,632
Occupied Housing Units with No Vehicle Available (% of Occupied Units) ⁴	7.1%	7.8%	9.1%	6,091	984,914	10,594,153
Social						
Enrolled in Grade 12 (% of total population) ⁴	1.3%	1.6%	1.4%	2,848	627,396	4,443,768
Disconnected Youth ^{4,6}	2.2%	2.7%	3.3%	299	59,427	572,277
Children in Single Parent Families (% of all children) ⁴	35.5%	33.8%	34.7%	15,036	2,969,144	24,388,185
Disabled, Age 18-64 ⁴	14.9%	8.0%	10.2%	20,764	1,916,028	19,703,061
Disabled, Age 18-64, Labor Force Participation Rate and Size ⁴	32.4%	40.5%	41.2%	6,736	776,518	8,119,295
Foreign Born ⁴	7.6%	27.0%	13.1%	16,769	10,290,636	41,056,885
Speak English Less Than Very Well (population 5 yrs and over) ⁴	5.5%	19.1%	8.6%	11,608	6,789,522	25,305,202

Source: [JobsEQ@](#)

1. Census 2010, unless noted otherwise

2. Census 2015, annual average growth rate since 2005

3. Median values for certain aggregate regions (such as MSAs) may be estimated as the weighted averages of the median values from the composing counties.

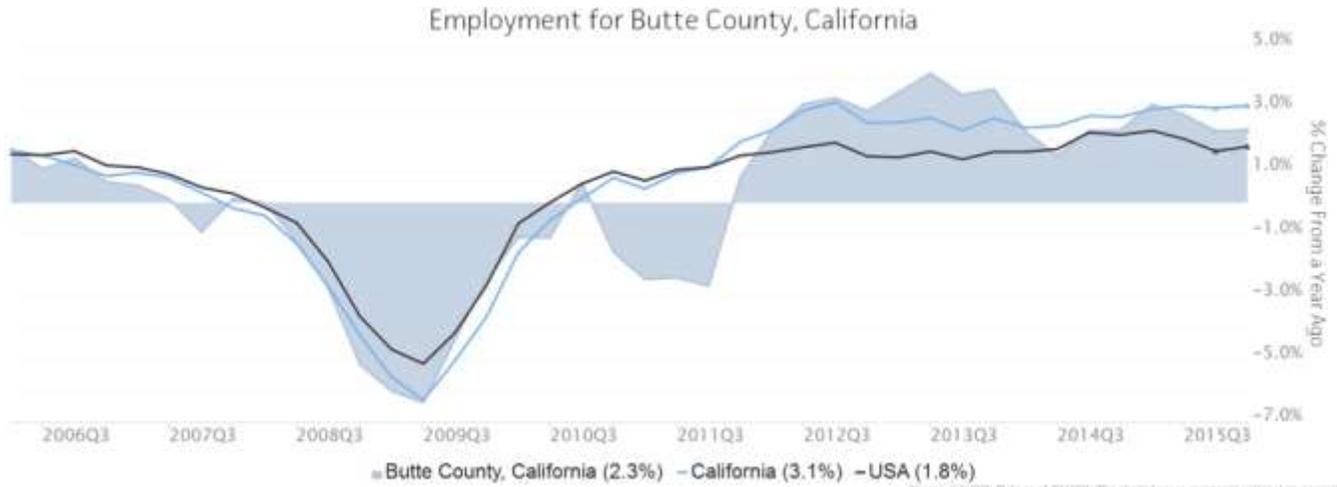
4. ACS 2010-2014

5. 2014; Current Population Survey, unionstats.com, and Chmura; county- and zip-level data are best estimates based upon industry-, MSA-, and state-level data

6. Disconnected Youth are 16-19 year olds who are (1) not in school, (2) not high school graduates, and (3) either unemployed or not in the labor force.

Employment Trends

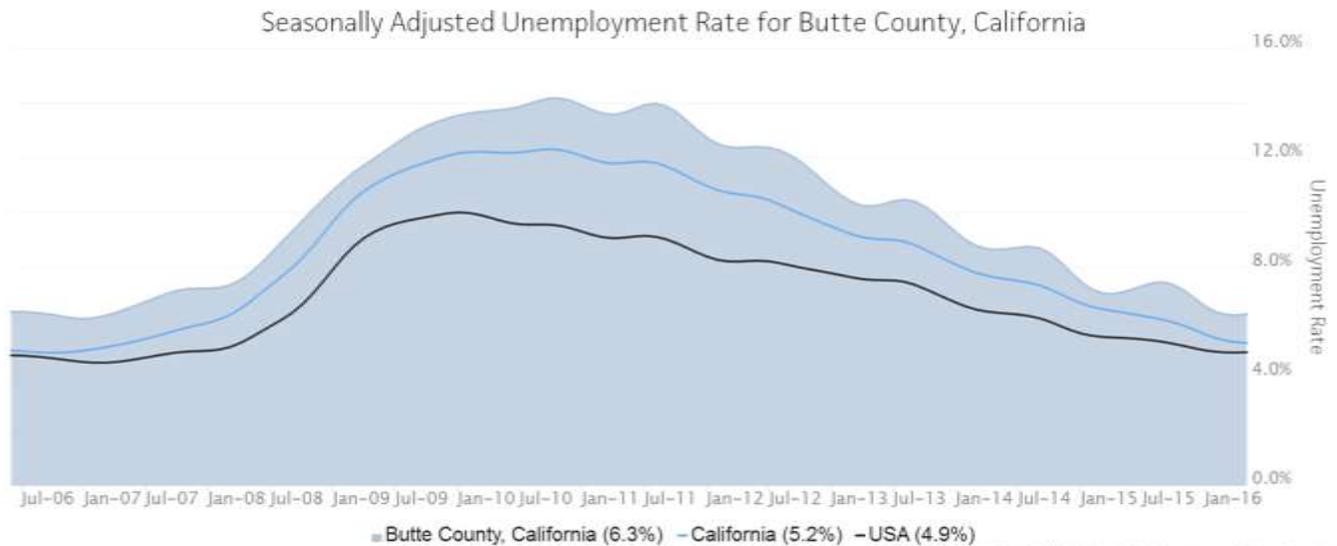
As of 2016Q1, total employment for Butte County, California was 85,135 (based on a four-quarter moving average). Over the year ending 2016Q1, employment increased 2.3% in the region.



Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1.

Unemployment Rate

The seasonally adjusted unemployment rate for Butte County, California was 6.3% as of May 2016. The regional unemployment rate was higher than the national rate of 4.9%. One year earlier, in May 2015, the unemployment rate in Butte County, California was 7.1%.

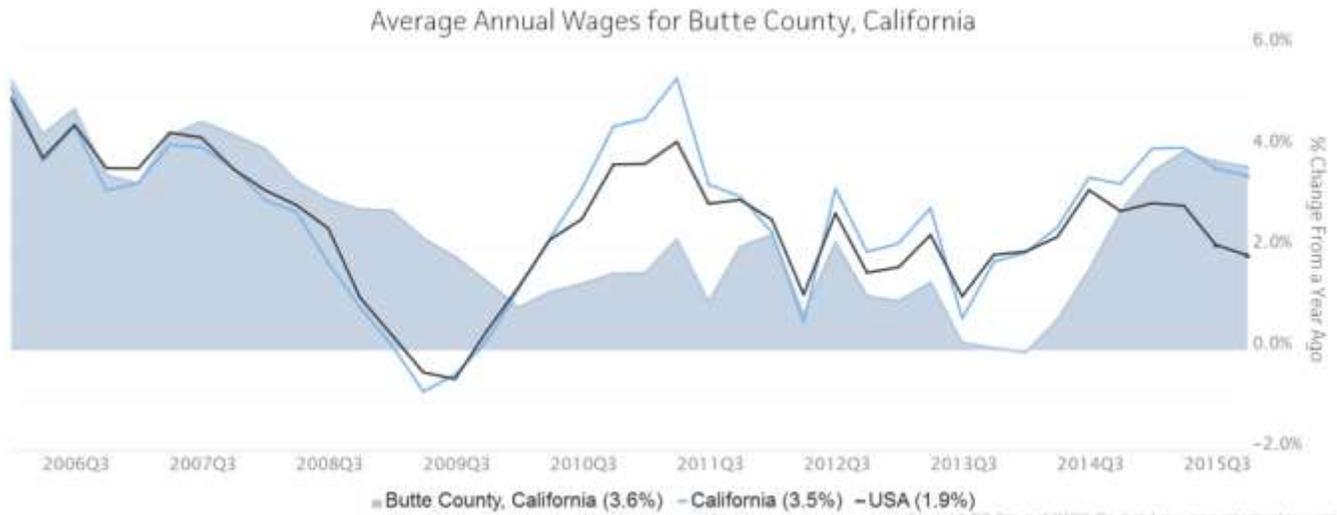


Unemployment rate data are from the Local Area Unemployment Statistics, provided by the Bureau of Labor Statistics and updated through May 2016.



Wage Trends

The average worker in Butte County, California earned annual wages of \$39,294 as of 2016Q1. Average annual wages per worker increased 3.6% in the region during the preceding four quarters. For comparison purposes, annual average wages were \$51,614 in the nation as of 2016Q1.



Annual average wages per worker data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1.

Cost of Living Index

The Cost of Living Index estimates the relative price levels for consumer goods and services. When applied to wages and salaries, the result is a measure of relative purchasing power. The cost of living is 14.3% higher in Butte County, California than the U.S. average.

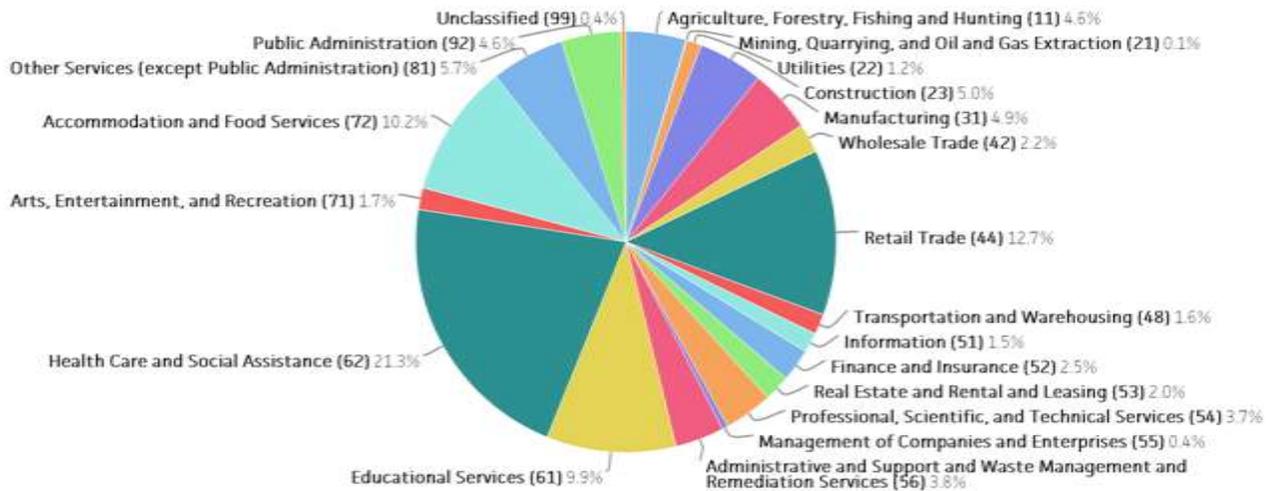
Cost of Living Information			
	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
Butte County, California	\$38,814	114.3	\$33,966
California	\$61,602	154.6	\$39,857
USA	\$52,595	100.0	\$52,595

Source: JobsEQ@
 Data as of 2016Q1
 The Cost of Living Index is developed by Chmura Economics & Analytics and is updated quarterly.

Industry Snapshot

The largest sector in Butte County, California is Health Care and Social Assistance, employing 18,169 workers. The next-largest sectors in the region are Retail Trade (10,817 workers) and Accommodation and Food Services (8,709). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Agriculture, Forestry, Fishing and Hunting (LQ = 3.14), Utilities (2.13), and Health Care and Social Assistance (1.52).

Total Workers for Butte County, California by Industry



Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1. Source: 3coreEDP, Data as of 2016Q1

Sectors in Butte County, California with the highest average wages per worker are Utilities (\$97,536), Finance and Insurance (\$67,130), and Management of Companies and Enterprises (\$62,696). Regional sectors with the best job growth (or most moderate job losses) over the last 5 years are Health Care and Social Assistance (+4,551 jobs), Accommodation and Food Services (+2,392), and Retail Trade (+995). Over the next 10 years, employment in Butte County, California is projected to expand by 3,187 jobs. The fastest growing sector in the region is expected to be Health Care and Social Assistance with a +1.3% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+2,439 jobs), Educational Services (+350), and Construction (+328).

		Current			Total Change over the Last 5 Years	Historical			Forecast		
		Four Quarters Ending with 2016q1				Average Annual % Change in Employment 2011q1-2016q1			Over the Next 10 Years		
NAICS	Industry	Empl	Avg. Annual Wages	Location Quotient	Empl	Butte County, California	California	USA	Total Approx Repl Demand	Total Growth Demand	Avg. Annual Growth Percent
11	Agriculture, Forestry, Fishing and Hunting	3,934	\$46,009	3.14	188	1.0%	1.6%	1.0%	1,329	-299	-0.8%
21	Mining, Quarrying, and Oil and Gas Extraction	57	\$52,526	0.14	25	12.1%	0.3%	1.3%	13	-2	-0.4%
22	Utilities	984	\$97,536	2.13	299	7.5%	0.2%	0.1%	242	-68	-0.7%
23	Construction	4,253	\$43,598	0.92	775	4.1%	4.5%	2.4%	860	328	0.7%
31	Manufacturing	4,129	\$44,134	0.58	305	1.5%	0.8%	1.3%	919	-332	-0.8%
42	Wholesale Trade	1,907	\$53,558	0.56	105	1.1%	2.1%	1.4%	419	5	0.0%
44	Retail Trade	10,817	\$30,163	1.17	995	1.9%	1.8%	1.5%	3,363	188	0.2%
48	Transportation and Warehousing	1,326	\$46,301	0.38	-199	-2.8%	3.0%	2.2%	333	-91	-0.7%
51	Information	1,296	\$45,348	0.76	13	0.2%	2.4%	0.4%	300	-94	-0.8%
52	Finance and Insurance	2,146	\$67,130	0.63	-774	-6.0%	0.5%	0.9%	508	42	0.2%
53	Real Estate and Rental and Leasing	1,701	\$37,287	1.18	-30	-0.4%	1.3%	1.4%	383	54	0.3%
54	Professional, Scientific, and Technical Services	3,186	\$53,743	0.57	248	1.6%	2.9%	2.5%	677	237	0.7%
55	Management of Companies and Enterprises	367	\$62,696	0.29	27	1.6%	3.7%	3.5%	78	2	0.1%
56	Administrative and Support and Waste Management and Remediation Services	3,221	\$27,593	0.59	478	3.3%	3.7%	2.9%	738	183	0.6%
61	Educational Services	8,458	\$51,761	1.19	439	1.1%	1.5%	0.4%	1,795	350	0.4%
62	Health Care and Social Assistance	18,169	\$41,514	1.52	4,551	5.9%	6.5%	2.3%	3,683	2,439	1.3%
71	Arts, Entertainment, and Recreation	1,425	\$15,863	0.86	-968	-9.8%	2.1%	1.9%	440	58	0.4%
72	Accommodation and Food Services	8,709	\$18,324	1.16	2,392	6.6%	4.1%	3.0%	3,050	102	0.1%
81	Other Services (except Public Administration)	4,822	\$24,711	1.27	-1,404	-5.0%	-4.8%	-0.1%	1,214	91	0.2%
92	Public Administration	3,915	\$54,859	0.96	68	0.3%	-0.5%	-0.8%	942	-19	0.0%
99	Unclassified	311	\$30,368	2.04	165	16.3%	11.4%	12.0%	77	12	0.4%
	Total - All Industries	85,135	\$39,294	1.00	7,696	1.9%	2.4%	1.6%	20,986	3,187	0.4%

Source: [JobsEQ®](#)

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1. Forecast employment growth uses national projections adapted for regional growth patterns.

Occupation Snapshot

The largest major occupation group in Butte County, California is Office and Administrative Support Occupations, employing 11,507 workers. The next-largest occupation groups in the region are Food Preparation and Serving Related Occupations (8,707 workers) and Sales and Related Occupations (8,680). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Farming, Fishing, and Forestry Occupations (LQ = 3.74), Personal Care and Service Occupations (1.67), and Healthcare Support Occupations (1.38).

Occupation groups in Butte County, California with the highest average wages per worker are Management Occupations (\$90,600), Healthcare Practitioners and Technical Occupations (\$87,600), and Legal Occupations (\$83,700). The unemployment rate in the region varied among the major groups from 2.0% among Legal Occupations to 18.6% among Farming, Fishing, and Forestry Occupations.

Over the next 10 years, the fastest growing occupation group in Butte County, California is expected to be Healthcare Support Occupations with a +1.5% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Healthcare Practitioners and Technical Occupations (+671 jobs) and Personal Care and Service Occupations (+606). Over the same period, the highest replacement demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Food Preparation and Serving Related Occupations (3,350 jobs) and Sales and Related Occupations (2,851).

SOC	Title	Current					Total Change over the Last 5 Years	Historical			Forecast				
		Four Quarters Ending with 2016q1			2016q1			Empl	Avg Ann % Chg in Empl 2011q1-2016q1			Over the Next 10 Years			
		Empl	Avg. Annual Wages ¹	LQ	Unempl	Unempl Rate			Butte County, California	California	USA	Current Online Job Ads ²	Total Repl Demand	Total Growth Demand	Avg. Annual Growth Percent
11-0000	Management Occupations	5,087	\$90,600	0.99	137	2.7%	264	1.1%	2.0%	1.4%	42	1,847	20	0.0%	
13-0000	Business and Financial Operations Occupations	2,928	\$64,500	0.70	170	5.5%	-112	-0.7%	1.9%	1.5%	30	655	191	0.6%	
15-0000	Computer and Mathematical Occupations	1,315	\$69,300	0.56	65	4.6%	30	0.5%	4.1%	2.7%	13	204	138	1.0%	
17-0000	Architecture and Engineering Occupations	780	\$83,300	0.54	52	6.1%	176	5.2%	1.4%	1.3%	2	193	6	0.1%	
19-0000	Life, Physical, and Social Science Occupations	547	\$61,300	0.80	27	4.8%	45	1.7%	1.6%	1.0%	1	177	27	0.5%	
21-	Community and Social	1,779	\$47,700	1.31	79	4.5%	335	4.3%	4.4%	1.4%	16	390	154	0.8%	

Occupation Snapshot in Butte County, California														
SOC	Title	Current					Total Change over the Last 5 Years	Historical			Forecast			
		Four Quarters Ending with 2016q1			2016q1			Avg Ann % Chg in Empl 2011q1-2016q1			Over the Next 10 Years			
		Empl	Avg. Annual Wages ¹	LQ	Unempl	Unempl Rate		Empl	Butte County, California	California	USA	Current Online Job Ads ²	Total Repl Demand	Total Growth Demand
0000	Service Occupations													
23-0000	Legal Occupations	467	\$83,700	0.69	10	2.0%	1	0.0%	0.6%	0.1%	0	93	20	0.4%
25-0000	Education, Training, and Library Occupations	5,603	\$56,300	1.16	160	2.9%	333	1.2%	1.7%	0.4%	33	1,199	328	0.6%
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	1,325	\$47,100	0.90	73	5.4%	57	0.9%	1.5%	1.0%	13	464	-3	0.0%
29-0000	Healthcare Practitioners and Technical Occupations	6,135	\$87,600	1.28	144	2.4%	518	1.8%	2.2%	1.4%	81	1,348	671	1.0%
31-0000	Healthcare Support Occupations	3,455	\$30,400	1.38	234	6.7%	834	5.7%	6.3%	2.2%	27	753	553	1.5%
33-0000	Protective Service Occupations	1,478	\$52,600	0.90	115	7.0%	36	0.5%	1.3%	0.6%	7	374	18	0.1%
35-0000	Food Preparation and Serving Related Occupations	8,707	\$23,900	1.19	1,146	12.2%	1,642	4.3%	4.0%	2.9%	24	3,350	231	0.3%
37-0000	Building and Grounds Cleaning and Maintenance Occupations	3,140	\$28,300	1.02	460	13.4%	-438	-2.6%	-1.8%	1.0%	8	720	106	0.3%
39-0000	Personal Care and Service Occupations	5,675	\$24,300	1.67	424	7.3%	1,284	5.3%	4.9%	2.2%	19	1,229	606	1.0%
41-0000	Sales and Related Occupations	8,680	\$36,300	0.97	677	7.5%	359	0.8%	1.8%	1.4%	110	2,851	-3	0.0%
43-0000	Office and Administrative Support Occupations	11,507	\$34,800	0.90	1,151	9.2%	675	1.2%	2.2%	1.6%	137	2,463	-29	0.0%
45-0000	Farming, Fishing, and Forestry Occupations	2,057	\$24,700	3.74	451	18.6%	86	0.9%	1.9%	1.4%	0	586	-157	-0.8%
47-0000	Construction and Extraction Occupations	3,407	\$49,300	0.90	550	14.3%	524	3.4%	3.8%	2.0%	6	645	260	0.7%
49-0000	Installation, Maintenance, and Repair Occupations	3,098	\$43,900	0.95	259	7.9%	323	2.2%	2.4%	1.7%	13	786	104	0.3%
51-0000	Production Occupations	3,590	\$34,500	0.68	388	10.0%	407	2.4%	1.7%	1.7%	4	953	-133	-0.4%
53-0000	Transportation and Material Moving Occupations	4,376	\$35,300	0.76	547	11.2%	318	1.5%	3.1%	2.2%	17	1,154	71	0.2%
00-0000	Total - All Occupations	85,135	\$44,500	1.00	n/a	n/a	7,696	1.9%	2.4%	1.6%	603	22,435	3,180	0.4%

Source: [JobsEQ®](#)

Data as of 2016Q1 unless noted otherwise

Note: Figures may not sum due to rounding.

1. Occupation wages are as of 2015 and should be taken as the average for all Covered Employment

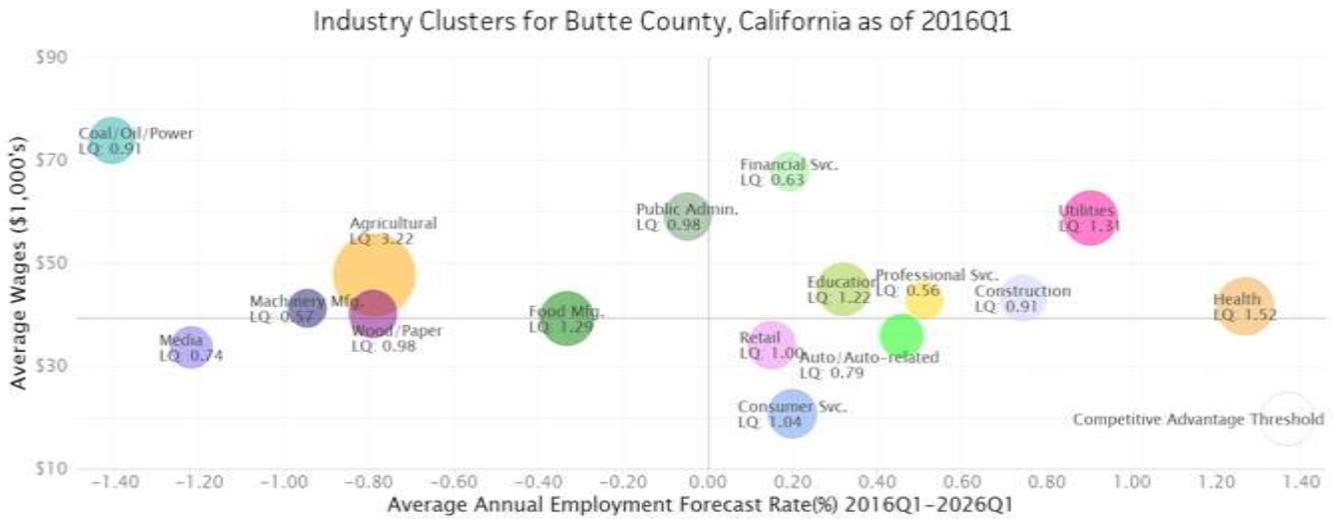
2. Data represent found online ads active within the last thirty days in any zip code intersecting or within the selected region; data represents a sampling rather than the complete universe of postings; the listing search uses keywords that are similar to but not the equivalent of the SOC occupation definitions.

Occupation employment data are estimated via industry employment data and the estimated industry/occupation mix. Industry employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and currently updated through 2015Q3, imputed where necessary with preliminary estimates updated to 2016Q1. Wages by occupation are as of 2015 provided by the BLS and imputed where necessary. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.



Industry Clusters

A cluster is a geographic concentration of interrelated industries or occupations. The industry cluster in Butte County, California with the highest relative concentration is Agricultural with a location quotient of 3.22. This cluster employs 4,164 workers in the region with an average wage of \$47,704. Employment in the Agricultural cluster is projected to contract in the region about 0.8% per year over the next ten years.

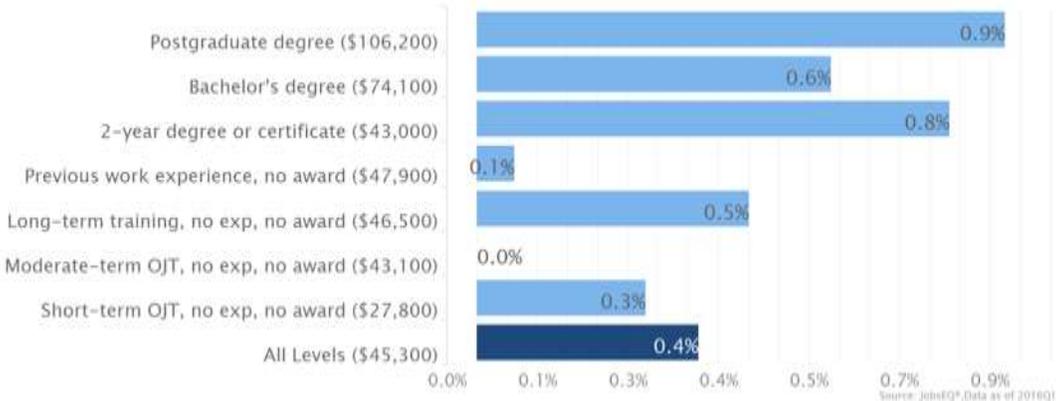


Location quotient and average wage data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics, imputed where necessary, and updated through 2015Q3 with preliminary estimates updated to 2016Q1. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns. Source: JobEQ® Data as of 2016Q1

Education Levels

Expected growth rates for occupations vary by the education and training required. While all employment in Butte County, California is projected to grow 0.4% over the next ten years, occupations typically requiring a postgraduate degree are expected to grow 0.9% per year, those requiring a bachelor’s degree are forecast to grow 0.6% per year, and occupations typically needing a 2-year degree or certificate are expected to grow 0.8% per year.

Annual Average Projected Job Growth by Training Required for Butte County, California



Employment by occupation data are estimates are as of 2016Q1. Education levels of occupations are based on BLS assignments. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

GLENN COUNTY DEMOGRAPHIC PROFILE

Glenn County – Extending across the west-central portion of the Sacramento Valley along Interstate 5, Glenn County lies in the midway point between the metropolitan areas of Sacramento and Redding. The county’s 1,319 square miles are divided between farmland on the floor of the valley and grazing land and mountainous forests in the eastern part of the Mendocino National Forest. Glenn County’s population is just below 28,000.

In 2015, the population in Glenn County, California was 28,017. Between 2005 and 2015, the region’s population grew at an annual average rate of 0.2%.

The region has a civilian labor force of 12,175 with a participation rate of 57.5%. Of individuals 25 to 64 in Glenn County, California, 15.3% have a bachelor’s degree or higher which compares with 30.9% in the nation.

The median household income in Glenn County, California is \$40,106 and the median house value is \$214,600.

Summary ¹						
	Percent			Value		
	Glenn County, California	California	USA	Glenn County, California	California	USA
Demographics						
Population ²	—	—	—	28,017	39,144,818	321,418,820
Population Annual Average Growth ²	0.2%	0.9%	0.8%	62	331,688	2,590,222
Median Age ³	—	—	—	35.3	35.2	37.2
Under 18 Years	28.0%	25.0%	24.0%	7,865	9,295,040	74,181,467
18 to 24 Years	9.2%	10.5%	9.9%	2,581	3,922,951	30,672,088
25 to 34 Years	12.5%	14.3%	13.3%	3,510	5,317,877	41,063,948
35 to 44 Years	11.9%	13.9%	13.3%	3,343	5,182,710	41,070,606
45 to 54 Years	13.6%	14.1%	14.6%	3,835	5,252,371	45,006,716
55 to 64 Years	11.6%	10.8%	11.8%	3,251	4,036,493	36,482,729
65 to 74 Years	7.3%	6.1%	7.0%	2,046	2,275,336	21,713,429
75 Years, and Over	6.0%	5.3%	6.0%	1,691	1,971,178	18,554,555
Race: White	71.1%	57.6%	72.4%	19,990	21,453,934	223,553,265
Race: Black or African American	0.8%	6.2%	12.6%	231	2,299,072	38,929,319
Race: American Indian and Alaska Native	2.2%	1.0%	0.9%	619	362,801	2,932,248
Race: Asian	2.6%	13.0%	4.8%	722	4,861,007	14,674,252
Race: Native Hawaiian and Other Pacific Islander	0.1%	0.4%	0.2%	24	144,386	540,013
Race: Some Other Race	19.6%	17.0%	6.2%	5,522	6,317,372	19,107,368
Race: Two or More Races	3.6%	4.9%	2.9%	1,014	1,815,384	9,009,073
Hispanic or Latino (of any race)	37.5%	37.6%	16.3%	10,539	14,013,719	50,477,594
Economic						
Labor Force Participation Rate and Size (civilian population 16 years and over) ⁴	57.5%	63.4%	63.5%	12,175	18,975,006	157,940,014
Armed Forces Labor Force ⁴	0.0%	0.4%	0.4%	3	133,870	1,025,497

Summary ¹						
	Percent			Value		
	Glenn County, California	California	USA	Glenn County, California	California	USA
Veterans, Age 18-64 ⁴	4.6%	4.0%	5.8%	760	968,466	11,371,344
Median Household Income ^{3,4}	—	—	—	\$40,106	\$61,489	\$53,482
Per Capita Income ^{3,4}	—	—	—	\$21,698	\$29,906	\$28,555
Poverty Level (of all people) ⁴	20.0%	16.4%	15.6%	5,517	6,115,244	47,755,606
Households Receiving Food Stamps ⁴	11.1%	8.7%	13.0%	1,064	1,102,641	15,089,358
Mean Commute Time (minutes) ⁴	—	—	—	22.3	27.6	25.7
Commute via Public Transportation ⁴	0.2%	5.2%	5.1%	20	859,372	7,157,671
Union Membership ⁵	26.4%	16.4%	11.1%	—	—	—
Educational Attainment, Age 25-64						
No High School Diploma ⁴	23.6%	17.7%	12.0%	3,278	3,582,292	19,939,890
High School Graduate ⁴	27.5%	20.3%	26.5%	3,818	4,103,854	44,000,387
Some College, No Degree ⁴	26.6%	22.4%	21.9%	3,701	4,530,225	36,270,359
Associate's Degree ⁴	7.0%	8.0%	8.7%	968	1,620,584	14,487,486
Bachelor's Degree ⁴	10.5%	20.4%	19.7%	1,466	4,131,150	32,646,533
Postgraduate Degree ⁴	4.8%	11.3%	11.2%	666	2,279,854	18,533,513
Housing						
Total Housing Units ⁴	—	—	—	10,868	13,781,929	132,741,033
Median House Value (of owner-occupied units) ^{3,4}	—	—	—	\$214,600	\$371,400	\$175,700
Homeowner Vacancy ⁴	1.0%	1.6%	2.1%	59	114,943	1,591,421
Rental Vacancy ⁴	3.7%	4.6%	6.9%	144	275,877	3,105,361
Renter-Occupied Housing Units (% of Occupied Units) ⁴	38.4%	45.2%	35.6%	3,669	5,708,355	41,423,632
Occupied Housing Units with No Vehicle Available (% of Occupied Units) ⁴	7.3%	7.8%	9.1%	694	984,914	10,594,153
Social						
Enrolled in Grade 12 (% of total population) ⁴	2.5%	1.6%	1.4%	714	627,396	4,443,768
Disconnected Youth ^{4,6}	2.8%	2.7%	3.3%	44	59,427	572,277
Children in Single Parent Families (% of all children) ⁴	29.9%	33.8%	34.7%	2,083	2,969,144	24,388,185
Disabled, Age 18-64 ⁴	15.7%	8.0%	10.2%	2,538	1,916,028	19,703,061
Disabled, Age 18-64, Labor Force Participation Rate and Size ⁴	46.3%	40.5%	41.2%	1,175	776,518	8,119,295
Foreign Born ⁴	17.0%	27.0%	13.1%	4,772	10,290,636	41,056,885
Speak English Less Than Very Well (population 5 yrs and over) ⁴	15.3%	19.1%	8.6%	3,976	6,789,522	25,305,202

Source: [JobsEQ@](#)

1, Census 2010, unless noted otherwise

2, Census 2015, annual average growth rate since 2005

3, Median values for certain aggregate regions (such as MSAs) may be estimated as the weighted averages of the median values from the composing counties.

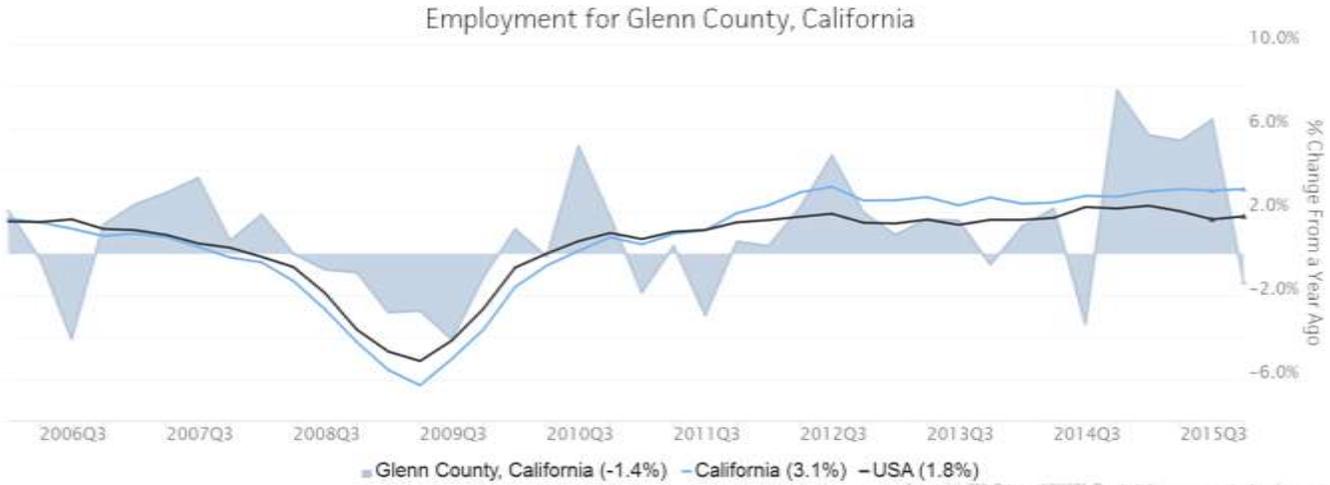
4, ACS 2010-2014

5, 2014; Current Population Survey, unionstats.com, and Chmura; county- and zip-level data are best estimates based upon industry-, MSA-, and state-level data

6, Disconnected Youth are 16-19 year olds who are (1) not in school, (2) not high school graduates, and (3) either unemployed or not in the labor force.

Employment Trends

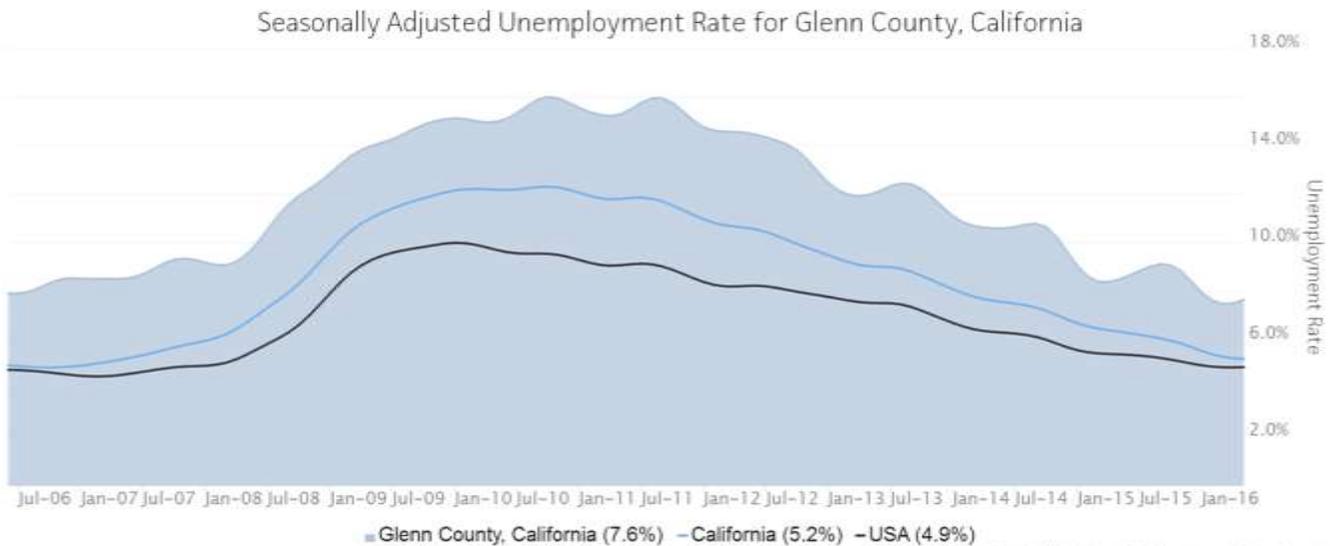
As of 2016Q1, total employment for Glenn County, California was 9,961 (based on a four-quarter moving average). Over the year ending 2016Q1, employment declined 1.4% in the region.



Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1.

Unemployment Rate

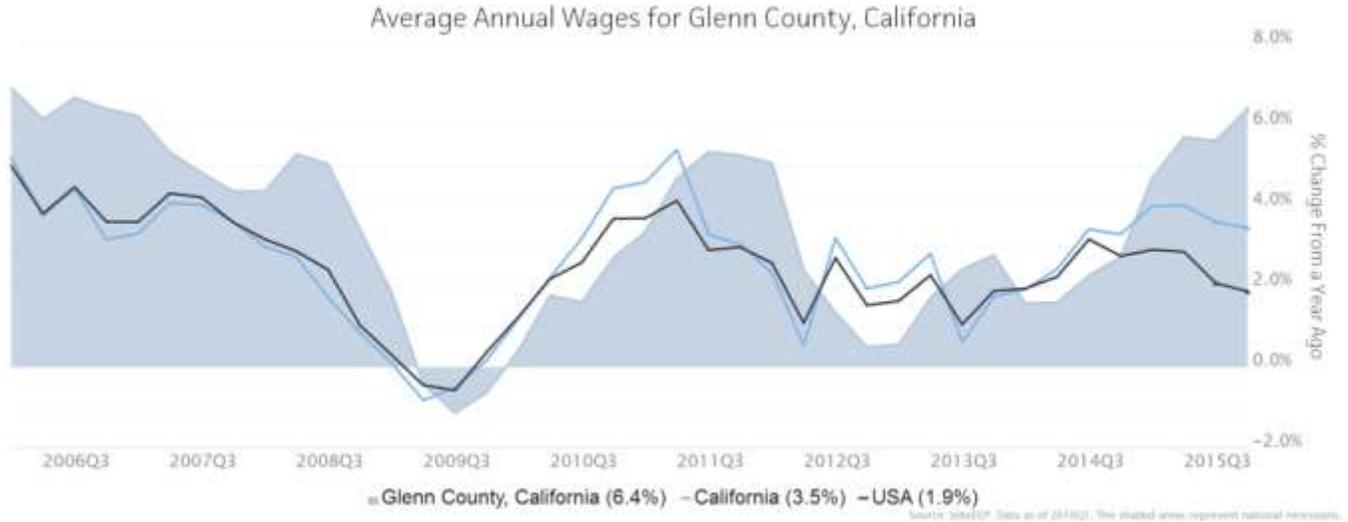
The seasonally adjusted unemployment rate for Glenn County, California was 7.6% as of May 2016. The regional unemployment rate was higher than the national rate of 4.9%. One year earlier, in May 2015, the unemployment rate in Glenn County, California was 8.5%.



Unemployment rate data are from the Local Area Unemployment Statistics, provided by the Bureau of Labor Statistics and updated through May 2016.

Wage Trends

The average worker in Glenn County, California earned annual wages of \$43,136 as of 2016Q1. Average annual wages per worker increased 6.4% in the region during the preceding four quarters. For comparison purposes, annual average wages were \$51,614 in the nation as of 2016Q1.



Annual average wages per worker data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1.

Cost of Living Index

The Cost of Living Index estimates the relative price levels for consumer goods and services. When applied to wages and salaries, the result is a measure of relative purchasing power. The cost of living is 16.1% higher in Glenn County, California than the U.S. average.

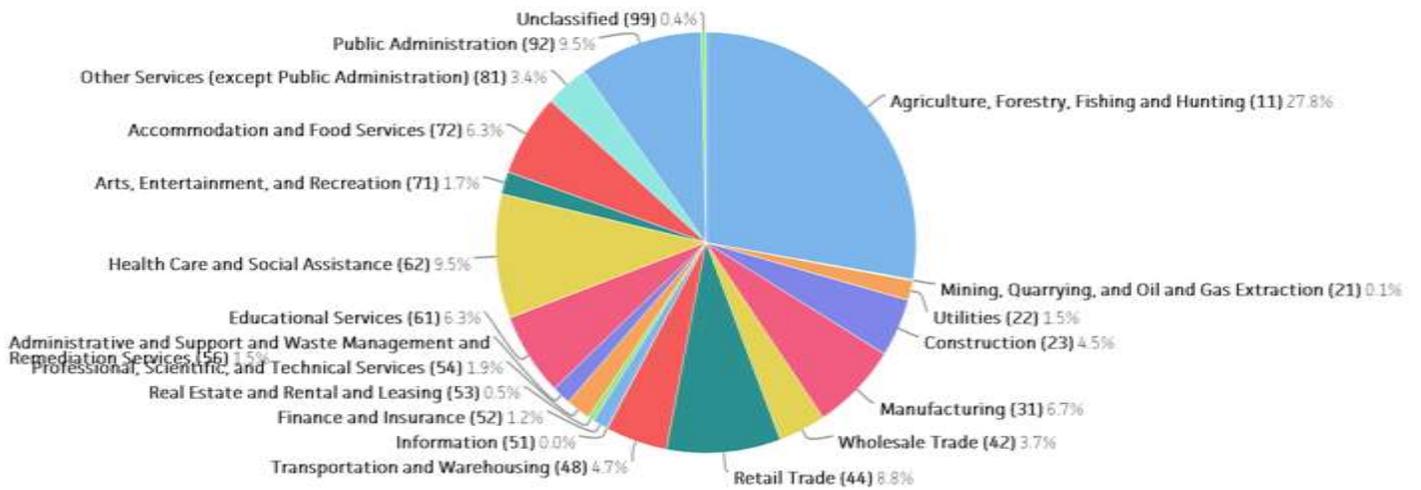
Cost of Living Information			
	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
Glenn County, California	\$38,375	116.1	\$33,044
California	\$61,602	154.6	\$39,857
USA	\$52,595	100.0	\$52,595

Source: JobsEQ.com
 Data as of 2016Q1
 The Cost of Living Index is developed by Chmura Economics & Analytics and is updated quarterly.

Industry Snapshot

The largest sector in Glenn County, California is Agriculture, Forestry, Fishing and Hunting, employing 2,770 workers. The next-largest sectors in the region are Health Care and Social Assistance (951 workers) and Public Administration (946). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Agriculture, Forestry, Fishing and Hunting (LQ = 18.90), Utilities (2.80), and Public Administration (1.98).

Total Workers for Glenn County, California by Industry



Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1.

Sectors in Glenn County, California with the highest average wages per worker are Mining, Quarrying, and Oil and Gas Extraction (\$76,884), Utilities (\$70,796), and Manufacturing (\$56,908). Regional sectors with the best job growth (or most moderate job losses) over the last 5 years are Health Care and Social Assistance (+297 jobs), Agriculture, Forestry, Fishing and Hunting (+257), and Retail Trade (+244). Over the next 10 years, employment in Glenn County, California is projected to expand by 148 jobs. The fastest growing sector in the region is expected to be Health Care and Social Assistance with a +1.7% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+175 jobs), Retail Trade (+73), and Construction (+45).

		Current			Historical				Forecast		
		Four Quarters Ending with 2016q1			Total Change over the Last 5 Years	Average Annual % Change in Employment 2011q1-2016q1			Over the Next 10 Years		
NAICS	Industry	Empl	Avg. Annual Wages	Location Quotient	Empl	Glenn County, California	California	USA	Total Approx Repl Demand	Total Growth Demand	Avg. Annual Growth Percent
11	Agriculture, Forestry, Fishing and Hunting	2,770	\$52,145	18.90	257	2.0%	1.6%	1.0%	950	-132	-0.5%
21	Mining, Quarrying, and Oil and Gas Extraction	9	\$76,884	0.19	-22	-21.5%	0.3%	1.3%	2	1	0.6%
22	Utilities	152	\$70,796	2.80	-22	-2.7%	0.2%	0.1%	39	2	0.1%
23	Construction	444	\$46,483	0.82	7	0.3%	4.5%	2.4%	91	45	1.0%
31	Manufacturing	670	\$56,908	0.80	90	2.9%	0.8%	1.3%	151	-35	-0.5%
42	Wholesale Trade	364	\$47,329	0.92	98	6.5%	2.1%	1.4%	80	4	0.1%
44	Retail Trade	875	\$28,115	0.81	244	6.8%	1.8%	1.5%	281	73	0.8%
48	Transportation and Warehousing	472	\$49,960	1.16	3	0.1%	3.0%	2.2%	122	-6	-0.1%
51	Information	2	\$23,037	0.01	-4	-17.9%	2.4%	0.4%	1	0	0.0%
52	Finance and Insurance	117	\$51,393	0.30	1	0.1%	0.5%	0.9%	28	2	0.2%
53	Real Estate and Rental and Leasing	47	\$44,286	0.28	-29	-9.1%	1.3%	1.4%	10	1	0.2%
54	Professional, Scientific, and Technical Services	190	\$35,168	0.29	20	2.2%	2.9%	2.5%	41	17	0.9%
56	Administrative and Support and Waste Management and Remediation Services	146	\$43,899	0.23	18	2.7%	3.7%	2.9%	33	9	0.6%
61	Educational Services	632	\$36,078	0.76	130	4.7%	1.5%	0.4%	128	-33	-0.5%
62	Health Care and Social Assistance	951	\$28,070	0.68	297	7.8%	6.5%	2.3%	197	175	1.7%
71	Arts, Entertainment, and Recreation	174	\$24,129	0.90	27	3.4%	2.1%	1.9%	54	8	0.4%
72	Accommodation and Food Services	627	\$17,915	0.71	0	0.0%	4.1%	3.0%	221	17	0.3%
81	Other Services (except Public Administration)	336	\$30,302	0.76	-172	-8.0%	-4.8%	-0.1%	85	10	0.3%
92	Public Administration	946	\$45,037	1.98	-204	-3.8%	-0.5%	-0.8%	227	-12	-0.1%
99	Unclassified	36	\$33,297	2.02	26	28.1%	11.4%	12.0%	9	1	0.1%
	Total - All Industries	9,961	\$43,136	1.00	764	1.6%	2.4%	1.6%	2,429	148	0.1%

Source: [IobsEQ@](#)

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1. Forecast employment growth uses national projections adapted for regional growth patterns.

Occupation Snapshot

The largest major occupation group in Glenn County, California is Farming, Fishing, and Forestry Occupations, employing 1,486 workers. The next-largest occupation groups in the region are Management Occupations (1,117 workers) and Office and Administrative Support Occupations (1,098). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Farming, Fishing, and Forestry Occupations (LQ = 23.10), Management Occupations (1.86), and Transportation and Material Moving Occupations (1.27).

Occupation groups in Glenn County, California with the highest average wages per worker are Legal Occupations (\$92,200), Healthcare Practitioners and Technical Occupations (\$89,700), and Architecture and Engineering Occupations (\$82,000). The unemployment rate in the region varied among the major groups from 1.7% among Management Occupations to 18.8% among Farming, Fishing, and Forestry Occupations.

Over the next 10 years, the fastest growing occupation group in Glenn County, California is expected to be Healthcare Practitioners and Technical Occupations with a +1.5% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Personal Care and Service Occupations (+52 jobs) and Sales and Related Occupations (+50). Over the same period, the highest replacement demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Management Occupations (558 jobs) and Farming, Fishing, and Forestry Occupations (515).

SOC	Title	Current					Total Change over the Last 5 Years	Historical			Forecast				
		Four Quarters Ending with 2016q1			2016q1			Empl	Avg Ann % Chg in Empl 2011q1-2016q1			Over the Next 10 Years			
		Empl	Avg. Annual Wages ¹	LQ	Unempl	Unempl Rate			Glenn County, California	California	USA	Current Online Job Ads ²	Total Repl Demand	Total Growth Demand	Avg. Annual Growth Percent
11-0000	Management Occupations	1,117	\$77,100	1.86	19	1.7%	59	1.1%	2.0%	1.4%	7	558	-68	-0.6%	
13-0000	Business and Financial Operations Occupations	253	\$57,100	0.52	17	5.9%	-7	-0.5%	1.9%	1.5%	0	56	9	0.4%	
15-0000	Computer and Mathematical Occupations	61	\$72,500	0.22	5	5.0%	-3	-1.1%	4.1%	2.7%	0	9	3	0.5%	
17-0000	Architecture and Engineering Occupations	72	\$82,000	0.43	6	6.7%	-12	-3.1%	1.4%	1.3%	0	18	0	0.0%	
19-0000	Life, Physical, and Social Science Occupations	64	\$60,700	0.80	4	5.7%	-7	-2.0%	1.6%	1.0%	0	22	2	0.3%	
21-	Community and Social	161	\$39,800	1.02	8	4.7%	5	0.6%	4.4%	1.4%	0	36	16	1.0%	

Occupation Snapshot in Glenn County, California														
SOC	Title	Current					Total Change over the Last 5 Years	Historical			Forecast			
		Four Quarters Ending with 2016q1			2016q1			Avg Ann % Chg in Empl 2011q1-2016q1			Over the Next 10 Years			
		Empl	Avg. Annual Wages ¹	LQ	Unempl	Unempl Rate		Empl	Glenn County, California	California	USA	Current Online Job Ads ²	Total Repl Demand	Total Growth Demand
0000	Service Occupations													
23-0000	Legal Occupations	41	\$92,200	0.52	1	2.5%	-7	-3.0%	0.6%	0.1%	0	8	1	0.2%
25-0000	Education, Training, and Library Occupations	484	\$54,400	0.85	16	3.1%	90	4.2%	1.7%	0.4%	6	105	-15	-0.3%
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	81	\$39,800	0.46	6	5.8%	2	0.6%	1.5%	1.0%	0	29	1	0.1%
29-0000	Healthcare Practitioners and Technical Occupations	294	\$89,700	0.52	10	2.8%	-16	-1.0%	2.2%	1.4%	20	63	48	1.5%
31-0000	Healthcare Support Occupations	182	\$31,100	0.62	19	7.0%	43	5.5%	6.3%	2.2%	1	39	29	1.5%
33-0000	Protective Service Occupations	240	\$59,700	1.25	21	7.5%	-24	-1.9%	1.3%	0.6%	1	68	3	0.1%
35-0000	Food Preparation and Serving Related Occupations	623	\$24,200	0.73	124	12.8%	26	0.9%	4.0%	2.9%	2	249	15	0.2%
37-0000	Building and Grounds Cleaning and Maintenance Occupations	305	\$30,700	0.85	66	14.3%	-90	-5.0%	-1.8%	1.0%	4	71	9	0.3%
39-0000	Personal Care and Service Occupations	490	\$24,100	1.23	49	7.9%	119	5.7%	4.9%	2.2%	0	119	52	1.0%
41-0000	Sales and Related Occupations	738	\$40,000	0.71	75	7.9%	161	5.0%	1.8%	1.4%	5	251	50	0.7%
43-0000	Office and Administrative Support Occupations	1,098	\$35,100	0.73	135	9.7%	54	1.0%	2.2%	1.6%	3	242	-5	0.0%
45-0000	Farming, Fishing, and Forestry Occupations	1,486	\$23,400	23.10	332	18.8%	159	2.3%	1.9%	1.4%	4	515	-73	-0.5%
47-0000	Construction and Extraction Occupations	425	\$48,900	0.96	92	15.4%	1	0.0%	3.8%	2.0%	0	81	34	0.8%
49-0000	Installation, Maintenance, and Repair Occupations	370	\$41,600	0.97	37	7.9%	49	2.9%	2.4%	1.7%	1	96	19	0.5%
51-0000	Production Occupations	526	\$34,300	0.85	74	10.8%	62	2.5%	1.7%	1.7%	1	150	-6	-0.1%
53-0000	Transportation and Material Moving Occupations	848	\$33,400	1.27	123	11.6%	99	2.5%	3.1%	2.2%	4	208	25	0.3%
00-0000	Total - All Occupations	9,961	\$40,800	1.00	n/a	n/a	764	1.6%	2.4%	1.6%	59	2,993	148	0.1%

Source: [JobsEQ®](#)

Data as of 2016Q1 unless noted otherwise

Note: Figures may not sum due to rounding.

1. Occupation wages are as of 2015 and should be taken as the average for all Covered Employment

2. Data represent found online ads active within the last thirty days in any zip code intersecting or within the selected region; data represents a sampling rather than the complete universe of postings; the listing search uses keywords that are similar to but not the equivalent of the SOC occupation definitions.



TEHAMA COUNTY DEMOGRAPHIC PROFILE

Tehama County - Situated in the northern part of the Sacramento Valley, Tehama County has diverse geographical features. The county consists of a broad, alluvial plain, bordered on the east by the Sierra Nevada and on the west by the Pacific Coast Range. The Sacramento River, which divides the county's 2,976 square miles, supports a great range of agricultural activities. Tehama County's population is just over 63,000.

In 2015, the population in Tehama County, California was 63,308. Between 2005 and 2015, the region's population grew at an annual average rate of 0.4%.

The region has a civilian labor force of 26,836 with a participation rate of 54.1%. Of individuals 25 to 64 in Tehama County, California, 14.3% have a bachelor's degree or higher which compares with 30.9% in the nation.

The median household income in Tehama County, California is \$42,369 and the median house value is \$170,300.

Summary ¹						
	Percent			Value		
	Tehama County, California	California	USA	Tehama County, California	California	USA
Demographics						
Population ²	—	—	—	63,308	39,144,818	321,418,820
Population Annual Average Growth ²	0.4%	0.9%	0.8%	271	331,688	2,590,222
Median Age ³	—	—	—	39.5	35.2	37.2
Under 18 Years	25.5%	25.0%	24.0%	16,160	9,295,040	74,181,467
18 to 24 Years	8.4%	10.5%	9.9%	5,316	3,922,951	30,672,088
25 to 34 Years	11.2%	14.3%	13.3%	7,088	5,317,877	41,063,948
35 to 44 Years	11.5%	13.9%	13.3%	7,316	5,182,710	41,070,606
45 to 54 Years	14.6%	14.1%	14.6%	9,254	5,252,371	45,006,716
55 to 64 Years	13.0%	10.8%	11.8%	8,258	4,036,493	36,482,729
65 to 74 Years	9.0%	6.1%	7.0%	5,720	2,275,336	21,713,429
75 Years, and Over	6.9%	5.3%	6.0%	4,351	1,971,178	18,554,555
Race: White	81.5%	57.6%	72.4%	51,721	21,453,934	223,553,265
Race: Black or African American	0.6%	6.2%	12.6%	406	2,299,072	38,929,319
Race: American Indian and Alaska Native	2.6%	1.0%	0.9%	1,644	362,801	2,932,248
Race: Asian	1.0%	13.0%	4.8%	656	4,861,007	14,674,252
Race: Native Hawaiian and Other Pacific Islander	0.1%	0.4%	0.2%	76	144,386	540,013
Race: Some Other Race	9.9%	17.0%	6.2%	6,258	6,317,372	19,107,368
Race: Two or More Races	4.3%	4.9%	2.9%	2,702	1,815,384	9,009,073
Hispanic or Latino (of any race)	21.9%	37.6%	16.3%	13,906	14,013,719	50,477,594
Economic						
Labor Force Participation Rate and Size (civilian population 16 years and over) ⁴	54.1%	63.4%	63.5%	26,836	18,975,006	157,940,014
Armed Forces Labor Force ⁴	0.0%	0.4%	0.4%	16	133,870	1,025,497

Summary ¹						
	Percent			Value		
	Tehama County, California	California	USA	Tehama County, California	California	USA
Veterans, Age 18-64 ⁴	7.0%	4.0%	5.8%	2,580	968,466	11,371,344
Median Household Income ^{3,4}	—	—	—	\$42,369	\$61,489	\$53,482
Per Capita Income ^{3,4}	—	—	—	\$21,002	\$29,906	\$28,555
Poverty Level (of all people) ⁴	18.6%	16.4%	15.6%	11,604	6,115,244	47,755,606
Households Receiving Food Stamps ⁴	14.1%	8.7%	13.0%	3,311	1,102,641	15,089,358
Mean Commute Time (minutes) ⁴	—	—	—	23.7	27.6	25.7
Commute via Public Transportation ⁴	1.1%	5.2%	5.1%	240	859,372	7,157,671
Union Membership ⁵	27.4%	16.4%	11.1%	—	—	—
Educational Attainment, Age 25-64						
No High School Diploma ⁴	17.8%	17.7%	12.0%	5,654	3,582,292	19,939,890
High School Graduate ⁴	29.4%	20.3%	26.5%	9,347	4,103,854	44,000,387
Some College, No Degree ⁴	30.9%	22.4%	21.9%	9,827	4,530,225	36,270,359
Associate's Degree ⁴	7.7%	8.0%	8.7%	2,445	1,620,584	14,487,486
Bachelor's Degree ⁴	10.2%	20.4%	19.7%	3,255	4,131,150	32,646,533
Postgraduate Degree ⁴	4.1%	11.3%	11.2%	1,304	2,279,854	18,533,513
Housing						
Total Housing Units ⁴	—	—	—	27,117	13,781,929	132,741,033
Median House Value (of owner-occupied units) ^{3,4}	—	—	—	\$170,300	\$371,400	\$175,700
Homeowner Vacancy ⁴	1.4%	1.6%	2.1%	221	114,943	1,591,421
Rental Vacancy ⁴	4.8%	4.6%	6.9%	382	275,877	3,105,361
Renter-Occupied Housing Units (% of Occupied Units) ⁴	31.6%	45.2%	35.6%	7,422	5,708,355	41,423,632
Occupied Housing Units with No Vehicle Available (% of Occupied Units) ⁴	5.4%	7.8%	9.1%	1,267	984,914	10,594,153
Social						
Enrolled in Grade 12 (% of total population) ⁴	1.4%	1.6%	1.4%	904	627,396	4,443,768
Disconnected Youth ^{4,6}	1.5%	2.7%	3.3%	51	59,427	572,277
Children in Single Parent Families (% of all children) ⁴	33.6%	33.8%	34.7%	4,733	2,969,144	24,388,185
Disabled, Age 18-64 ⁴	18.5%	8.0%	10.2%	6,771	1,916,028	19,703,061
Disabled, Age 18-64, Labor Force Participation Rate and Size ⁴	33.2%	40.5%	41.2%	2,248	776,518	8,119,295
Foreign Born ⁴	8.6%	27.0%	13.1%	5,456	10,290,636	41,056,885
Speak English Less Than Very Well (population 5 yrs and over) ⁴	7.0%	19.1%	8.6%	4,124	6,789,522	25,305,202

Source: [JobsEQ@](#)

1, Census 2010, unless noted otherwise

2, Census 2015, annual average growth rate since 2005

3, Median values for certain aggregate regions (such as MSAs) may be estimated as the weighted averages of the median values from the composing counties.

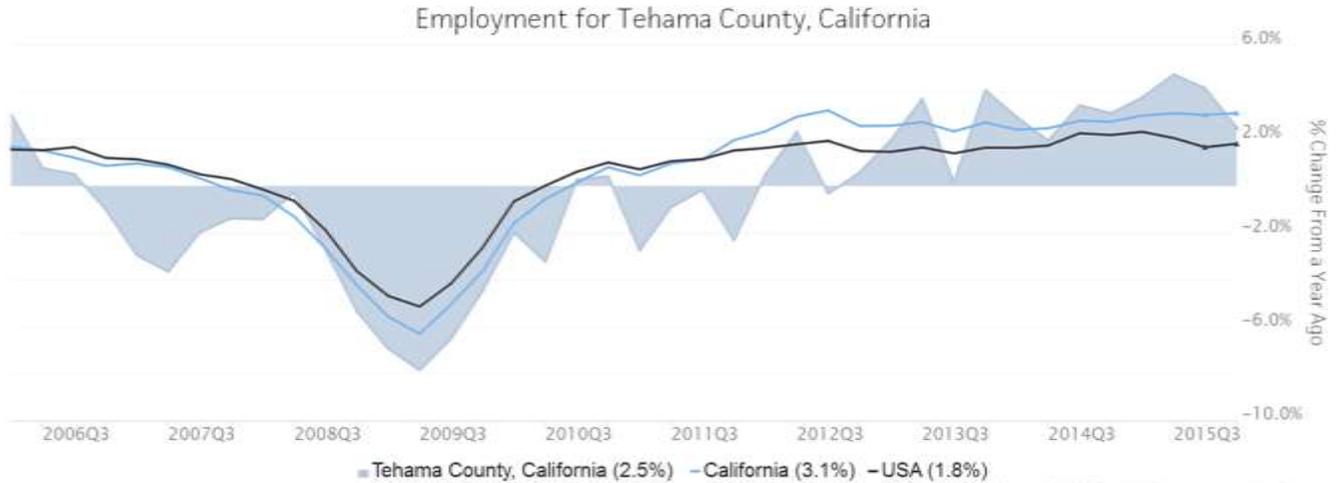
4, ACS 2010-2014

5, 2014; Current Population Survey, unionstats.com, and Chmura; county- and zip-level data are best estimates based upon industry-, MSA-, and state-level data

6, Disconnected Youth are 16-19 year olds who are (1) not in school, (2) not high school graduates, and (3) either unemployed or not in the labor force.

Employment Trends

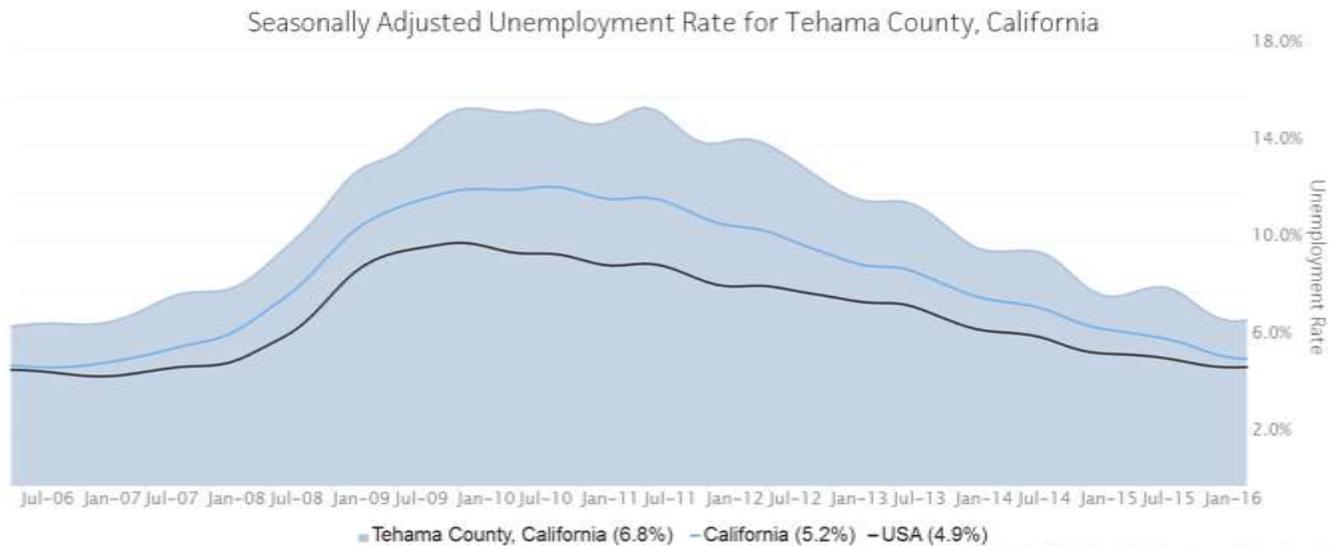
As of 2016Q1, total employment for Tehama County, California was 19,268 (based on a four-quarter moving average). Over the year ending 2016Q1, employment increased 2.5% in the region.



Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1.

Unemployment Rate

The seasonally adjusted unemployment rate for Tehama County, California was 6.8% as of May 2016. The regional unemployment rate was higher than the national rate of 4.9%. One year earlier, in May 2015, the unemployment rate in Tehama County, California was 7.8%.



Unemployment rate data are from the Local Area Unemployment Statistics, provided by the Bureau of Labor Statistics and updated through May 2016.

Wage Trends

The average worker in Tehama County, California earned annual wages of \$38,950 as of 2016Q1. Average annual wages per worker increased 4.2% in the region during the preceding four quarters. For comparison purposes, annual average wages were \$51,614 in the nation as of 2016Q1.



Annual average wages per worker data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1.

Cost of Living Index

The Cost of Living Index estimates the relative price levels for consumer goods and services. When applied to wages and salaries, the result is a measure of relative purchasing power. The cost of living is 9.1% higher in Tehama County, California than the U.S. average.

Cost of Living Information			
	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
Tehama County, California	\$39,391	109.1	\$36,104
California	\$61,602	154.6	\$39,857
USA	\$52,595	100.0	\$52,595

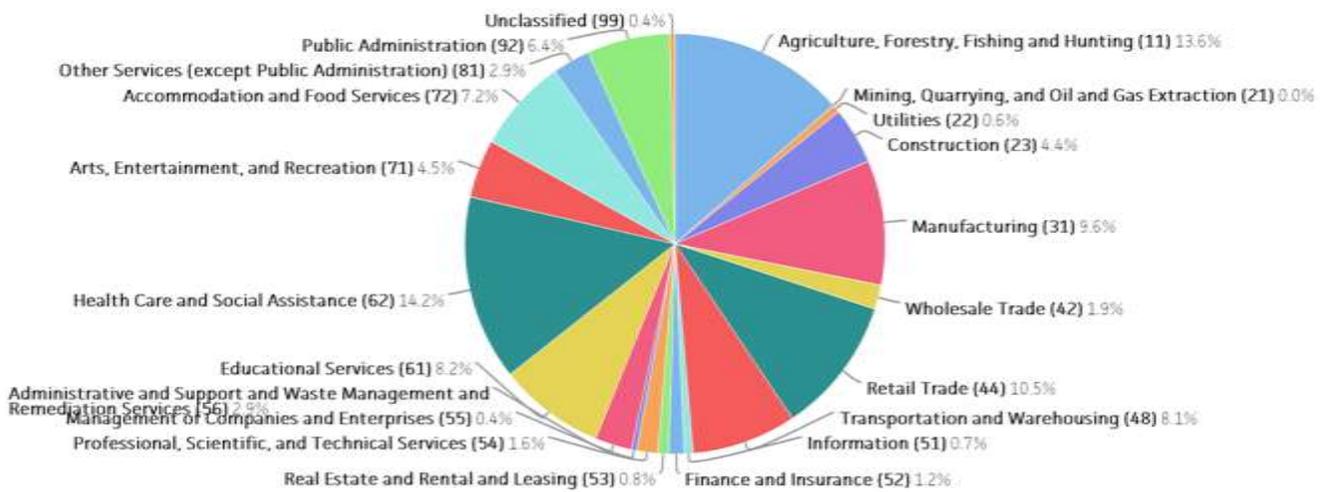
Source: JobsEQ@3core.org
 Data as of 2016Q1
 The Cost of Living Index is developed by Chmura Economics & Analytics and is updated quarterly.



Industry Snapshot

The largest sector in Tehama County, California is Health Care and Social Assistance, employing 2,743 workers. The next-largest sectors in the region are Agriculture, Forestry, Fishing and Hunting (2,615 workers) and Retail Trade (2,031). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Agriculture, Forestry, Fishing and Hunting (LQ = 9.22), Arts, Entertainment, and Recreation (2.30), and Transportation and Warehousing (1.97).

Total Workers for Tehama County, California by Industry



Source: 3coreEQ, Data as of 2019Q1

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1.

Sectors in Tehama County, California with the highest average wages per worker are Utilities (\$111,313), Construction (\$68,707), and Mining, Quarrying, and Oil and Gas Extraction (\$57,456). Regional sectors with the best job growth (or most moderate job losses) over the last 5 years are Health Care and Social Assistance (+690 jobs), Transportation and Warehousing (+384), and Accommodation and Food Services (+301).

Over the next 10 years, employment in Tehama County, California is projected to contract by 150 jobs. The fastest growing sector in the region is expected to be Health Care and Social Assistance with a +1.2% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+356 jobs), Construction (+91), and Professional, Scientific, and Technical Services (+22).

		Current			Total Change over the Last 5 Years	Historical			Forecast		
		Four Quarters Ending with 2016q1				Average Annual % Change in Employment 2011q1-2016q1			Over the Next 10 Years		
NAICS	Industry	Empl	Avg. Annual Wages	Location Quotient	Empl	Tehama County, California	California	USA	Total Approx Repl Demand	Total Growth Demand	Avg. Annual Growth Percent
11	Agriculture, Forestry, Fishing and Hunting	2,615	\$34,567	9.22	300	2.5%	1.6%	1.0%	878	-230	-0.9%
21	Mining, Quarrying, and Oil and Gas Extraction	1	\$57,456	0.01	-5	-34.5%	0.3%	1.3%	0	0	0.6%
22	Utilities	118	\$111,313	1.13	-5	-0.9%	0.2%	0.1%	28	-13	-1.1%
23	Construction	844	\$68,707	0.81	138	3.6%	4.5%	2.4%	173	91	1.0%
31	Manufacturing	1,851	\$46,292	1.15	213	2.5%	0.8%	1.3%	409	-179	-1.0%
42	Wholesale Trade	358	\$34,700	0.46	37	2.2%	2.1%	1.4%	78	-5	-0.1%
44	Retail Trade	2,031	\$31,815	0.97	137	1.4%	1.8%	1.5%	615	-75	-0.4%
48	Transportation and Warehousing	1,552	\$48,573	1.97	384	5.9%	3.0%	2.2%	399	-33	-0.2%
51	Information	131	\$35,209	0.34	-79	-9.1%	2.4%	0.4%	31	-7	-0.5%
52	Finance and Insurance	227	\$51,165	0.30	-19	-1.6%	0.5%	0.9%	53	-6	-0.3%
53	Real Estate and Rental and Leasing	158	\$33,937	0.48	-17	-2.0%	1.3%	1.4%	34	-8	-0.5%
54	Professional, Scientific, and Technical Services	318	\$40,143	0.25	-85	-4.6%	2.9%	2.5%	67	22	0.7%
55	Management of Companies and Enterprises	72	\$41,138	0.25	-239	-25.4%	3.7%	3.5%	15	-1	-0.2%
56	Administrative and Support and Waste Management and Remediation Services	551	\$24,740	0.44	95	3.9%	3.7%	2.9%	123	-3	-0.1%
61	Educational Services	1,576	\$38,972	0.98	96	1.3%	1.5%	0.4%	323	-52	-0.3%
62	Health Care and Social Assistance	2,743	\$34,640	1.01	690	6.0%	6.5%	2.3%	555	356	1.2%
71	Arts, Entertainment, and Recreation	865	\$35,369	2.30	-130	-2.8%	2.1%	1.9%	263	11	0.1%
72	Accommodation and Food Services	1,395	\$17,725	0.82	301	5.0%	4.1%	3.0%	488	12	0.1%
81	Other Services (except Public Administration)	560	\$28,611	0.65	-414	-10.5%	-4.8%	-0.1%	140	4	0.1%
92	Public Administration	1,225	\$51,639	1.33	74	1.2%	-0.5%	-0.8%	291	-36	-0.3%
99	Unclassified	78	\$25,330	2.26	33	11.4%	11.4%	12.0%	19	-1	-0.1%
	Total - All Industries	19,268	\$38,950	1.00	1,503	1.6%	2.4%	1.6%	4,647	-150	-0.1%

Source: [JobsEQ®](#)

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2015Q3 with preliminary estimates updated to 2016Q1. Forecast employment growth uses national projections adapted for regional growth patterns.

Occupation Snapshot

The largest major occupation group in Tehama County, California is Office and Administrative Support Occupations, employing 2,248 workers. The next-largest occupation groups in the region are Transportation and Material Moving Occupations (1,996 workers) and Sales and Related Occupations (1,652). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Farming, Fishing, and Forestry Occupations (LQ = 10.13), Transportation and Material Moving Occupations (1.54), and Personal Care and Service Occupations (1.49).

Occupation groups in Tehama County, California with the highest average wages per worker are Legal Occupations (\$92,500), Healthcare Practitioners and Technical Occupations (\$91,600), and Management Occupations (\$85,000). The unemployment rate in the region varied among the major groups from 1.8% among Management Occupations to 16.1% among Farming, Fishing, and Forestry Occupations.

Over the next 10 years, the fastest growing occupation group in Tehama County, California is expected to be Healthcare Support Occupations with a +1.6% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Healthcare Support Occupations (+93 jobs) and Personal Care and Service Occupations (+92). Over the same period, the highest replacement demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Management Occupations (710 jobs) and Food Preparation and Serving Related Occupations (593).

Occupation Snapshot in Tehama County, California															
SOC	Title	Current					Total Change over the Last 5 Years	Historical			Forecast				
		Four Quarters Ending with 2016q1			2016q1			Empl	Avg Ann % Chg in Empl 2011q1-2016q1			Over the Next 10 Years			
		Empl	Avg. Annual Wages ¹	LQ	Unempl	Unempl Rate			Tehama County, California	California	USA	Current Online Job Ads ²	Total Repl Demand	Total Growth Demand	Avg. Annual Growth Percent
11-0000	Management Occupations	1,594	\$85,000	1.37	32	1.8%	28	0.4%	2.0%	1.4%	10	710	-113	-0.7%	
13-0000	Business and Financial Operations Occupations	480	\$57,400	0.51	30	4.9%	-65	-2.5%	1.9%	1.5%	5	107	5	0.1%	
15-0000	Computer and Mathematical Occupations	162	\$75,000	0.31	10	4.1%	-54	-5.6%	4.1%	2.7%	2	24	6	0.4%	
17-0000	Architecture and Engineering Occupations	114	\$81,700	0.35	9	5.7%	-2	-0.3%	1.4%	1.3%	0	28	-5	-0.5%	
19-0000	Life, Physical, and Social Science Occupations	86	\$63,800	0.56	5	4.4%	-6	-1.4%	1.6%	1.0%	1	29	1	0.1%	
21-0000	Community and Social Service Occupations	305	\$39,700	0.99	14	4.0%	53	3.9%	4.4%	1.4%	1	65	12	0.4%	

Occupation Snapshot in Tehama County, California														
SOC	Title	Current					Total Change over the Last 5 Years	Historical			Forecast			
		Four Quarters Ending with 2016q1			2016q1			Avg Ann % Chg in Empl 2011q1-2016q1			Over the Next 10 Years			
		Empl	Avg. Annual Wages ¹	LQ	Unempl	Unempl Rate		Empl	Tehama County, California	California	USA	Current Online Job Ads ²	Total Repl Demand	Total Growth Demand
23-0000	Legal Occupations	78	\$92,500	0.51	2	2.0%	2	0.6%	0.6%	0.1%	0	15	1	0.1%
25-0000	Education, Training, and Library Occupations	1,193	\$54,200	1.09	33	2.6%	64	1.1%	1.7%	0.4%	9	259	-22	-0.2%
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	166	\$43,400	0.50	10	4.7%	-9	-1.0%	1.5%	1.0%	0	59	-2	-0.1%
29-0000	Healthcare Practitioners and Technical Occupations	824	\$91,600	0.76	23	2.3%	70	1.8%	2.2%	1.4%	20	183	89	1.0%
31-0000	Healthcare Support Occupations	541	\$31,900	0.96	44	5.8%	121	5.2%	6.3%	2.2%	8	118	93	1.6%
33-0000	Protective Service Occupations	430	\$51,800	1.15	34	6.3%	23	1.1%	1.3%	0.6%	2	108	-4	-0.1%
35-0000	Food Preparation and Serving Related Occupations	1,519	\$24,400	0.92	240	10.8%	197	2.8%	4.0%	2.9%	6	593	11	0.1%
37-0000	Building and Grounds Cleaning and Maintenance Occupations	628	\$30,300	0.90	113	12.0%	-121	-3.5%	-1.8%	1.0%	1	143	6	0.1%
39-0000	Personal Care and Service Occupations	1,145	\$25,000	1.49	94	6.5%	102	1.9%	4.9%	2.2%	4	261	92	0.8%
41-0000	Sales and Related Occupations	1,652	\$35,800	0.82	149	6.7%	86	1.1%	1.8%	1.4%	19	552	-51	-0.3%
43-0000	Office and Administrative Support Occupations	2,248	\$34,600	0.78	257	8.2%	145	1.3%	2.2%	1.6%	23	485	-98	-0.4%
45-0000	Farming, Fishing, and Forestry Occupations	1,261	\$24,700	10.13	248	16.1%	202	3.6%	1.9%	1.4%	0	396	-106	-0.9%
47-0000	Construction and Extraction Occupations	765	\$48,800	0.90	146	12.7%	85	2.4%	3.8%	2.0%	0	144	48	0.6%
49-0000	Installation, Maintenance, and Repair Occupations	743	\$42,800	1.01	67	6.8%	46	1.3%	2.4%	1.7%	8	188	15	0.2%
51-0000	Production Occupations	1,337	\$32,800	1.11	160	9.7%	199	3.3%	1.7%	1.7%	0	330	-101	-0.8%
53-0000	Transportation and Material Moving Occupations	1,996	\$34,200	1.54	244	10.0%	338	3.8%	3.1%	2.2%	5	513	-27	-0.1%
00-0000	Total - All Occupations	19,268	\$41,600	1.00	n/a	n/a	1,503	1.6%	2.4%	1.6%	124	5,308	-151	-0.1%

Source: [JobsEQ®](#)

Data as of 2016Q1 unless noted otherwise

Note: Figures may not sum due to rounding.

1. Occupation wages are as of 2015 and should be taken as the average for all Covered Employment

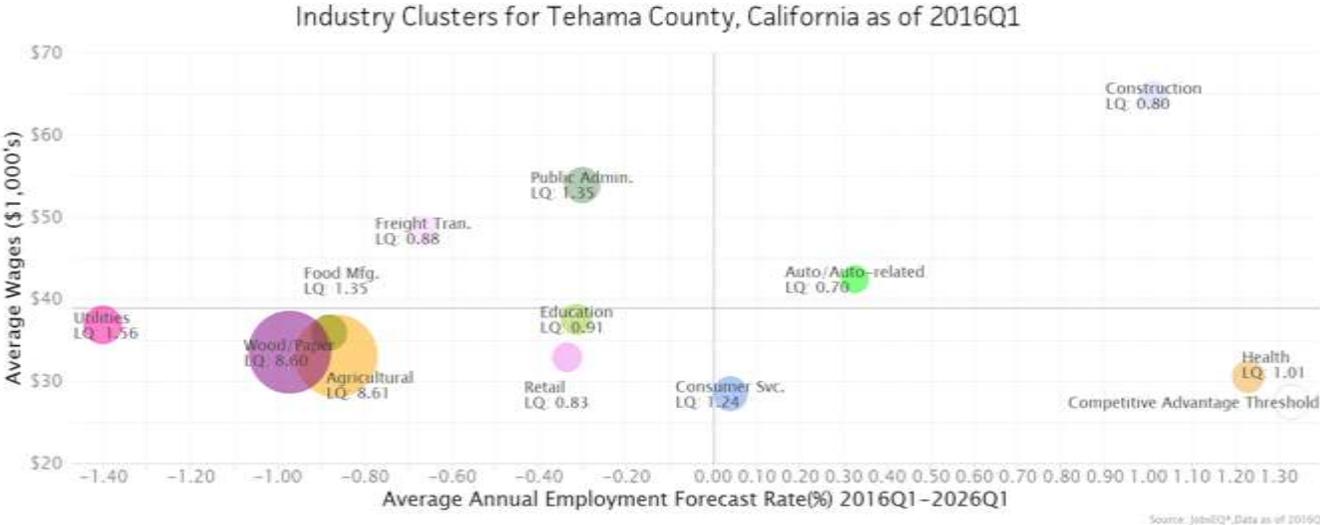
2. Data represent found online ads active within the last thirty days in any zip code intersecting or within the selected region; data represents a sampling rather than the complete universe of postings; the listing search uses keywords that are similar to but not the equivalent of the SOC occupation definitions.

Occupation employment data are estimated via industry employment data and the estimated industry/occupation mix. Industry employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and currently updated through 2015Q3, imputed where necessary with preliminary estimates updated to 2016Q1. Wages by occupation are as of 2015 provided by the BLS and imputed where necessary. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.



Industry Clusters

A cluster is a geographic concentration of interrelated industries or occupations. The industry cluster in Tehama County, California with the highest relative concentration is Agricultural with a location quotient of 8.61. This cluster employs 2,520 workers in the region with an average wage of \$33,076. Employment in the Agricultural cluster is projected to contract in the region about 0.9% per year over the next ten years.



Location quotient and average wage data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics, imputed where necessary, and updated through 2015Q3 with preliminary estimates updated to 2016Q1. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

Education Levels

Expected growth rates for occupations vary by the education and training required. While all employment in Tehama County, California is projected to contract 0.1% over the next ten years, occupations typically requiring a postgraduate degree are expected to grow 0.7% per year, those requiring a bachelor’s degree are forecast to grow 0.1% per year, and occupations typically needing a 2-year degree or certificate are expected to grow 0.4% per year.

Annual Average Projected Job Growth by Training Required for Tehama County, California



Employment by occupation data are estimates as of 2016Q1. Education levels of occupations are based on BLS assignments. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

REGIONAL VISION

The CEDS 5-Year Strategy will address region's SWOT analyses, economic resiliency plans, strategies, training opportunities and areas in need of strengthening to be most competitive. Coordination and communication are primary objectives of the CEDS to facilitate the development of community programs that will be complementary rather than divisive, and enhance awareness of investment strategies in other communities that may be adapted locally. With this in mind, input is regularly solicited from municipal leaders, directors of local economic development corporations, specialty project experts, industry experts, and individuals who are "boots on the ground".

Over the course of the next five years, the District will assist its partners by cultivating and implementing a strategy to include economic resilience preparedness as it relates to economic development. This includes natural disasters or man-made disaster planning and coordination, addressing planning for climate change affects (particularly drought, flooding and fire), major economic disasters (employer closures or relocation, dependence on single industries, etc., or any other proactive disaster planning and coordination work. These include conducting studies, mapping, identifying and/or monitoring work, etc. In conjunction with the resiliency planning, the District will continue to coordinate with all key local, state, federal, private and non-profit organizations to ensure non-duplication of resources and to generate maximum efficiency while leveraging public and private investment. Finally, The District and its partners will facilitate technical assistance efforts and programs to cities, counties and businesses in identification and accessing of financing mechanisms for carrying out high priority economic development projects that will diversify the economy and result in the creation of higher-skilled, higher-paying jobs.

The region has a critical need for funding mechanisms to assist with identifying methods to diversify the regional economy, turning the focus away from declining resource-based industries and government and further towards market-based technology related community investments. The CEDS 5-Year Strategy and its annual update serves to identify and prioritize investment opportunities, which are geared toward contributing to long-term economic diversification leading to the creation of wealth in the region through the creation of higher-skilled, higher wage jobs.

The District will continue to leverage its designation as a Federal and State CDFI to raise capital for the region. Specific work that the District will be assisting with over the next year that will contribute to improving the region's long-term economic growth, providing increased employment opportunities for the unemployed, underemployed, dislocated or low-income workers include:

- Identify gaps in academic and vocational training programs to grow, retain and attract the necessary workforce to support the needs of businesses across all industries.
- Continue to assist the region in creating inventories of available properties, commercial buildings, talent and potential projects.
- Continue working in conjunction local technology group and manufacturing groups to build industry sectors businesses and jobs. It is the District's goal to build a stronger economy through the promotion of a Comprehensive Development Strategy (CEDS) that strives to assist with the start-up and growth of new technology-based businesses in rural areas of the region. These businesses tend to produce higher-skilled,

higher-wage employment opportunities, which stand to have a more significant impact on the economic base of the area.

- Work with the Job Training Centers and the Alliance for Workforce Development focusing on business retention/expansion, and creation efforts toward specific industry clusters identified by each of the communities within Butte, Glenn and Tehama Counties. Examples of the industry clusters that are being targeted through this collaborative effort include, Computer Programming Services, Prepackaged Software, Computer Related Services, Surgical, Dental, and Electro-medical Equipment, agricultural manufacturing and processing and entrepreneurial activities.
- Research investments needed to advance green technology utilization in the region's agriculture, manufacturing and IT industry. New technologies are continuing to emerge. Today's stronger intellectual property rights for innovations have spurred private-sector research. As growing world demand encourages U.S. farmers to expand production, constraints on land, water and energy will compel them to rely on science and technology for increases in production and on entrepreneurial skills to manage the technology. Our regional also recognizes the need for STEM development within our schools and linking innovation and technology with education and workforce development.
- Work on drought, flooding and fire strategies, plans and mitigation efforts.
- Specific Goals and Objectives for the Region are outlined at the end of this Strategy.

RESILIENCY STRATEGY

Overall, the Tri County region has been in self-preservation mode for the last 10 years. As the region's economy begins to recover, it will be critical to conduct SWOT analyses for individual communities and the region as a whole. The SWOT analyses will identify economic development and infrastructure projects that are imperative to the continued growth and sustainability of our economy. The other important component to this process will be to develop goals, strategies, and actions that can mitigate the effects of an economic incident and support long-term recovery efforts. The following items may help in establishing a general framework or identifying specific activities/projects specific to the Region's resiliency:

- Identify persistent economic challenges or deficiencies: What are the region's economic "weak spots" (i.e., vulnerabilities)? Is there a specific asset deficiency (e.g., poorly educated workforce, excessive dependency on a single employer or industry, lack of transportation access/options, low levels of broadband availability and/or adoption, impediments hindering a firm's ability to gain access to the financial resources required to advance its business, major employers located in vulnerable areas)? Has a "planning horizon" been established (e.g., 10 to 15 years) for assessing economic vulnerabilities?
- Prepare for disruptions by identifying "early-warning" tools: Does the region have an "anticipatory focus" that will help it react quickly when confronted with potential disruptions and challenges? Do community economic development professionals work with their local/regional emergency managers to address the risks identified through hazard mitigation planning? Do community leaders employ mechanisms (e.g., scorecards, state of the region reports, economic dashboards) that offer a regularly updated assessment of the regional economy?
- Build mechanisms that create flexibility: Do the local governments have detailed and tested disaster response and recovery plans? Do the local governments and major employers have access to "surge" capital/credit resources? Does the region have a good handle on its assets to help identify emerging economic sectors that may lead to a diversified economic base? Has the region established mechanisms to realign and retrain its workforce post-disruption?
- Promote a positive vision for the region: Is the messaging about the region's assets and opportunities positive (to encourage investments in both times of tranquility and disruption)? Do stakeholders understand that actions that build resilience are good for the regional economy whether or not an economic shock occurs, and have they reached consensus on a set of actions they can take proactively? Are economic shocks used as an opportunity to "re-vision" (i.e., reassess) the region's economy?

SWOT – STRENGTHS

- 11-county workforce jurisdiction with healthy agricultural, health, and advanced manufacturing industry sectors.
- Programs and services our Service Providers offer – seamless connection among our partners
- Affordable Housing is an important component contributing to community health
- Highest economic benefit to community of any sector
- Sustainable practices – internal operations and environmental
- Middle & Upper Middle Class Jobs
- Available land, prime for development; easy access to major interstate highway (I-5); proximity to a major University (CSUC)
- Established industry in area
- Appropriate location for agriculture, including soils, water, etc.
- Farmers can be successful at different sizes/production levels
- Rail access
- Location -I-5 corridor
- Relative low cost of property
- City's service orientation – very willing to facilitate the permitting process required for development
- Small and diversified farms in the last few years have additional opportunities to sell their food at retail prices. Farmers' Markets and CSA (community supported agriculture) provide the small farms with an opportunity to be economically viable.
- While still unable to recoup the cost of growing many crops, at least some crops pay enough money to keep farms going providing there is only a small amount of debt or land is leased cheaply enough. Society is used to cheap food and spending a small part of their disposable income on food
- Additionally, there are wholesale opportunities like grocery stores, food hubs and restaurants that want to capitalize on the renaissance of local food. Unfortunately, the small farms cannot access capital to pay the upfront cost of producing this food.
- CSAs, strong farmer's markets, commercial retailers buying locally
- Well-established University and Community Colleges
- Research and development capacity at University and commercial businesses
- CSU, Chico, Butte College and Shasta College Alumni base
- Strong student base
- Wide program offerings at University and Community Colleges

SWOT – WEAKNESSES

- Assessing future business needs
- Industry–led collaboration
- Too many point of business engagement (education, workforce development, economic development)
- Underfunded, subject to Congressional action, subject to regulatory limitations, is “socialist”
- Lack of skilled workforce
- Must stay up with current technologies
- Little knowledge of Lean principles
- Road, building, air and technology infrastructure
- Limited economic development system capacity
- Water use
- Lack of control over prices
- Up front capital is expensive if you do not meet qualification for USDA special programs (i.e., beginning farmer).
- Dependence on fuel sales tax revenue
- Lack of local employment opportunities
- Lack of industry/shopping
- The value of small and mid-sized farms has been overlooked in a global economy that is based on short term bottom line returns that doesn't consider the negative impacts of industrial Ag.
- Unable to muster the political clout needed to gain access to capital that would truly build local community infrastructure and food security small farms are left to fend for themselves. Fending for yourself has resulted in small farms disappearing from the market place as industrial ag takes over in the global economy.
- In addition, small farmers have gotten old and beat up from endless hours of overworking. The average age of a farmer is almost 60 years old and climbing. The younger generation has thus been forewarned of the drudgery and seeks a more balanced life.
- Unappreciated in society and the market place for the incredible and sophisticated skill set needed to manage the complex systems of growing food many farmers have given up too.
- Lack of capital and is wearing down our small farmers down.
- Some curriculum not relevant or out of date
- University tenured faculty with low motivation
- Lack of integration across University disciplines
- Lack of integration with University and local community

SWOT – THREATS

- Complete understanding of what a recovered economy will look like
- Potential for wasted resources (overlap of planning/analysis/services/business engagement)
- Problems addressing employment/business needs within our rural areas
- Congressional action/in-action; limited resources yielding limited results, jeopardizing perception of viability; cultural attitudes not supportive of low income initiatives.
- Little collaboration with current organizations
- Money to perform all required tasks
- Staff to organize Train the Trainer, Makerspace Trailer, Teacher/Student Tours, Classroom speeches, Training Incumbent Worker, Evaluating School Performance
- Chico/Butte County often chosen “first” over Glenn County and it’s municipalities
- Drought + lack of water may scare off some industries
- Low levels of “higher education” amongst the populace sometimes used by industry to explain why they are adverse to locating there for fear of not finding the workforce they “claim” they need to have available
- Burdensome regulation, not based in science
- Inability to implement new technologies due to public lack of understanding, i.e., genetic engineering
- Climate Change
- Floods and fire hazards
- Inability to control price, markets, commodities, inputs
- Decrease in fuel and auto sales
- Diminishing funding for infrastructure maintenance
- Increase in crime and associated issues
- Public Safety
- Public funding
- Rising costs for higher education and vocational training
- Lower enrollments
- University and Community College Accreditation changes
- Grow of online programs and massive open online courses (MOOCs)

SWOT – OPPORTUNITIES

- WIOA Regional Plan process (asset mapping, labor market/sector analysis)
- New funding opportunities
- Support/encourage training opportunities that are not 2-year or 4-year degrees
- Can mitigate homelessness, stabilizes senior and disabled households, supports upward economic movement of participants
- Ability to compete worldwide by using current technologies
- Education finally realizing the value of local manufacturers
- Training teachers our technologies so they can teach our future workforce
- Willingness to develop industry via politics; current phasing out of row crops into orchards (opportunity for horizontal integration here);
- University to serve as a “feeder” for educated/talented workforce
- Potential to develop new products
- Ever changing, improving technologies
- Flexible family life/schedules
- Direct Marketing
- Agritourism
- Development of I-5 corridor
- Development of downtown in connection with streetscape project
- Promotion of opportunities associated with existing businesses and recreational activities
- Integration across curriculum disciplines
- Integration of University and Community Colleges with local community (accelerators, incubators, etc.)
- Incoming University and Community College faculty
- Private/public research

CEDS 5-YEAR STRATEGY GOALS AND OBJECTIVES

Goal 1: Act Regionally

- **Objective 1.1:** Implement the regional CEDS strategic plan through collaboration and cohesiveness to include Butte, Glenn and Tehama Counties with the ultimate plan of connectivity throughout Northern California.
- **Objective 1.2:** Institutionalize a culture of collaboration across geographic boundaries, sector boundaries and agency boundaries by partnering with NoRTEC and its subsequent local workforce delivery systems. Identify current working sector groups and provide linkages across city, town and county lines.
- **Objective 1.3:** Identify best practices for academic and vocational training workshops, curriculum, events, professionals, and resources to improve workforce across sector lines.
- **Objective 1.4:** Work with NoRTEC to establish a single-source of data and a collective message utilized by decision-makers, leaders and resource developers throughout the region enhancing competitiveness and creating a unifying brand.
- **Objective 1.5:** Invite the private sector to be more engaged with the public sector to support the development and growth of educational, vocational and workforce trainings to strengthen the region's talent and businesses.

Goal 2: Talent Development, Retention and Education

- **Objective 2.1:** Align education and workforce development programs (academic and vocational) to develop and retain talented workers with the skills to meet current and future employer needs in Northern California.
- **Objective 2.2:** Develop an integrated pre-k through post-secondary system including career education system and training on creating, running, managing small businesses as well as introductory curriculum on the various industries in the North State and the necessary skillsets needed to be successful.
- **Objective 2.3:** Lead the North State in science, technology, engineering, arts and math (STEAM) in connecting or creating educational facilities, curriculum and internship opportunities (both academic and vocational).

Goal 3: Infrastructure Growth

- **Objective 3.1:** Enhance transportation infrastructure to promote commercial activity across all industries: roads, railway, air service, and refrigerated distribution.
- **Objective 3.2:** Create cold storage alternatives for the agricultural sector to increase shelf life of products and limit the need for refrigerated distribution.

- **Objective 3.3:** Expand and maintain diverse, reliable and cost effective energy sources and systems by incorporating technological advances and exploring alternative sources for generating energy.
- **Objective 3.4:** Continue the development and implementation of regional water conservation and alternative water supply projects to ensure supply and healthy water quality for the North State.
- **Objective 3.5:** Explore the options for management of wastewater treatment districts, sewer connectivity and septage containment.

Goal 4: Business Climate & Competitiveness

- **Objective 4.1:** Ensure regional and local agencies provide collaborative, seamless, consistent and timely customer service to business
- **Objective 4.2:** Implement best practices for business retention and expansion efforts
- **Objective 4.3:** Expand opportunities for access to capital and mentoring to businesses throughout their life cycle.
- **Objective 4.4:** Identify technology, work culture and quality of life aspects desired by the millennial generation to retain and attract to the region.
- **Objective 4.5:** Identify steps to retain recent high school graduates not attending collecting, including training, internships and matching programs to connect students with employers.

Goal 5: Support Entrepreneurial Environment & Culture to Enhance Existing and Growing New Businesses

- **Objective 5.1:** Implement an innovation ecosystem which provides tools and services to enhance the capacity for innovation within existing and new businesses. Model the entrepreneurial ecosystem after Chico Start Technology Incubator.
- **Objective 5.2:** Engage with existing entrepreneurs to determine the critical services and tools that enhance the likelihood of success for themselves and new entrepreneurs. Encourage their involvement with mentoring new entrepreneurs to utilize their expertise. Model best practices that are currently implemented with 3CORE's Business Vitality Seed Fund.
- **Objective 5.3:** Harness efforts currently facilitated by NoRTEC's data collection efforts in this sector. Assess regional innovation and entrepreneurial climate and its available resources.

Goal 6: Community Safety & Health

- **Objective 6.1:** Identify and present to decision makers best practices for public safety.
- **Objective 6.2:** Identify existing or facilitate the design of new plans for the following safety measures: fire, water, building construction, hazard mitigation plans, traffic and pedestrian safety, disease and business continuity.
- **Objective 6.3:** Inventory Public and Private Sector emergency preparedness and response

Goal 7: Decision Making Elements

- **Objective 7.1:** Understand, acknowledge and (where appropriate) implement cultural and institutional knowledge and history of region into decision making processes and systems.
- **Objective 7.2:** Create and utilize a collective regional message including economical, societal and environmental attributes and challenges to create a unifying message.
- **Objective 7.3:** Agree on and use one source of current, relevant data and communicate to region how to access and contribute to the sources in partnership with NoRTEC.

Goal 8: Economic Resiliency

- **Objective 8.1:** Conduct inventory analysis of current mitigation and response plans to economic and environmental disasters.
- **Objective 8.2:** Utilize regional SWOT analysis to identify areas of confluence as well as divergence. From this, the District can assess the ability of how each of our communities and the region can recover economically should a disaster occur. Update as necessary.
- **Objective 8.3:** Network with local agencies and organizations to determine current plans in effect and how economic resilience integrates with disaster planning.
- **See also Goal 6: Community Safety & Health**

ACTION PLAN

3CORE, as the District, and the Strategy Committee will begin work immediately to identify resources, current efforts and talent to move the 8 goals forward for the Region. Beginning August 2016, the Committee will convene monthly. Their first task will be to create subcommittees based on areas of interest and expertise to create maximum efficiency and to accomplish the greatest amount of work within the group. The current meeting schedule has been set and will run from August 2016 through June 2017.

The Strategy Committee is also tasked with identifying key players within the sectors or areas of interest that may not be at the table during the work sessions. It is important to hear perspectives and experience from those that have “boots on the ground” outside of the Committee as work progresses.

As the District and the Committee make progress on the 8 goals, they will mark accomplishments and will suggest modifications to the original plan as stated in the CEDS 5-Year Strategy. The District will update the CEDS 5-Year Strategy annually through 2021 based on feedback and action of the Committee and its subsequent partners.