



Board Agenda Item 17

DATE: August 5, 2025

TO: Board of Supervisors

SUBMITTED BY: Steven E. White, Director
Department of Public Works and Planning

SUBJECT: Fresno County 2025-2030 Comprehensive Economic Development Strategy (CEDS)

RECOMMENDED ACTION(S):

- 1. Approve and adopt the Fresno County 2025-2030 Comprehensive Economic Development Strategy (CEDS).**
- 2. Authorize the submittal of the Fresno County 2025-2030 CEDS to the United States Department of Commerce, Economic Development Administration (EDA) for approval.**
- 3. Authorize the Director of the Department of Public Works and Planning or their designee, subject to review and approval as to legal form by County Counsel, to make minor changes to the document to ensure approval by EDA.**

General Plan Policy ED-A.4 directs the County to maintain, monitor, and periodically update the County's Comprehensive Economic Development Strategy (CEDS), which is used to assist in the implementation of the County's economic development goals, policies, and programs of the General Plan, as well as fulfilling the United States Department of Commerce, Economic Development Administration (EDA) CEDS requirements for Federal grant funding eligibility.

Since July 2024, a project team led by the Department of Public Works and Planning (Department) and the Fresno County Economic Development Corporation (EDC), alongside third-party consultant TIP Strategies, Inc. (TIP), has engaged in updating Fresno County's 2025-2030 CEDS. The updated CEDS is a policy and planning document that will guide the County's economic development and enable the EDA, to fund projects consistent with the County's current economic development goals, policies, and programs. This item is countywide.

ALTERNATIVE ACTION(S):

Your Board may amend the CEDS prior to submission to the EDA. If your Board does not approve this item, and the CEDS is not updated, the County would be ineligible for Federal EDA funding.

FISCAL IMPACT:

There is no Net County Cost associated with the recommended actions. On September 7, 2021, the County allocated \$100,000, and on September 6, 2022, \$50,000 to EDC to initiate preparation of the CEDS update, including creation of a digitally integrated CEDS. On March 28, 2023, your Board authorized the Department to submit a grant application to the EDA for grant funds available under the Planning and Local Technical

Assistance Program, using County funds previously provided to EDC as the required grant match. The County was notified that it was successful in receiving \$150,000 in grant funding on June 27, 2023. On June 4, 2024, your Board approved and authorized the County to execute a Revenue Agreement with EDC to pay for the update of the CEDS and executed an agreement with TIP to develop the CEDS. The total funds allocated to the project are \$300,000, comprising \$150,000 from EDA Grant Funds and \$150,000 from County funds previously provided to the EDC.

DISCUSSION:

The Board last adopted the CEDS on May 2, 2017. The County, in partnership with EDC, applied to the EDA for a grant to conduct robust stakeholder engagement and produce a digitally integrated CEDS available in multiple languages. The County and EDC selected TIP to assist with this CEDS to create an integrated digital strategy for Fresno County and its 14 cities (excluding the City of Fresno who is preparing their own CEDS).

This updated CEDS replaces Fresno County's 2016-2021 CEDS, which has been operating under an extension from the EDA and provides a framework for addressing regional economic development priorities and opportunities and enables efficient resource allocation toward shared goals. The CEDS is intended to enhance the region's economic capacity and resilience, improve coordination, and determine eligibility for Federal funding opportunities. Furthermore, the CEDS provides local jurisdictions (including cities and the County), institutions of higher education, and public or private non-profit organizations or associations with the opportunity to apply for State, Local, and Federal grants available for public works, economic development projects, and most planning programs under EDA.

Additionally, EDA uses the CEDS to determine whether a project is consistent with local economic development goals and programs prior to considering a project for funding assistance. By approving the updated CEDS, the County can ensure that EDA funding assistance is allocated where it will have the greatest economic impact, especially as it relates to projects that lead to job creation.

The CEDS is a living document that should be updated regularly as economic conditions in Fresno County evolve. Designed to be carried forward by multiple organizations and partnerships, full implementation of the CEDS will rely on collaboration across a broad network, including economic development groups, local governments, workforce agencies, and industry stakeholders. The online version of the CEDS will be digitally integrated with key databases, allowing the document to be updated when new data is available.

Approval of the recommended action to update the CEDS is consistent with General Plan Policy ED-A.4 which requires the County to maintain, monitor and update an Economic Development Strategy, as well as fulfilling EDA requirement. The CEDS will be used to assist with implementing the economic development goals, policies, and programs of the General Plan.

Currently, the TIP team is professionally formatting the document. These changes will be nonsubstantive in nature, with no changes to objectives, goals, or data of the document. Changes will only include graphic design elements and formatting, including, but not limited to, infographics, regional photography, and section dividers.

Project Framework

The CEDS was prepared over the course of an 11-month engagement facilitated by Austin-based TIP using the firm's three-phase planning model: discovery, opportunity, and implementation. Guidance was provided throughout the planning process by the 40-member CEDS Strategy Committee, comprised of representatives from diverse public and private sector interests. The resulting strategic framework guided the preparation of the Strategic Action Plan, which includes a vision statement, guiding principles, and recommended objectives.

VISION STATEMENT. The vision statement serves as the foundation of the CEDS, providing a unifying direction for Fresno County's economic future. It establishes a shared aspiration that guides decision-making and aligns regional priorities and resources toward common goals. Developed through collaboration with community leaders and stakeholders, this vision reflects the collective priorities of Fresno County.

"Fresno County is a place where opportunity is accessible to all, prosperity is shared, and a diversified economy supports resilient, thriving communities."

GUIDING PRINCIPLES. The CEDS Strategy Committee established five guiding principles that build on the CEDS vision and reflect the values held by regional stakeholders. These concepts are integrated throughout the strategies and action items.

- **Balance Growth.** Fresno County promotes access to jobs and growth, ensuring that opportunities and benefits are accessible to all residents.
- **Sustainability.** Fresno County is committed to building an economy that is resilient and responsive to community needs, balancing economic, environmental, and social considerations for long-term prosperity.
- **Innovation.** Fresno County drives job creation and business growth through a data-informed approach, fostering a dynamic and competitive regional economy.
- **Accountability.** Fresno County fosters transparency, attainability, and integrity, encouraging trust and measurable progress within the community.
- **Authenticity.** Fresno County honors its agricultural legacy, diverse culture, and rich history, preserving its identity for future generations.

OBJECTIVES. The vision and guiding principles informed the selection of four objectives that would have the greatest impact on Fresno County's competitive position and align with the stated priorities. Each of these objectives is supported by a series of strategies and actions that comprise the Strategic Action Plan.

1. **Business Growth.** Foster a competitive business environment that supports the expansion of existing industries, attracts new investment, and drives innovation to create a resilient and diversified economy.
2. **Workforce Development.** Build a skilled and adaptable workforce to drive Fresno County's economic growth and competitiveness.
3. **Infrastructure & Real Estate.** Develop and enhance the real estate and infrastructure assets needed to support business growth and strengthen the regional economy.
4. **Quality of Place.** Elevate the region's quality of place by creating vibrant, sustainable communities that attract talent and visitors and support local businesses.

In addition to the Strategic Action Plan, the CEDS incorporates an extensive amount of information about Fresno County's socioeconomic trends. Some highlights are listed below.

Development Trends

- **Population Growth:** Fresno County's population has grown steadily, adding nearly 345,000 residents since 1990 (a 50% increase). However, this growth pace has slowed, especially after the 2020 US Census. Natural change (births minus deaths) is a significant component of this growth, while international migration has decreased. Domestic out-migration has seen spikes, reflecting broader California trends.
- **Ethnic Diversity:** Over half of the residents are Hispanic or Latino. More than a quarter are non-Hispanic White, with the remainder being a mix of Asian, Black or African descent, Multiracial, and others.
- **Language:** Nearly half of the residents speak a language other than English at home, with Spanish being the primary one. In some municipalities, over 80% of residents speak Spanish at home.
- **Age Structure:** The County has a relatively young population, with three out of ten residents under the age of 20, and most residents under 35.
- **Educational Attainment:** Less than a quarter of residents over 25 have a bachelor's degree or higher, which is lower than the national average. About one in five Fresno County residents have an education below the high school level, double the US rate. This varies significantly within the county, with some cities having a majority of residents without a high school diploma.

Economic Trends

- **Income Levels:** Median household income in Fresno County is significantly below both California and national figures. Clovis is the only city in the county with a median household income above the national median.
- **Poverty Rates:** The poverty rate is higher than both state and national averages, with nearly one in five residents living below the poverty line.
- **Housing Affordability:** While median home values are lower than the statewide average, housing remains unaffordable for many due to low household incomes. Over a quarter of homeowners are housing-cost burdened (spending 30% or more of income on housing). Similarly, 54.4% of renters are housing-cost burdened, a figure identical to the statewide rate.
- **Employment & Unemployment:** The labor force participation rate is comparable to California's, but the unemployment rate (8.6%) is higher than the state's (6.4%). Unemployment is notably higher in some lower-income cities within the county.
- **Commuting:** Most working residents (71.2%) also live within Fresno County. There's a slight net out-commute, with many working in the nearby cities of Visalia or Madera.

Key Industries

The CEDS identifies target and emerging industry clusters.

- **Established Strengths / Target Industries:**
 - **Agriculture & Food Processing:** Fresno County is a top national agricultural producer with a robust food processing and distribution supply chain, including livestock processing.
 - **Heavy Manufacturing:** Identified as an existing strength.

- **Transportation & Logistics:** Supported by strategic location and infrastructure, this sector is growing.
- **Renewable Energy:** Fresno County is a major contributor to California's renewable energy sector, particularly solar farms.
- **Healthcare:** The largest local sector by employment.
- **Evolving Opportunities / Emerging Industries:**
 - **Agriculture Technology (AgTech):** An emerging cross-sector field leveraging the strong agricultural economy and innovation.
 - **Advanced Manufacturing:** Identified as an opportunity for diversification.
 - **Water Innovation:** Highlighted due to the region's water challenges and innovation assets like Fresno State's WET Center.
- **Other Important Sectors Mentioned:**
 - **Distribution & Electronic Commerce:** A growing traded sector.
 - **Education:** Fresno State University, Fresno Pacific University, and local community colleges are key institutions for workforce development and innovation.
 - **Tourism/Agritourism:** Leveraging national parks (Sequoia, Kings Canyon, Yosemite proximity) and agricultural heritage (Blossom Trail, farm-to-table).

OTHER REVIEWING AGENCIES:

The CEDS Steering Committee, the Fresno County EDC, the Fresno Area Workforce Development Board, Fresno Economic Opportunities Commission, and city management and staff from 15 cities have all been involved in the update of the CEDS.

In addition, the project team asked for input from various County departments, as well as community groups and organizations, including the Fresno County Farm Bureau, the San Joaquin Valley Manufacturing Alliance, the Fresno Chamber of Commerce, various other rural chambers of commerce, and the Fresno Coalition for Digital Inclusion; key employers, such as OK Produce, Community Health System, Wawona Frozen Foods, and the Fresno Chaffee Zoo; and higher education institutions including Fresno State, State Center Community College District, and Fresno Pacific University.

REFERENCE MATERIAL:

BAI #39, June 04, 2024
BAI #52, March 28, 2023
BAI #61, October 10, 2023
BAI #25 September 06, 2022
BAI #32, September 07, 2021
BAI #10 May 2, 2017

ATTACHMENTS INCLUDED AND/OR ON FILE:

Fresno County Comprehensive Economic Development Strategy (2025-2030)
Comprehensive Economic Development Strategy Presentation

CAO ANALYST:

Maria Valencia