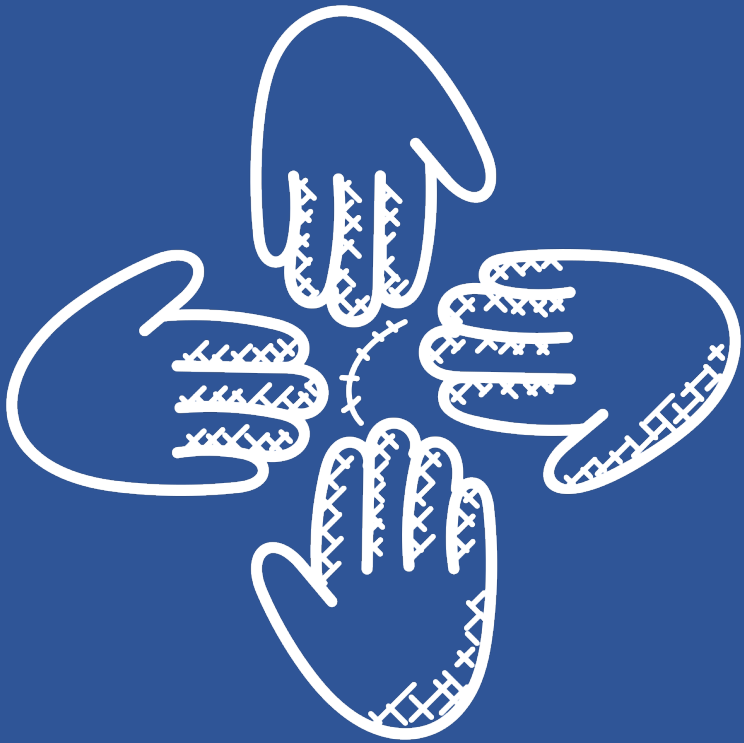


Welcome and Opening

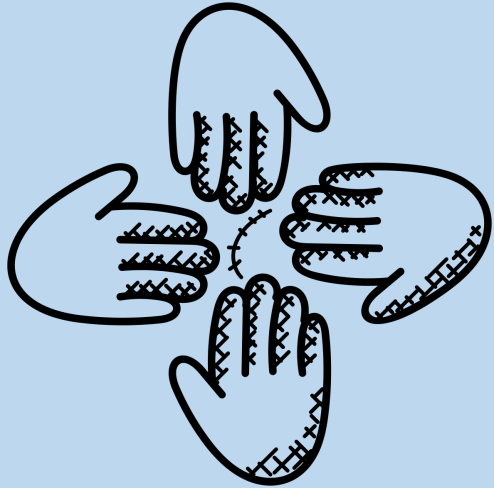


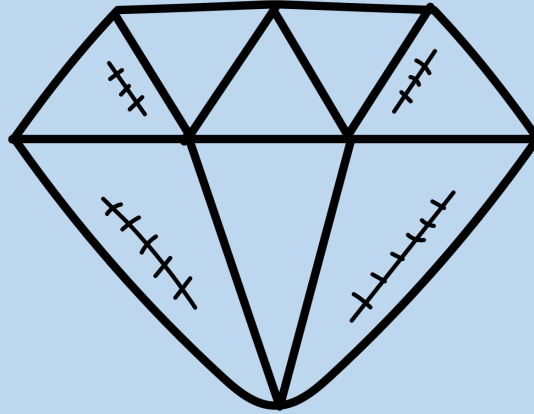
- **Intentions for our time together**
- **Opening Remarks:**
Jody Hayes, Stanislaus County CEO
- **Poem by Miniya Joy**

Welcome

Jody Hayes

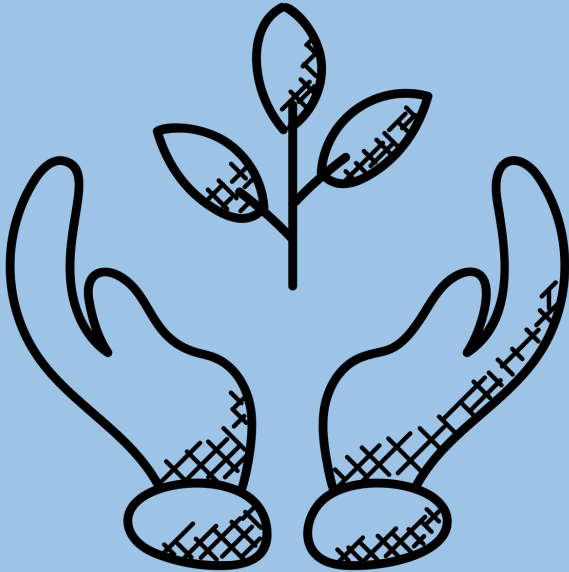
**Stanislaus County
CEO**



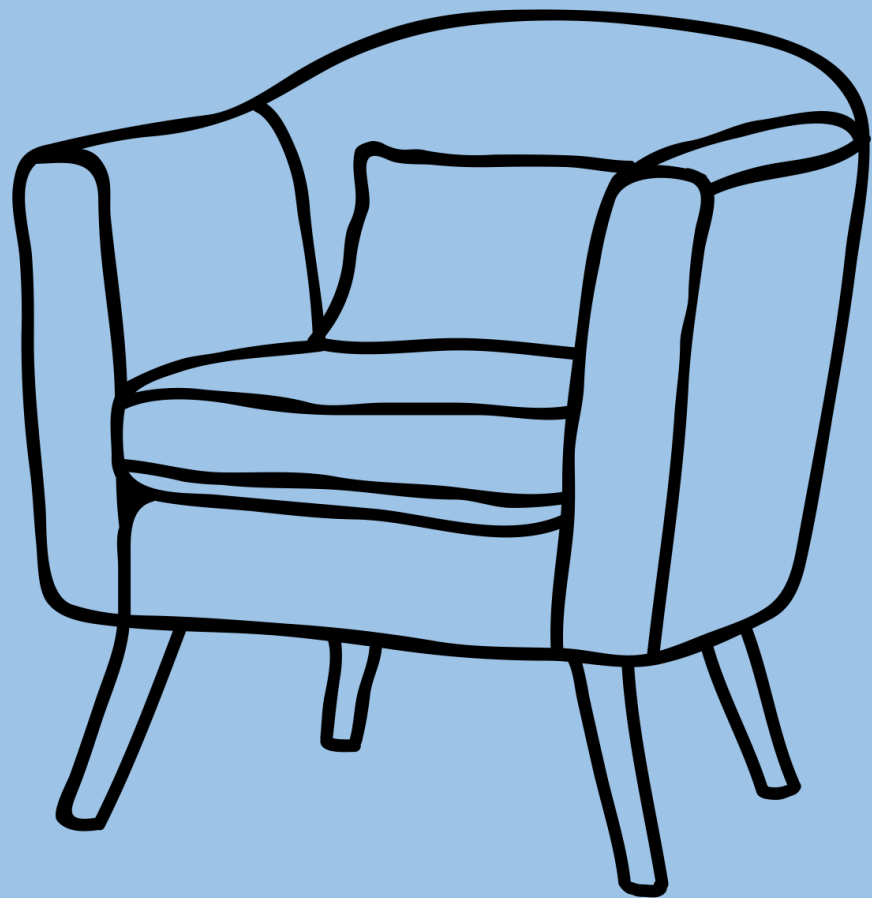


Welcome
Miniya Joy

Requests



- **Be mindful of making space; we have different levels of privilege and authority in the room**
- **Choose to be present**
- **Stay open and curious**
- **Call people in, not out**
- **Take care of yourselves**



**Who do you
Bring
into the room
With You?**

What will we be doing together today?



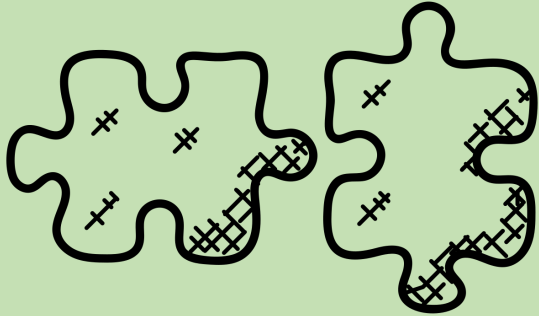
- Connect with one another
- Hear about planning
- Learn about our region
- Understand the opportunity
- Lean into the process

Erick Serrato

Convener, Northern San Joaquin Valley CERF

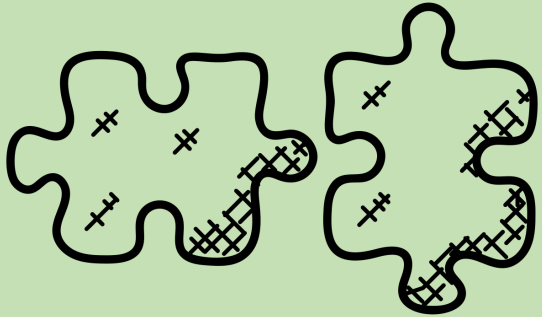
Director, Merced County Workforce Development Board

What is CERF?

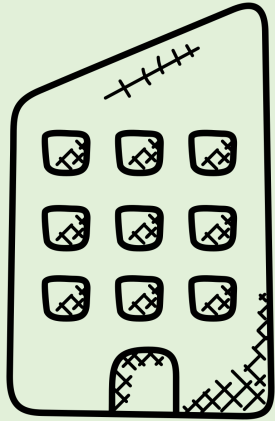


- \$600M Investment
- 13 Regions across the State
- Focus on inclusive economic development
- Equity-focused, community-engaged
- Capacity-development for community
- Funding for strategic projects and programs
- (won't be "CERF" much longer...)

What can CERF be for us?



- Leverage for something much bigger, beyond initial investment
- Actualization of our priorities and values
- Roadmap for future investment and economic relationship building
- Establishing ourselves as an economic region
- Developing a shared vision



Defining what ‘shared prosperity’ looks like for us

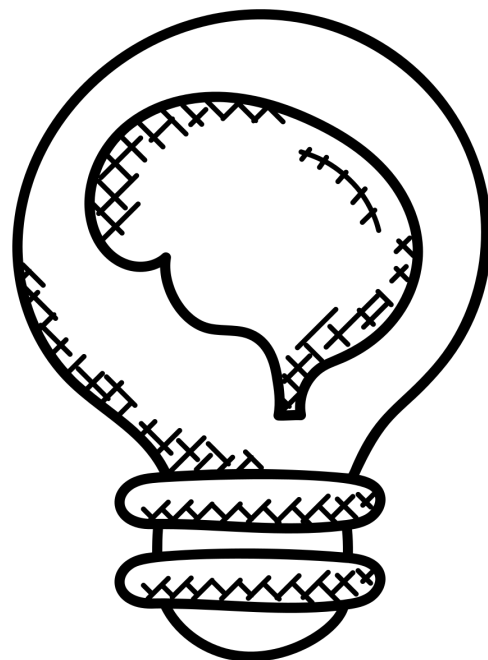


Building our
Institutions, Networks, Systems



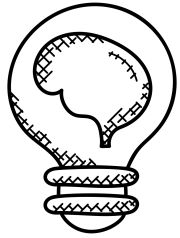
the High-Road Inclusive + Vibrant Economy

“North Valley THRIVE”



Planning Phase

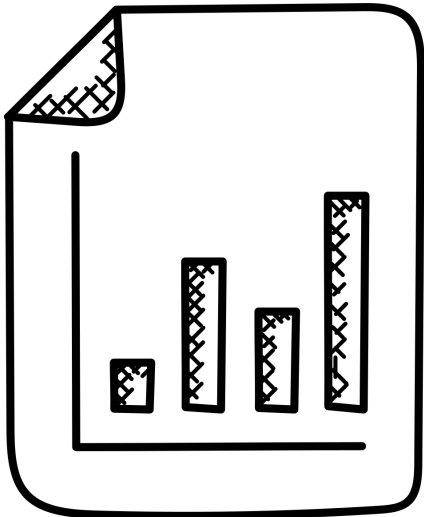
March 2023 – September 2024



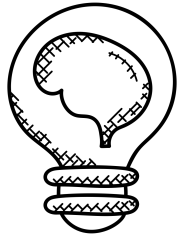
Planning Phase

Part 1: Baseline Research and Stakeholder Mapping

March thru August



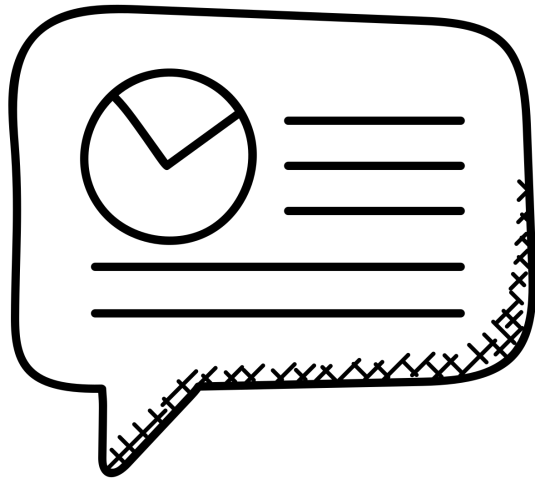
- Baseline Research
- Health Equity, Climate, Workforce
- Stakeholder Mapping
- Seating our Leadership Committee (HRTC)



Planning Phase

Part 2: Strategy Development and Investment Proposal

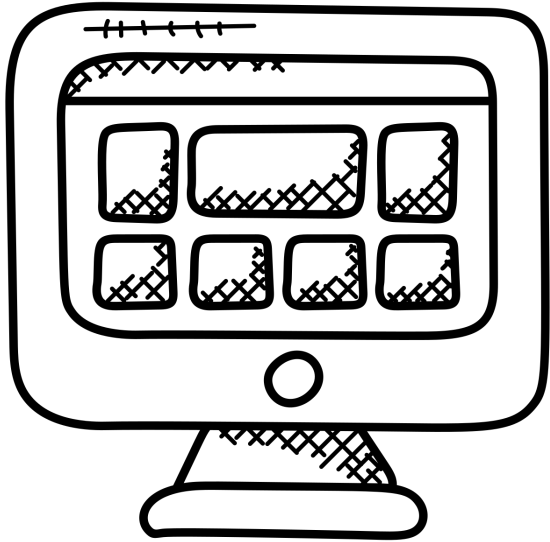
September thru June



- Deeper focus on Strategy Areas of Climate, Workforce, Economy, Health
- Release of ‘Strategy Reports’ in each areas, collaboratively developed with organizations interested in that area

Governance

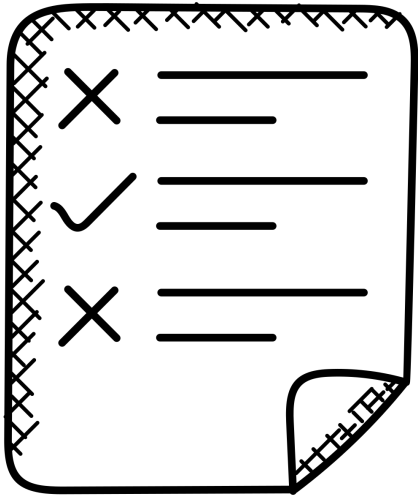
HRTC Academy



- Learning about Inclusive Economic Development
- Understanding how economies work
- Decision-making and power-sharing

Strategy Area

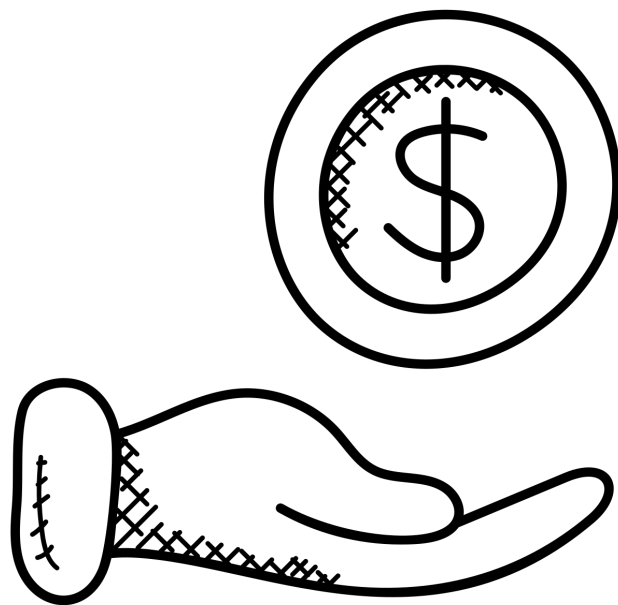
Values & Commitments



- Identifying what is important and necessary for us through the lens of these strategy areas
- Requirements and commitments for investment

List of Projects

- Identification of possible investments in sector development, infrastructure, programs, and other strategies
- Approval of final list that meet the values and requirements set by our engaged partners



Implementation Phase

October 2023 – December 2024



Implementation Phase

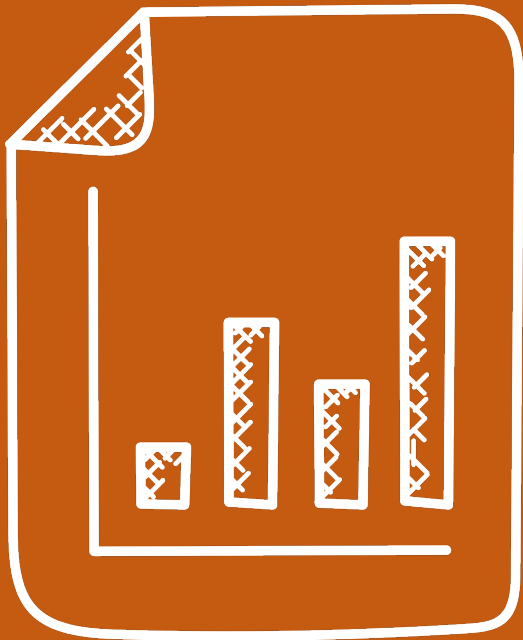
Project Implementation and Investment Strategy

October thru September

- One year (!) to fully expend on projects and strategies
- Launch of new ‘institution’ to support and sustain ongoing work
- Leveraging for further investment to the region

An Overview of the NSJV

April 24, 2023



Thomas Pogue, Executive Director
Center for Business and Policy Research
Eberhardt School of Business
University of the Pacific

<https://www.pacificcbpr.org/>

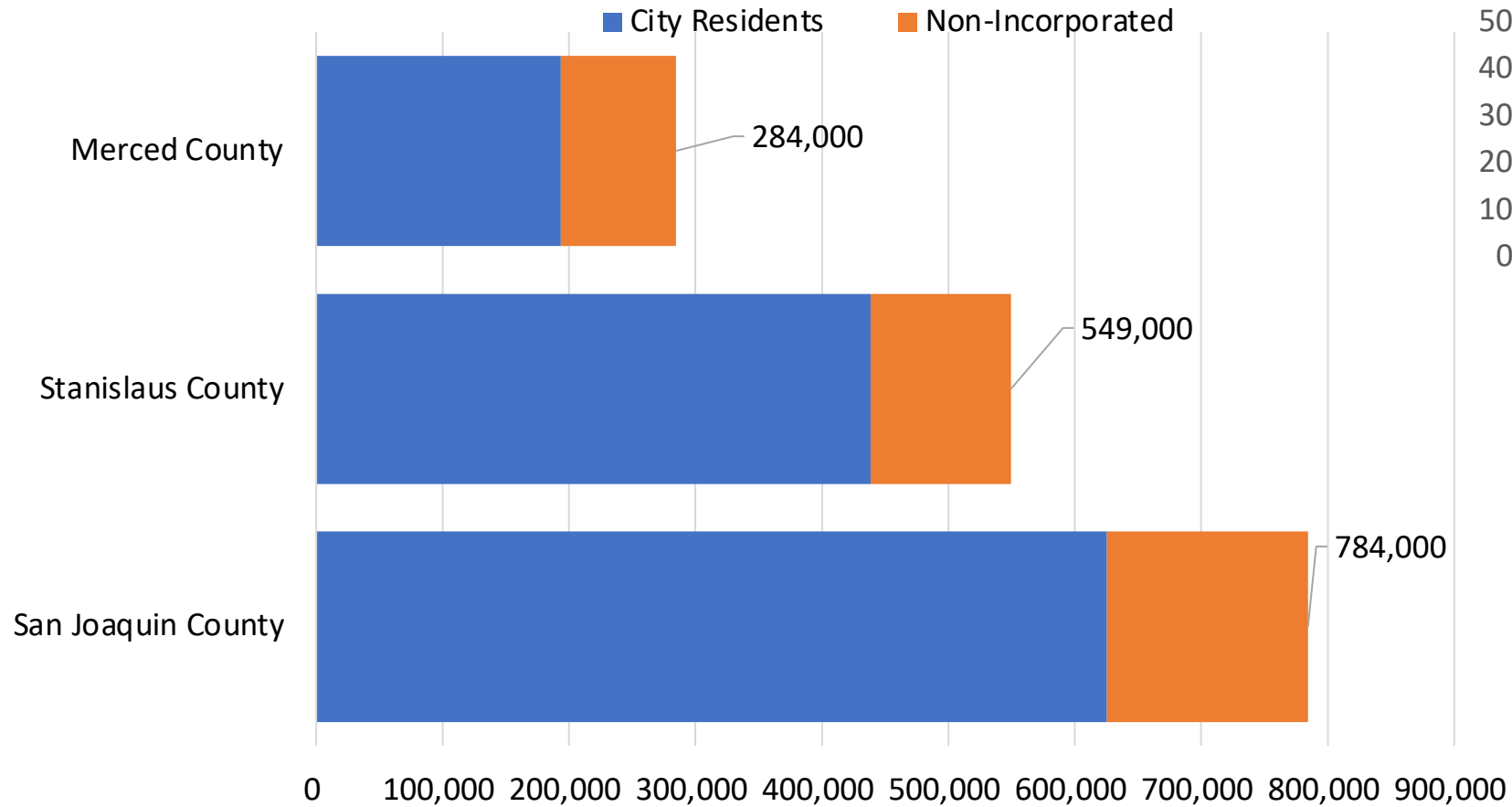
Outline

- **People and Society**
- **Environment**
- **Economy**
- **Socio-culture**
- **Call for contributions!**

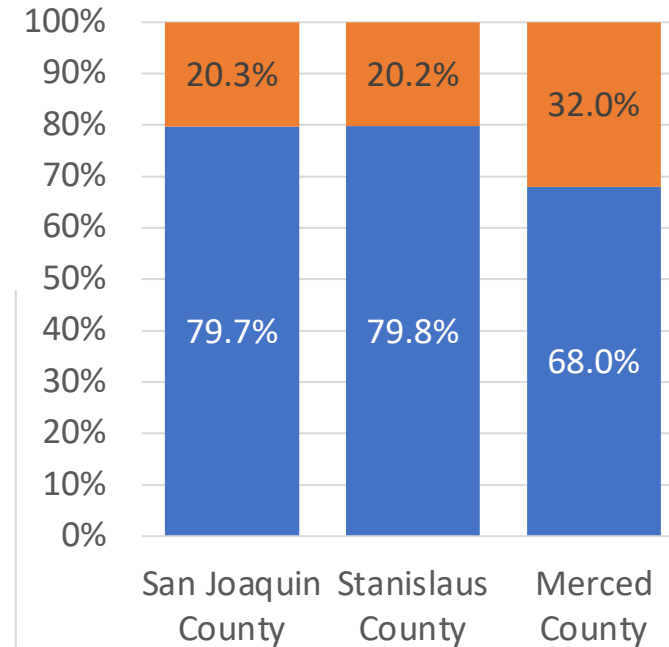
People and Society

NSJV Population

Total population in 2022 => 1.6 million
San Joaquin 48%, Stanislaus 34%, Merced 18%



City and Non-Incorporated Residents



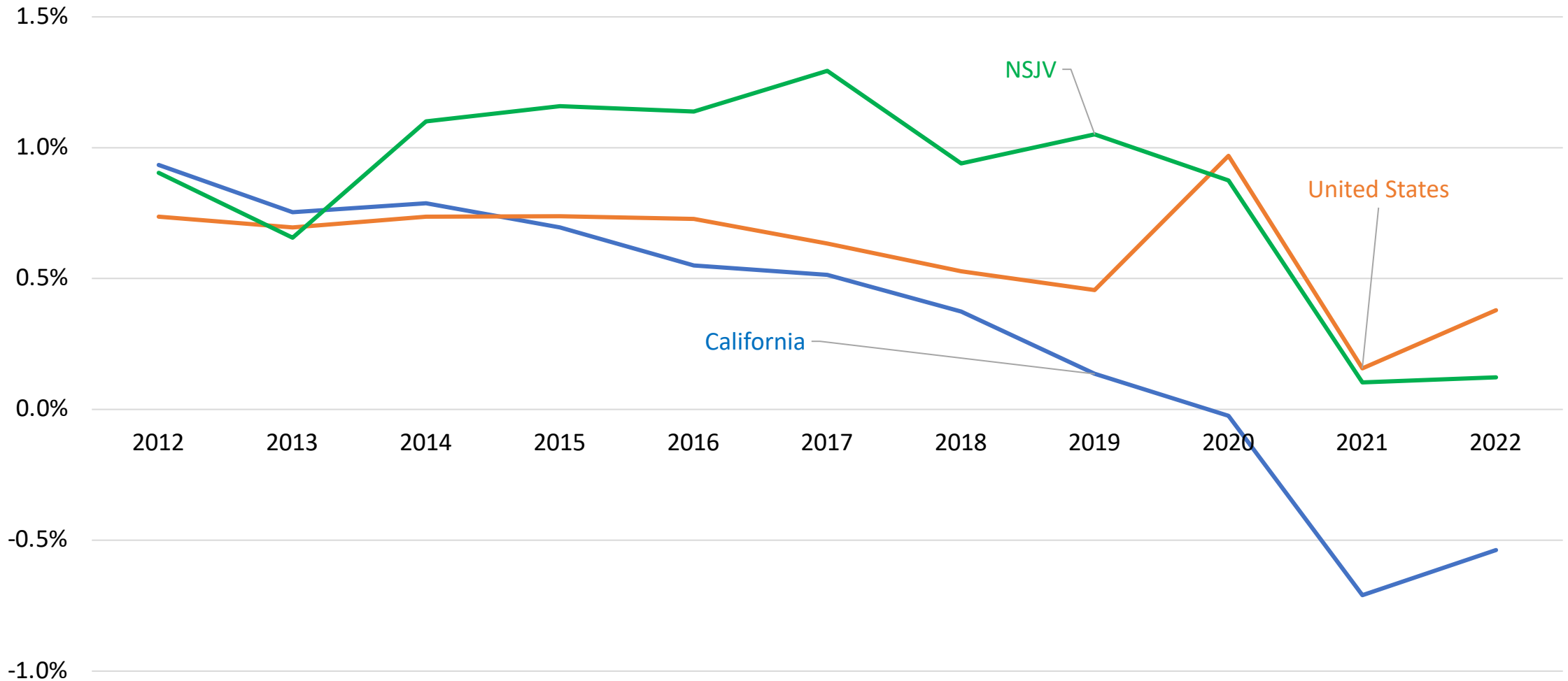
NSJV Population Growth Rates

Comparative Growth Rates		
	2011-2020 %	2021-2022 %
<u>San Joaquin County</u>	<u>12.1%</u>	<u>0.2%</u>
<u>Stanislaus County</u>	<u>6.6%</u>	<u>-0.6%</u>
<u>Merced County</u>	<u>8.2%</u>	<u>1.4%</u>
<u>NSJV</u>	<u>9.5%</u>	<u>0.1%</u>
<u>California</u>	<u>4.8%</u>	<u>-0.5%</u>

Cities have grown at a rate several times that of unincorporated areas

NSJV Population Growth Slowing

While growth well above California, since the pandemic regional growth has slowed



NSJV Cities Populations & Growth Rates

Rank	City	County	Population	2011-2020 %	2021-2022 %
11	Stockton	San Joaquin	322,490	8.5%	-0.4%
19	Modesto	Stanislaus	217,880	7.9%	-0.4%
78	Tracy	San Joaquin	94,540	14.7%	1.0%
90	Merced	Merced	89,060	10.7%	1.0%
93	Manteca	San Joaquin	86,860	23.7%	2.2%
123	Turlock	Stanislaus	71,530	8.6%	-0.3%
135	Lodi	San Joaquin	66,570	8.7%	0.6%
186	Ceres	Stanislaus	48,390	7.0%	-0.8%
191	Los Banos	Merced	46,640	13.9%	1.0%
235	Atwater	Merced	31,650	11.1%	-1.1%
238	Lathrop	San Joaquin	31,330	43.5%	6.6%

Rank	City	County	Population	2011-2020 %	2021-2022 %
277	Riverbank	Stanislaus	24,580	10.0%	-0.6%
279	Patterson	Stanislaus	24,370	12.5%	2.2%
281	Oakdale	Stanislaus	23,070	10.8%	-0.2%
324	Ripon	San Joaquin	15,980	9.7%	-1.1%
330	Livingston	Merced	14,410	13.3%	0.5%
354	Newman	Stanislaus	12,240	13.8%	-0.7%
383	Waterford	Stanislaus	8,870	4.8%	-0.8%
396	Hughson	Stanislaus	7,500	8.3%	0.0%
403	Escalon	San Joaquin	7,360	4.0%	-1.0%
416	Gustine	Merced	5,980	4.7%	-1.9%
418	Dos Palos	Merced	5,720	11.3%	-2.1%

Note: Rankings as of 1/1/2022 out of 482 cities state-wide

Migration Patterns

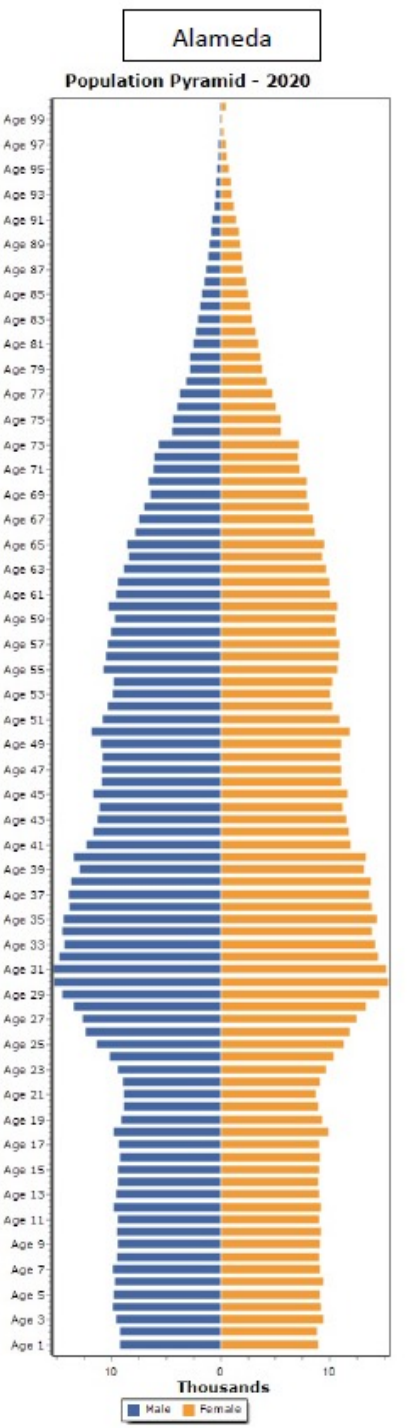
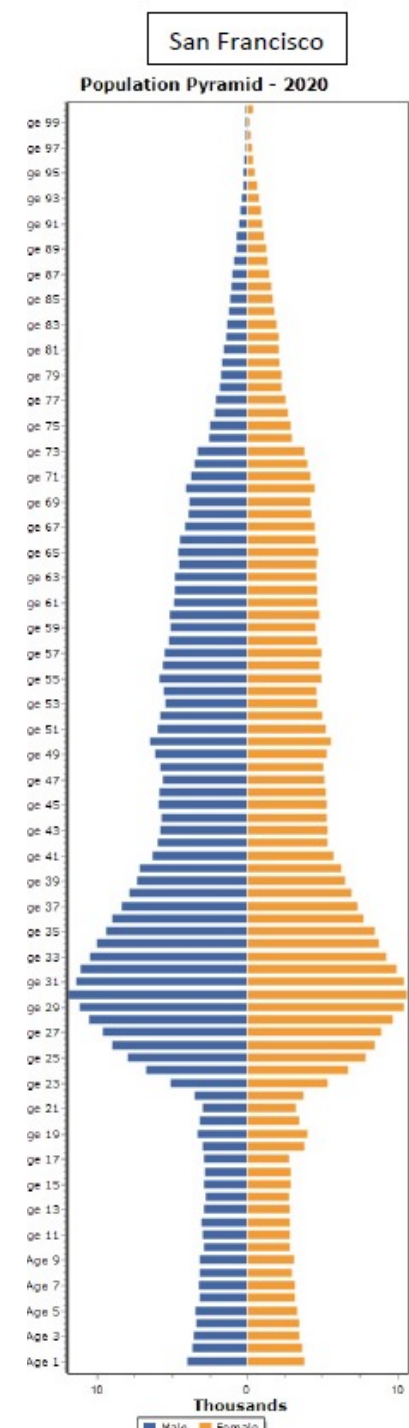
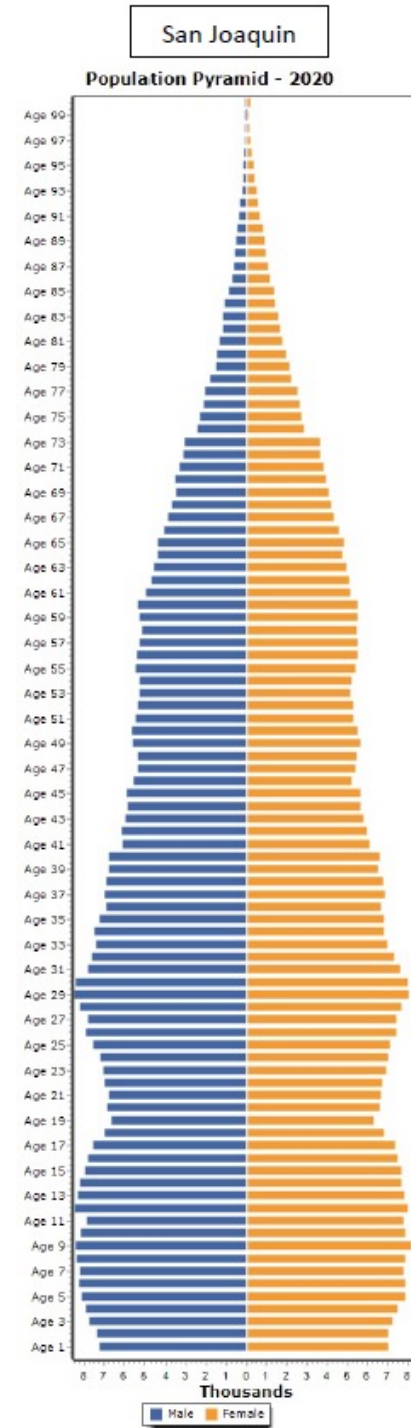
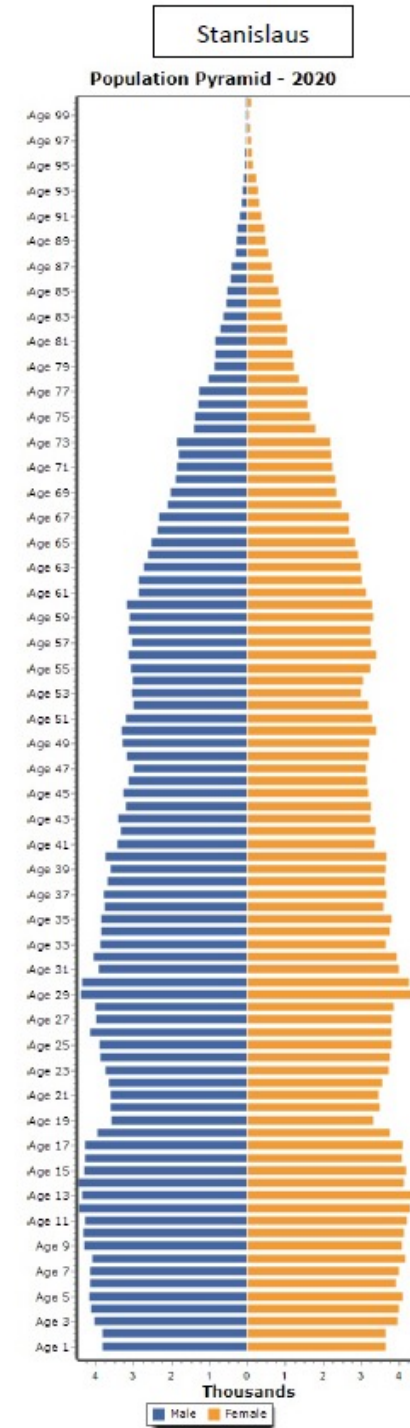
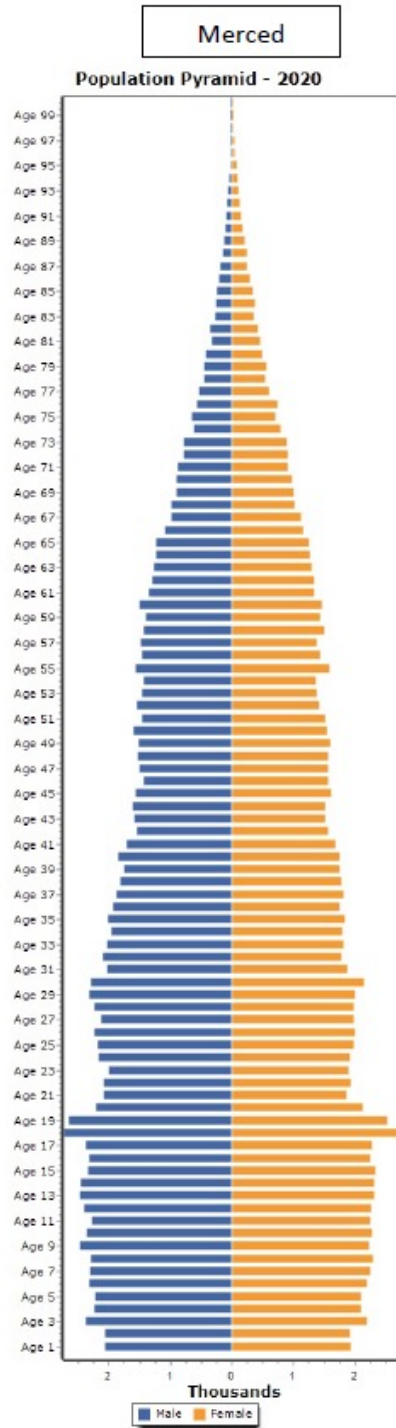
2020 Net Migration Outflows from MSA row to MSA column (negative values are inflows)	Stockton, CA	Modesto, CA	Merced, CA	San Francisco-Oakland-Berkeley, CA	San Jose-Sunnyvale-Santa Clara, CA	Sacramento-Roseville-Folsom, CA	Other CA	AZ	NV	TX	WA	Net California
Stockton, CA		-262	-65	4,777	2,195	-395	-352	-169	-420	-288	-187	5,898
Modesto, CA			-702	1,081	854	-243	-228	-192	-228	-249	-65	1,024
Merced, CA				351	688	-9	85	-50	-48	-96	-19	1,882
San Francisco-Oakland-Berkeley, CA					3,149	-9,536	-28,642	-2,557	-3,880	-5,946	-4,821	-41,238
San Jose-Sunnyvale-Santa Clara, CA						-3,400	-6,167	-1,009	-1,415	-2,560	-1,929	-16,453
Sacramento-Roseville-Folsom, CA							2,017	-923	-1,561	-1,587	-677	15,600

NSJV Demographics

	NSJV	California	USA
Population (Millions)	1.6	39.4	326.6
Median Age (years)	33.8	36.7	38.2
Male	49.9%	49.7%	49.2%
Female	50.1%	50.3%	50.8%
Under 18 Years	27.5%	22.8%	22.4%
18 to 24 Years	9.9%	9.5%	9.3%
25 to 34 Years	14.3%	15.3%	13.9%
35 to 44 Years	12.8%	13.3%	12.7%
45 to 54 Years	11.9%	12.8%	12.7%
55 to 64 Years	11.0%	12.0%	12.9%
65 to 74 Years	7.4%	8.3%	9.4%
75 Years and Over	5.2%	6.0%	6.7%
Race: White	58.0%	56.1%	70.4%
Race: Black or African American	5.0%	5.7%	12.6%
Race: American Indian and Alaska Native	0.8%	0.8%	0.8%
Race: Asian	11.0%	14.8%	5.6%
Race: Native Hawaiian and Other Pacific Islander	0.5%	0.4%	0.2%
Race: Some Other Race	13.9%	14.3%	5.1%
Race: Two or More Races	10.9%	7.9%	5.2%
Hispanic or Latino (of any race)	46.7%	39.1%	18.2%

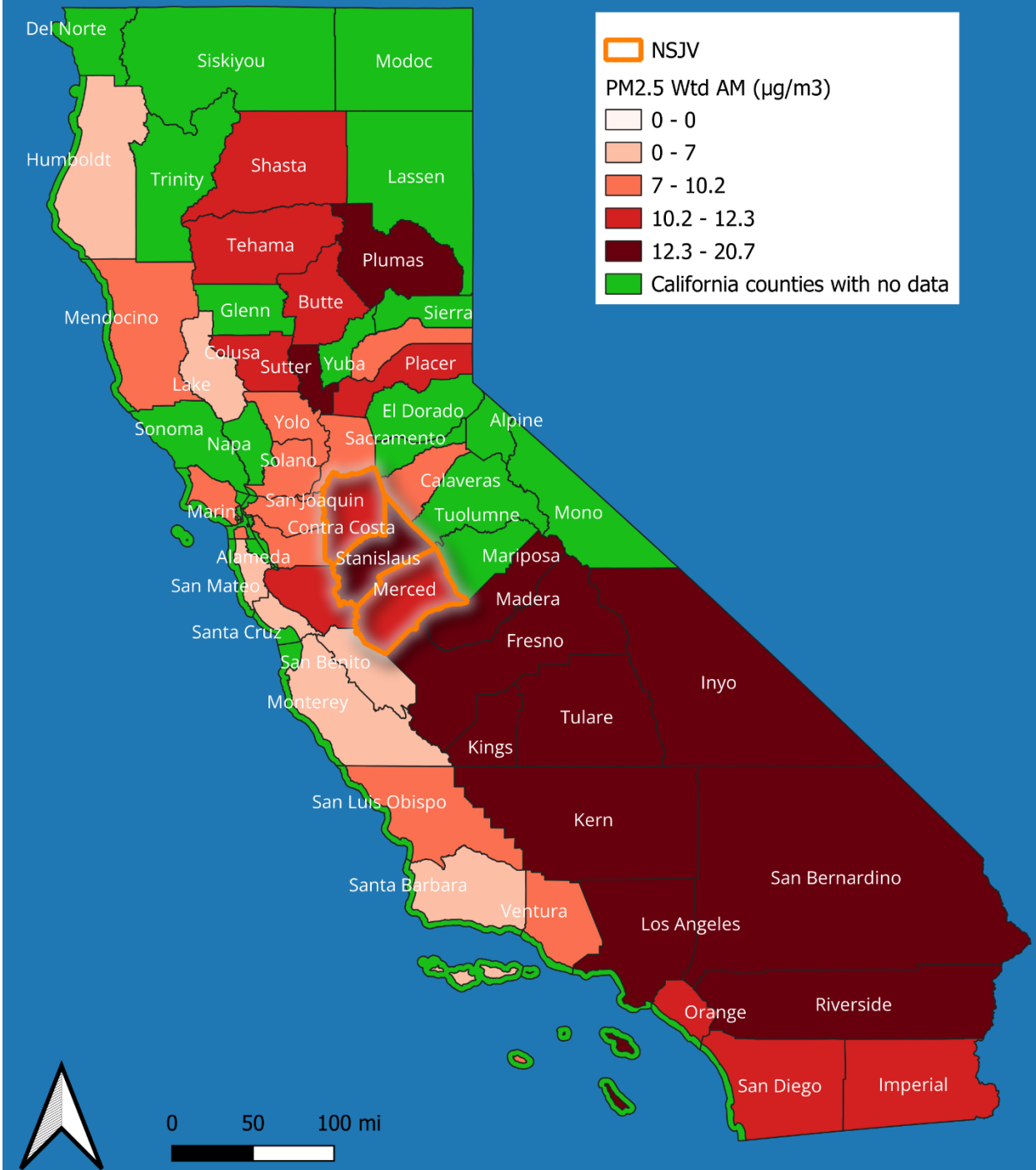
Source: JobsEq based on American Community Survey 2016-2020

Population Pyramids



Environment

2021 Air Quality Annual Particulate Matter (PM-2.5)



NAAQS is 12 µg/m³

Source: EPA Air-Trends data

Communities Affected by Pollution and Vulnerable to its Effects

- CalEnviroScreen
 - Uses environmental, health, and socioeconomic information to produce scores for every census tract in the state.
 - Scores each community so that different communities can be compared.
 - An area with a high score is one that experiences a much higher pollution burden than areas with low scores.

CalEnviroScreen 4.0 Indicators

- **Pollution Burden:**

 - Exposure Indicators**

 - For example: Ozone, PM2.5, Drinking Water Contaminants, Pesticide Use.

 - Environmental Indicators**

 - For example: Cleanup Sites, Groundwater Threats, Impaired Water Bodies.

- **Population Characteristics:**

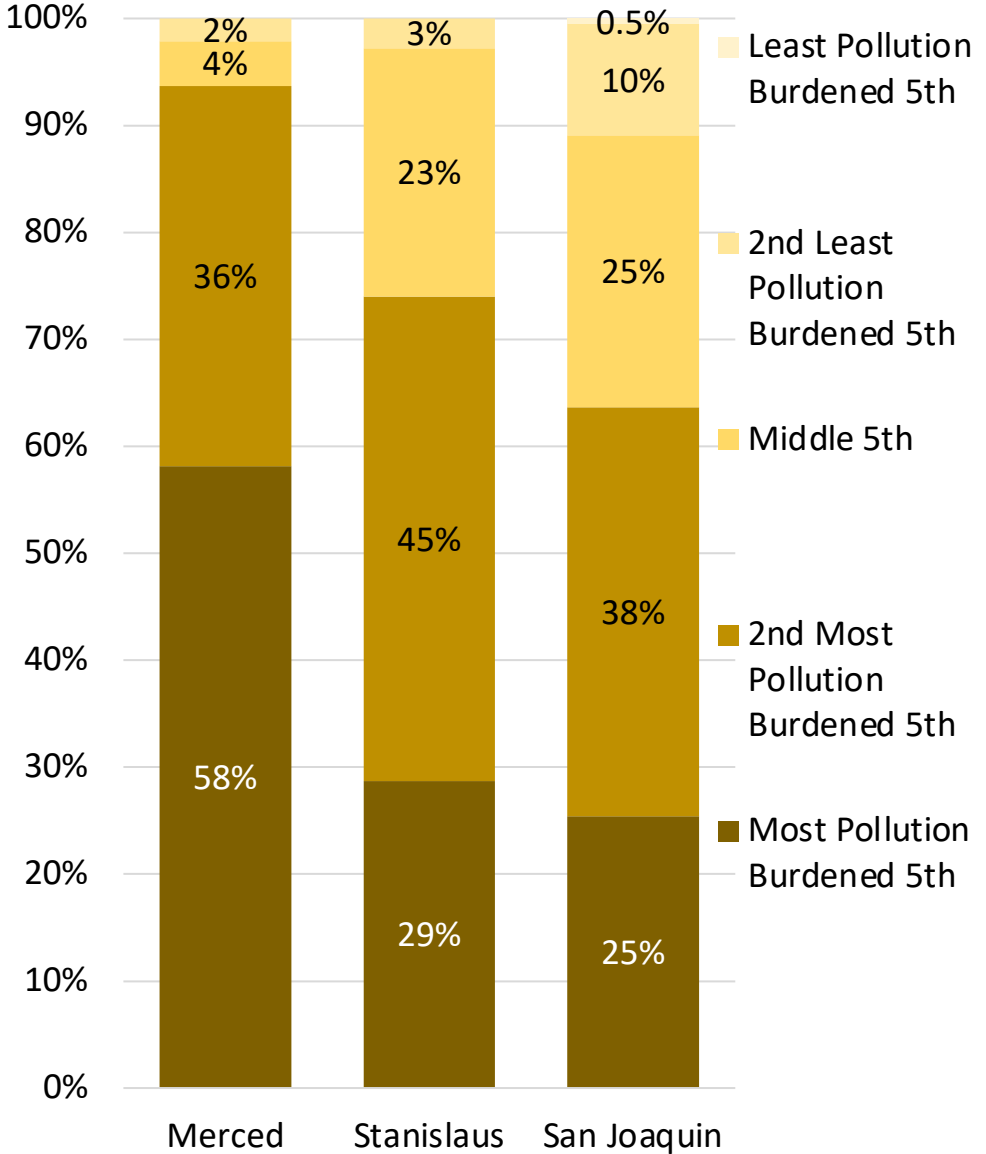
 - Sensitive Populations Indicators**

 - For example: Asthma, Cardiovascular Disease, Low Birth Weight Infants.

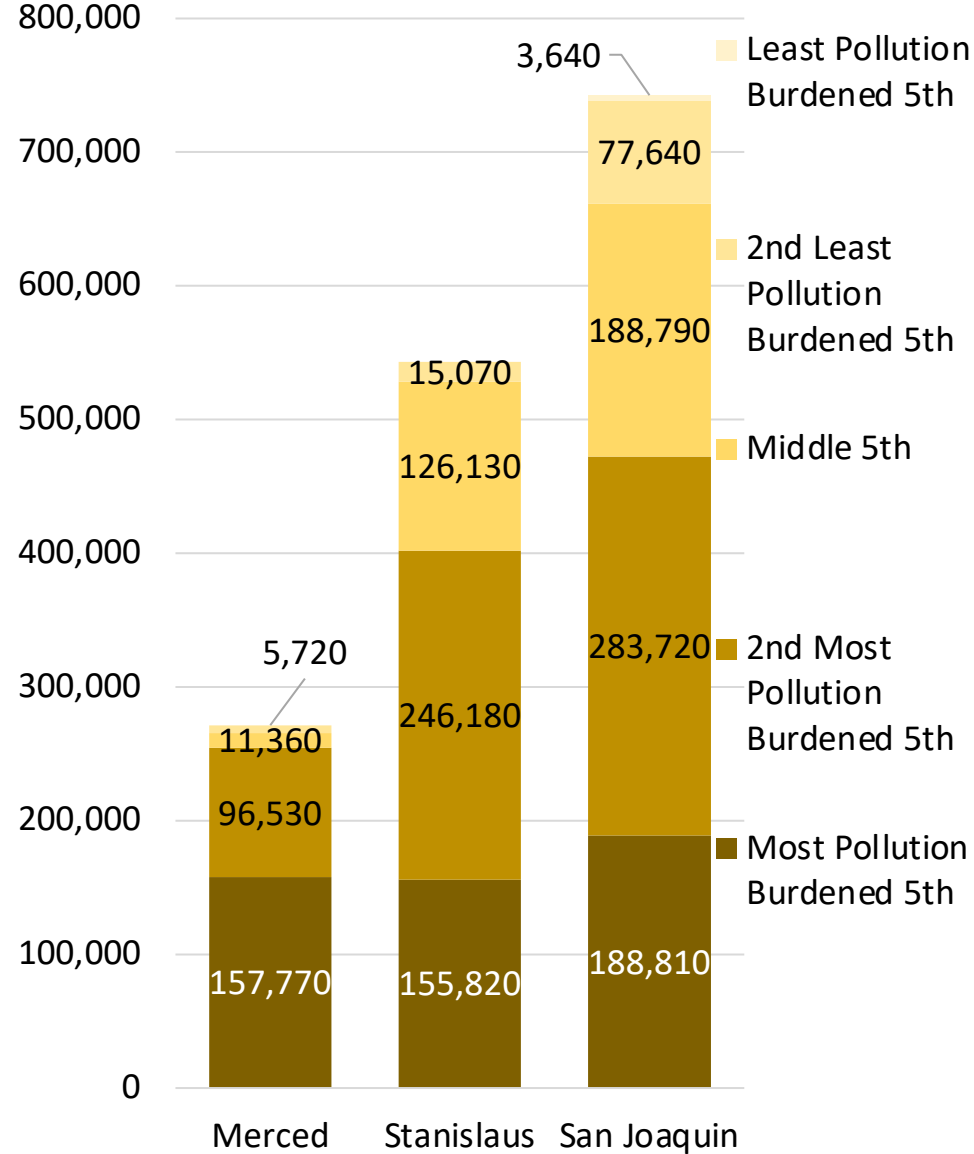
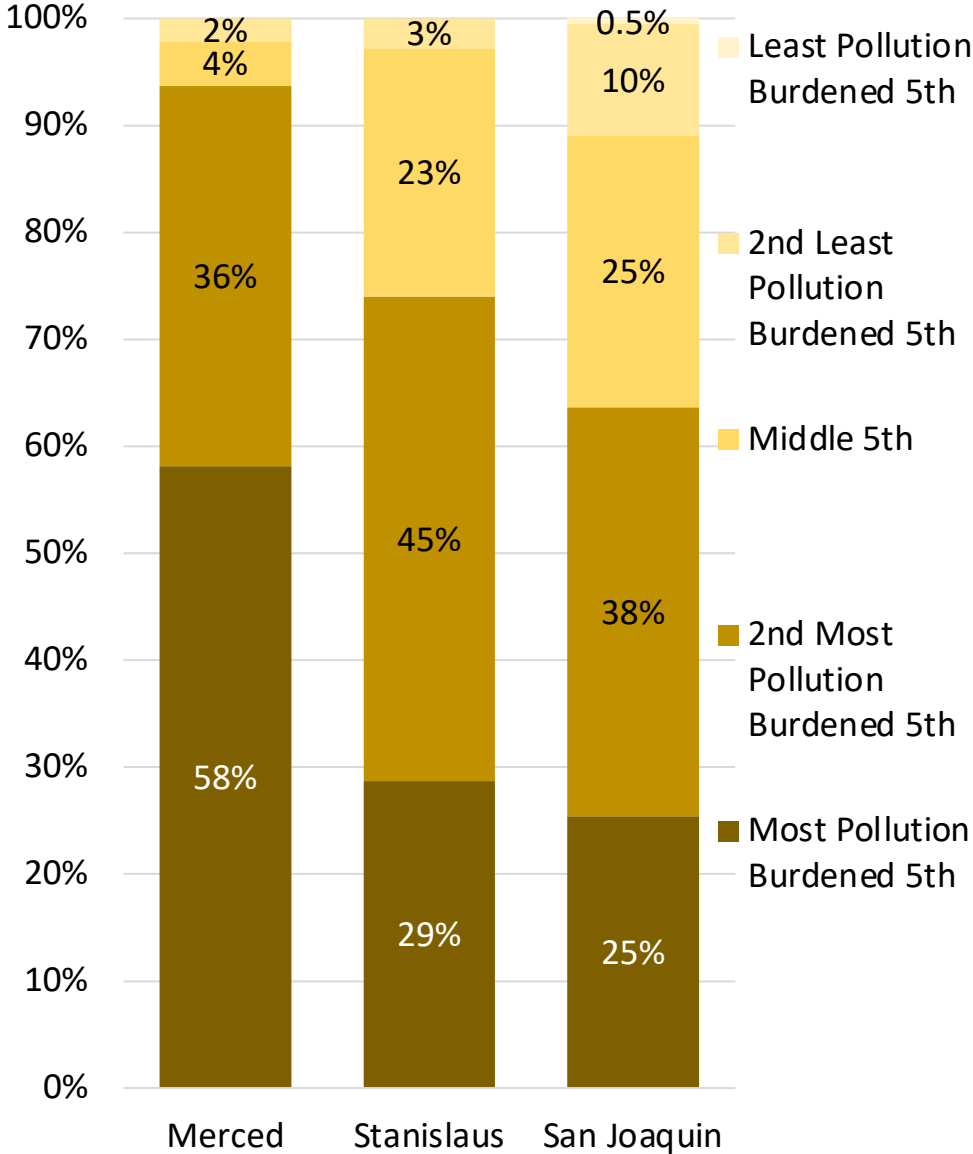
 - Socioeconomic Factor Indicators**

 - For example: Educational Attainment, Linguistic Isolation, Poverty, Unemployment.

NSJV Communities Pollution Burden



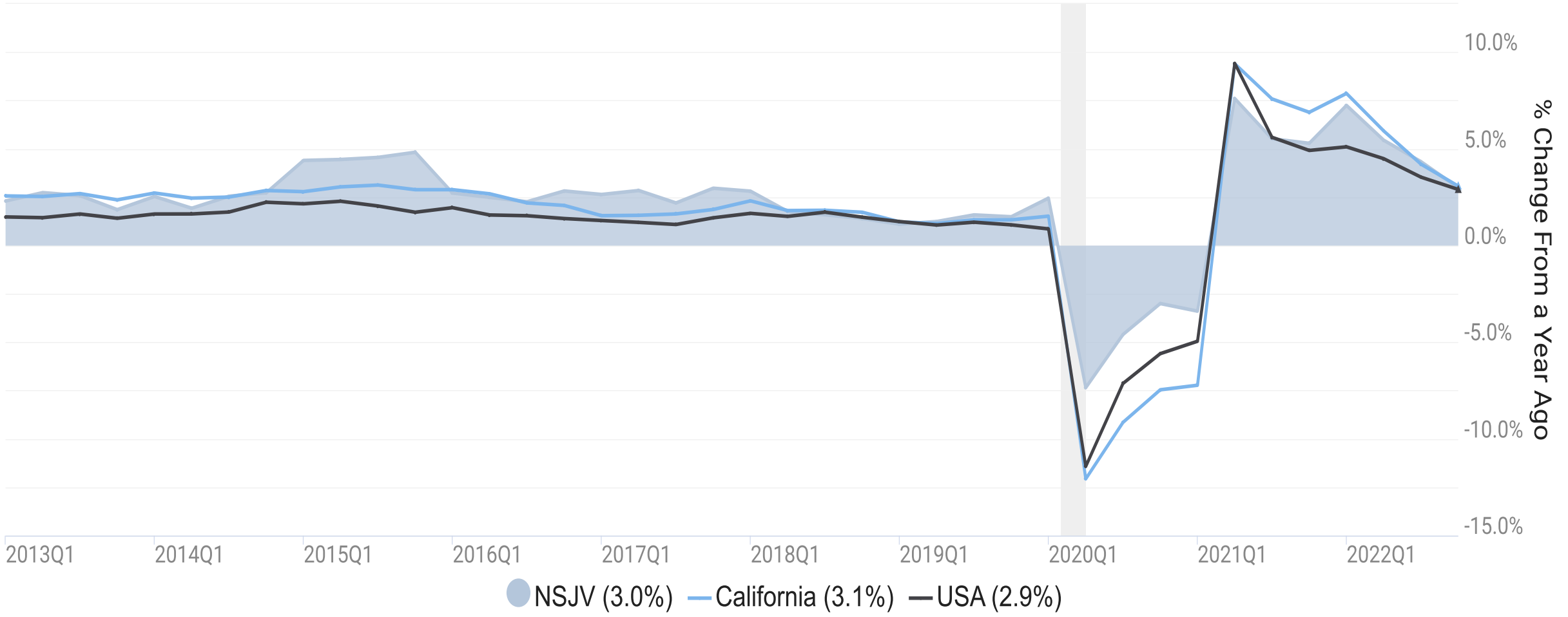
NSJV Communities Pollution Burden



Economy

Employment Trends

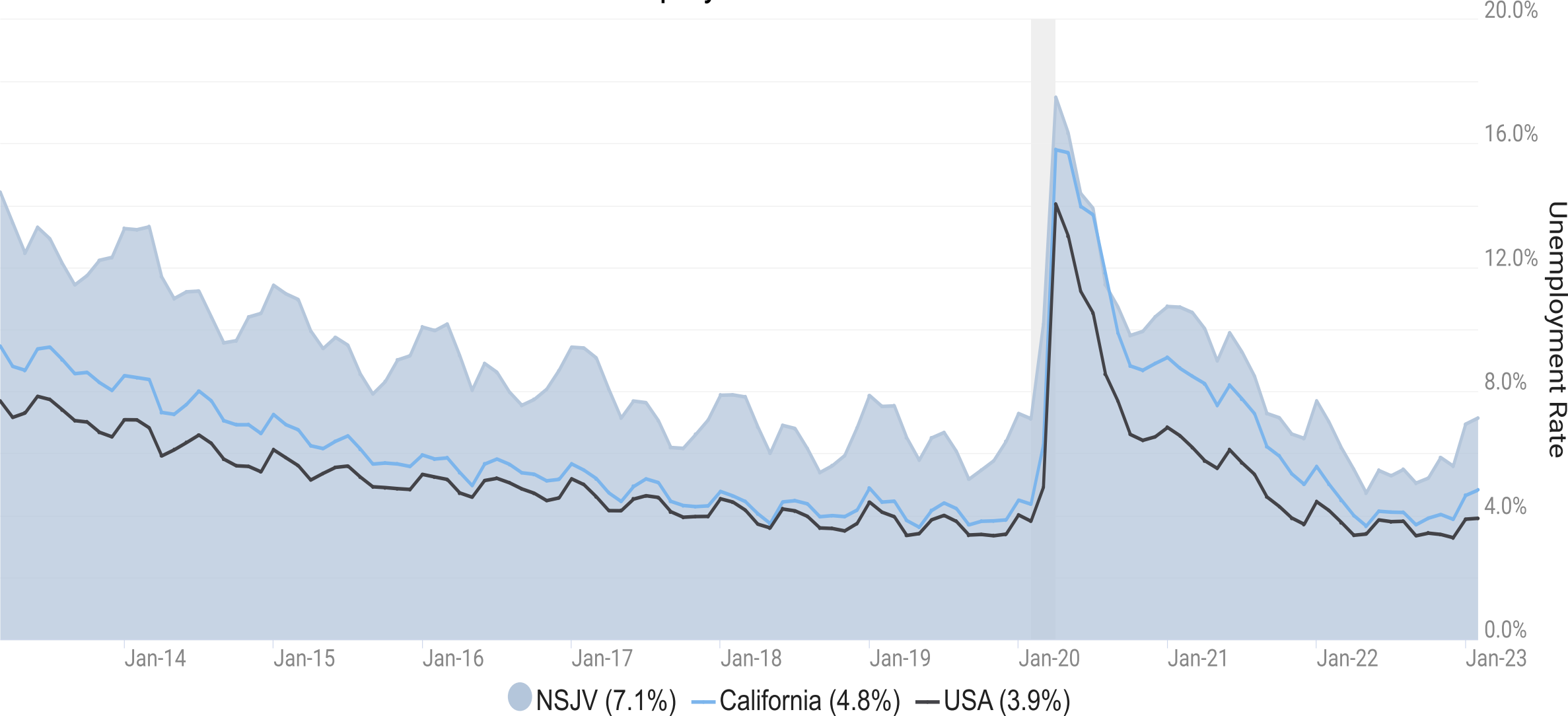
Employment for NSJV



Source: JobsEQ®. Data as of 2022Q4. The shaded areas of the graph represent national recessions.

Unemployment Rate

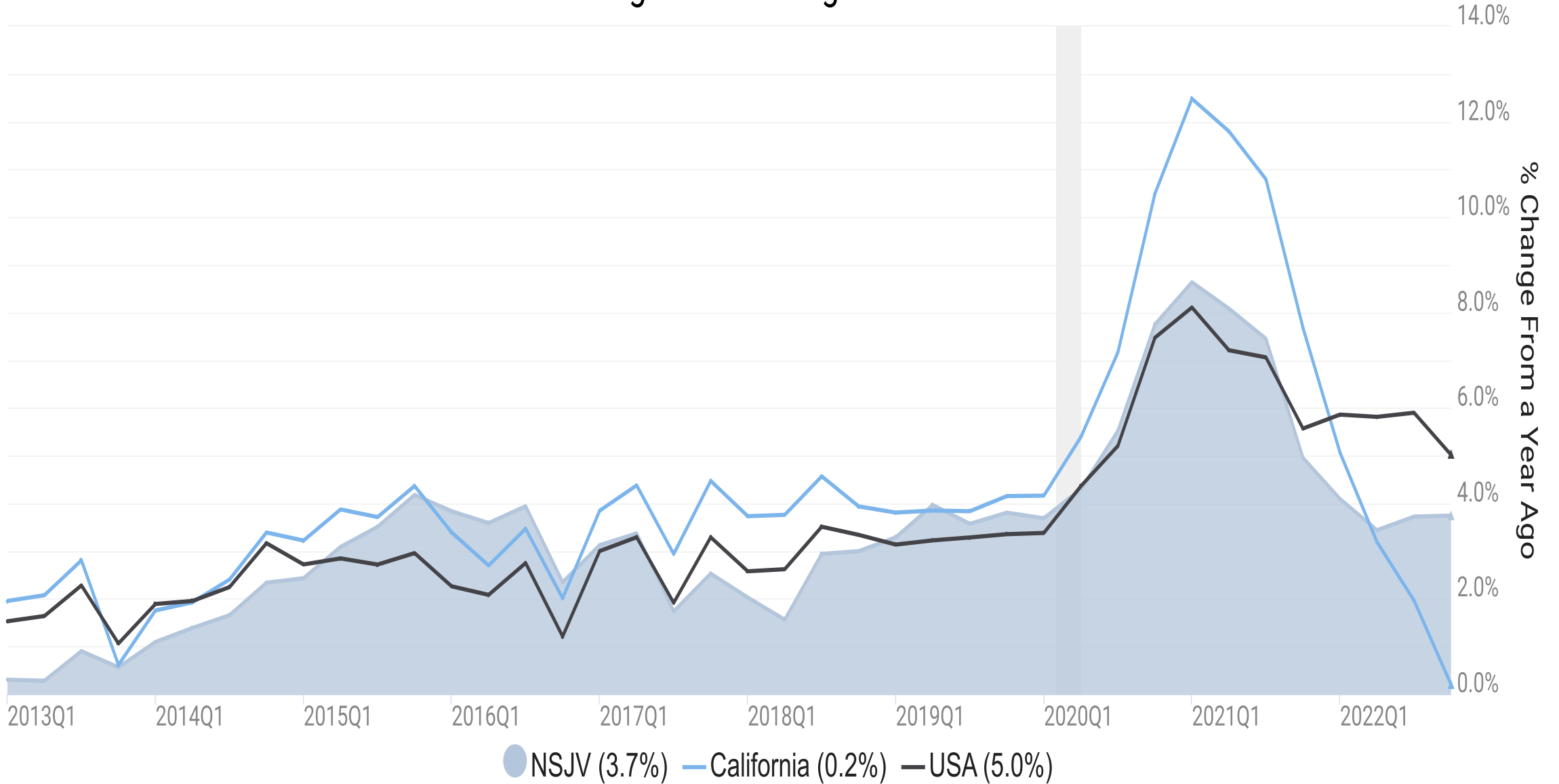
Unemployment Rate for NSJV



Source: JobsEQ®. Data as of Feb 2023. The shaded areas of the graph represent national recessions.

Wage Trends

Average Annual Wages for NSJV



Source: JobsEQ®. Data as of 2022Q4. The shaded areas of the graph represent national recessions.

Industry Snapshot

Industry	Current			5-Year History		
	Empl	Avg Ann Wages	LQ	Empl Change	Ann %	
Health Care and Social Assistance	85,730	\$63,983		1	4,384	1.10%
Transportation and Warehousing	65,282	\$59,084		2.2	23,475	9.30%
Retail Trade	61,409	\$39,899		1.02	484	0.20%
Educational Services	57,125	\$61,961		1.2	-96	0.00%
Manufacturing	55,688	\$68,505		1.15	5,048	1.90%
Accommodation and Food Services	48,178	\$26,037		0.95	6,609	3.00%
Agriculture, Forestry, Fishing and Hunting	46,262	\$55,983		5.88	-2,167	-0.90%
Construction	34,343	\$67,840		0.97	6,873	4.60%
Administrative & Support, Waste Management & Remediation Services	29,236	\$42,852		0.75	4,434	3.30%
Public Administration	24,082	\$79,465		0.88	675	0.60%
Other Services (except Public Administration)	21,032	\$37,499		0.82	1,219	1.20%
Wholesale Trade	19,009	\$74,113		0.85	-1,242	-1.30%
Professional, Scientific, and Technical Services	15,142	\$66,420		0.34	1,204	1.70%
Finance and Insurance	9,393	\$77,281		0.39	-635	-1.30%
Real Estate and Rental and Leasing	7,643	\$60,012		0.72	778	2.20%
Arts, Entertainment, and Recreation	5,958	\$28,361		0.51	-577	-1.80%
Utilities	4,425	\$123,639		1.47	456	2.20%
Management of Companies and Enterprises	4,357	\$110,146		0.47	-246	-1.10%
Information	2,687	\$61,420		0.22	-1,099	-6.60%
Unclassified	262	\$56,195		0.22	-1,130	-28.40%
Mining, Quarrying, and Oil and Gas Extraction	51	\$99,901		0.02	-91	-18.50%
Total - All Industries	597,294	\$57,194		1	48,356	1.70%

Source: JobsEQ using QCEW Q4-2022

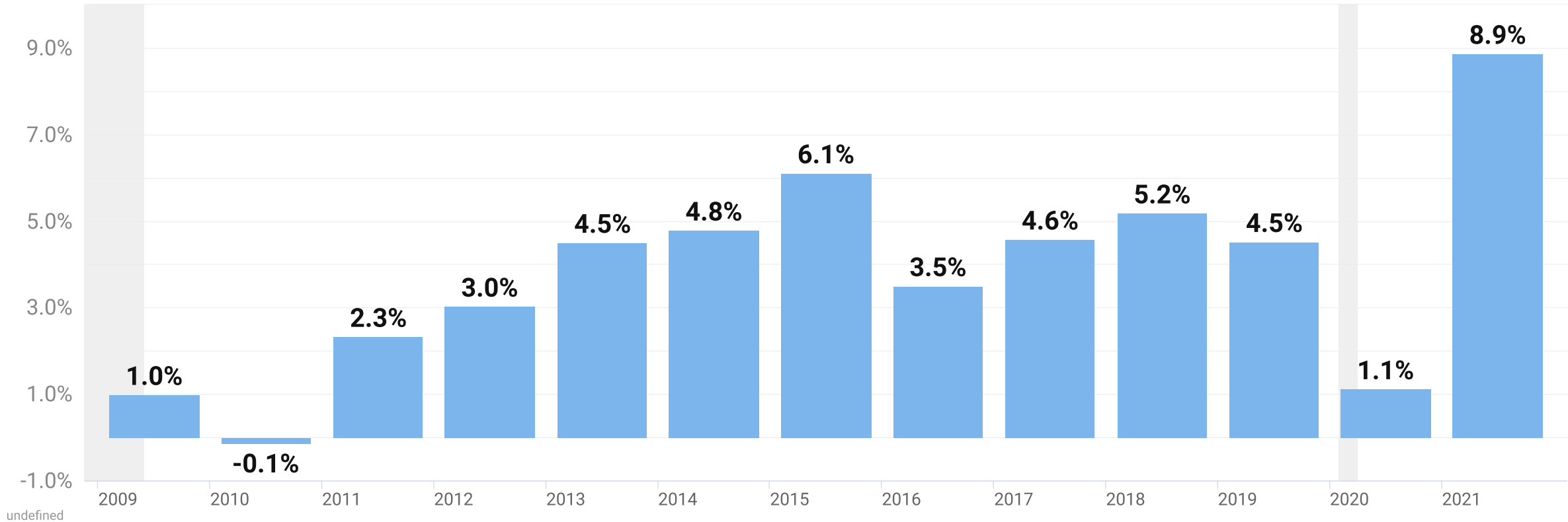
Occupational Snapshot

Occupation	Current			5-Year History		
	Empl	Mean Ann Wages	LQ	Empl Change	Ann %	
Transportation and Material Moving	87,967	\$46,500		1.68	20,959	5.60%
Office and Administrative Support	58,813	\$49,000		0.8	-362	-0.10%
Sales and Related	50,540	\$47,700		0.91	-725	-0.30%
Food Preparation and Serving Related	47,842	\$36,900		1.01	5,058	2.30%
Educational Instruction and Library	38,999	\$74,400		1.23	422	0.20%
Management	37,435	\$113,800		0.92	2,855	1.60%
Production	35,622	\$45,400		1.05	1,495	0.90%
Farming, Fishing, and Forestry	31,668	\$35,100		8.32	-624	-0.40%
Healthcare Support	30,735	\$37,600		1.17	2,712	1.90%
Healthcare Practitioners and Technical	30,140	\$119,600		0.88	2,612	1.80%
Construction and Extraction	25,561	\$64,800		0.95	3,779	3.30%
Business and Financial Operations	24,236	\$78,600		0.63	4,248	3.90%
Installation, Maintenance, and Repair	20,694	\$59,400		0.9	1,094	1.10%
Building and Grounds Cleaning and Maintenance	17,014	\$43,100		0.86	927	1.10%
Protective Service	12,136	\$66,000		0.95	1,331	2.40%
Personal Care and Service	11,980	\$40,000		0.83	294	0.50%
Community and Social Service	10,576	\$62,400		1	-90	-0.20%
Computer and Mathematical	8,330	\$94,100		0.4	1,544	4.20%
Arts, Design, Entertainment, Sports, and Media	5,886	\$65,000		0.56	4	0.00%
Architecture and Engineering	4,654	\$96,700		0.48	486	2.20%
Life, Physical, and Social Science	4,012	\$86,200		0.76	318	1.70%
Legal	2,455	\$116,600		0.48	19	0.20%
Total - All Occupations	597,294	\$59,400		1	48,356	1.70%

Source: JobsEQ using QCEW Q4-2022

NSJV Gross Regional Product

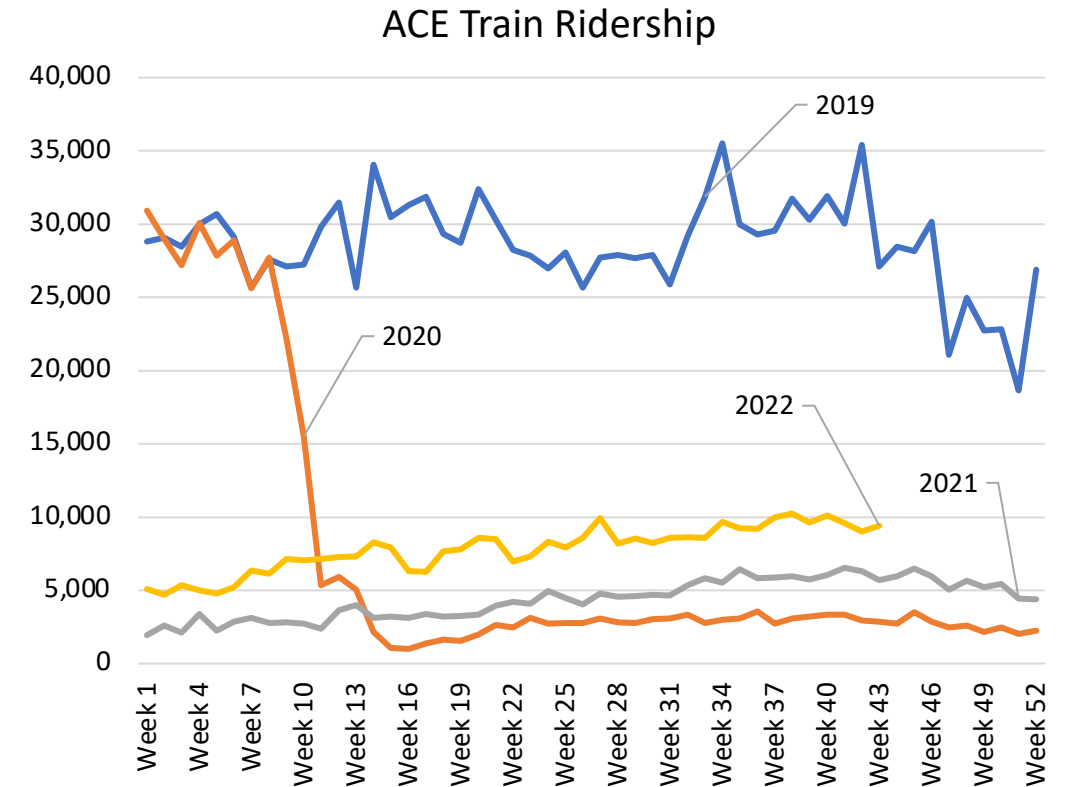
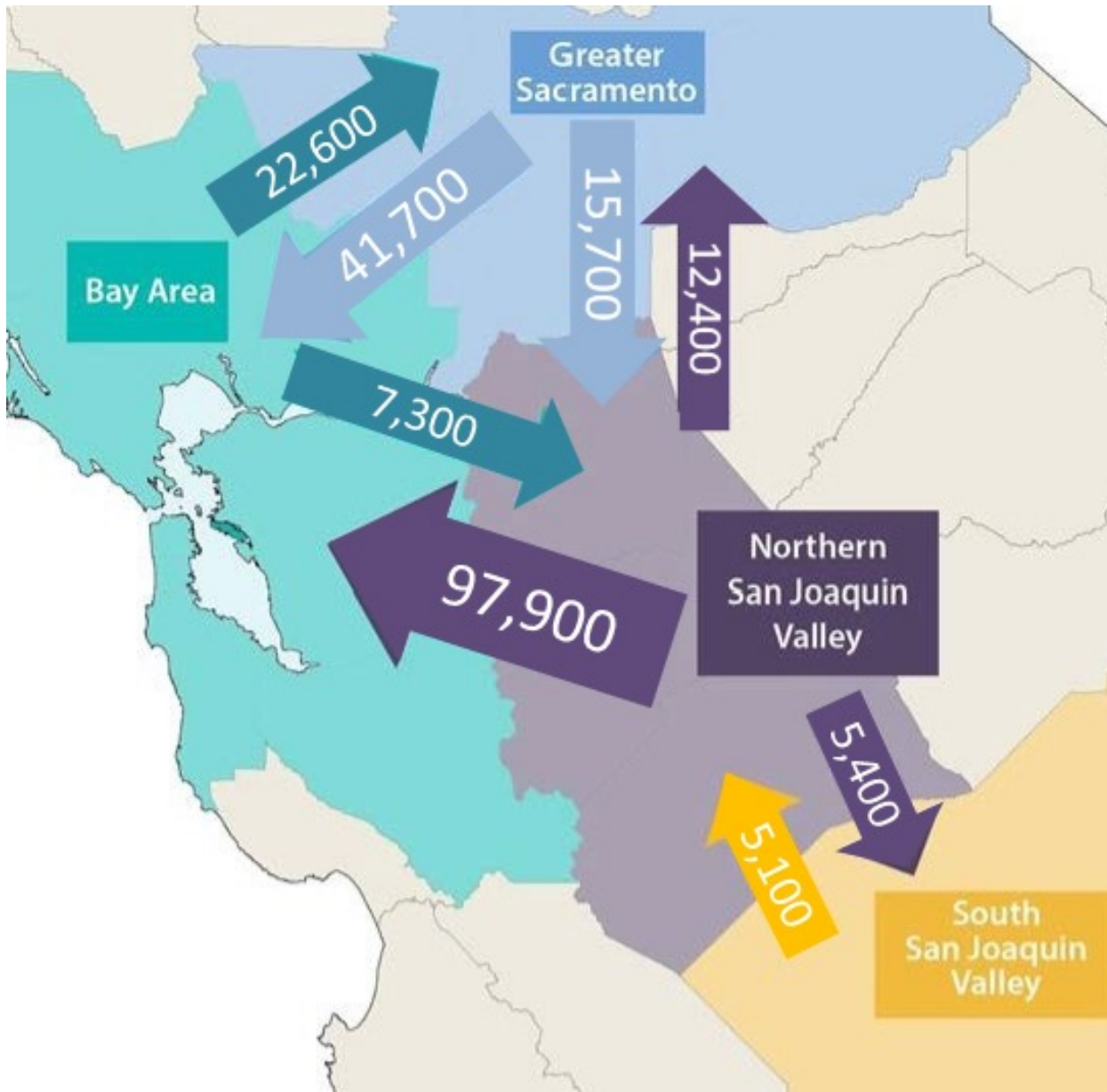
1 year % Change in GDP



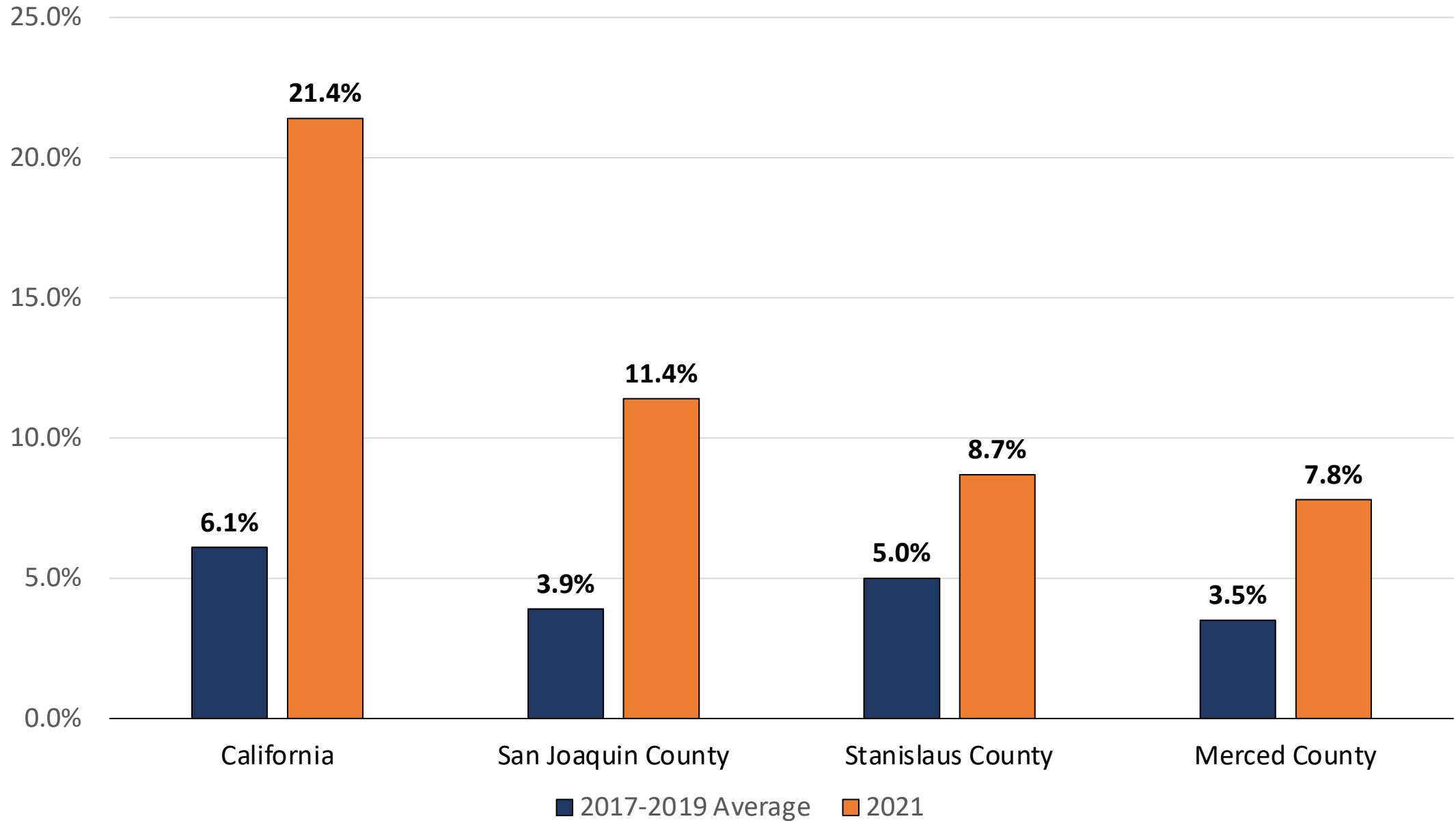
As of 2021, total GRP in the NSJV was \$64.7 billion

Commute Patterns

2019 Commute Flows Across the NCMR

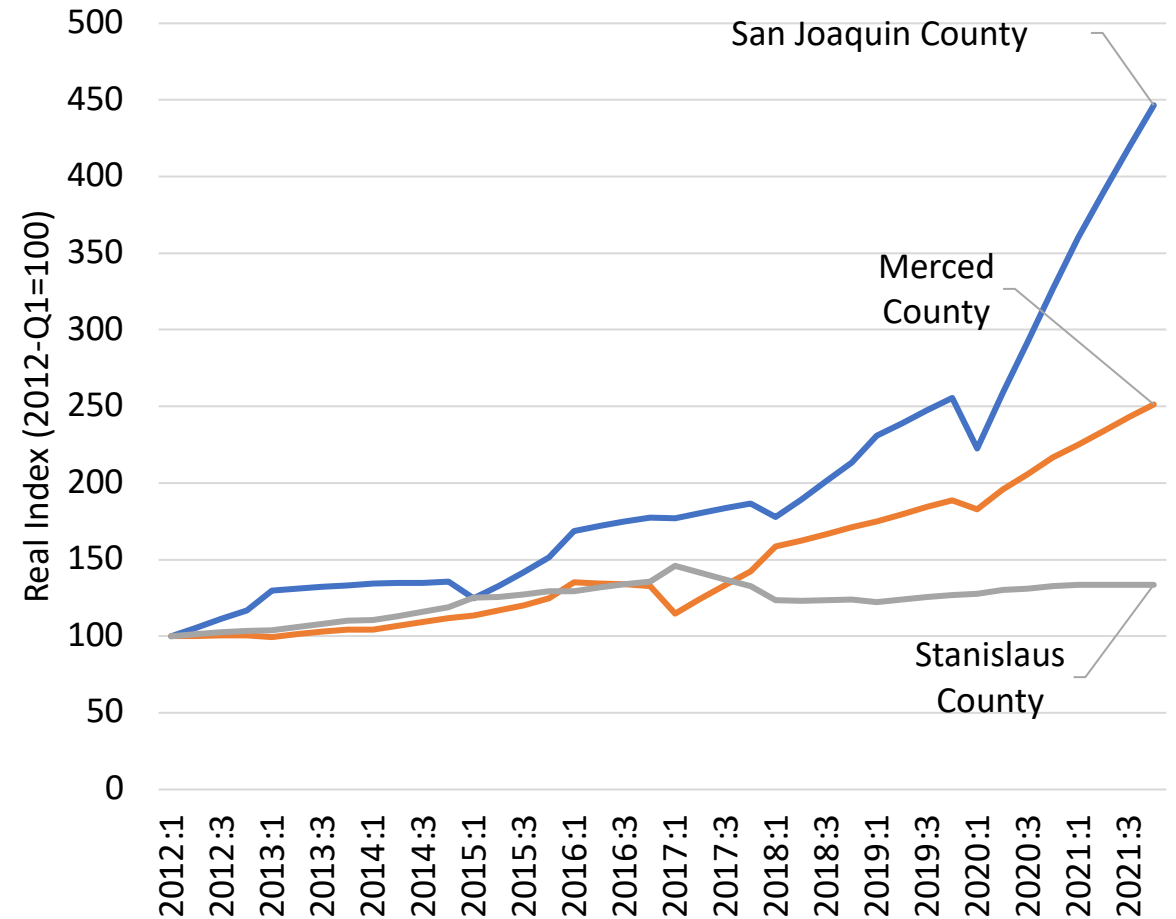
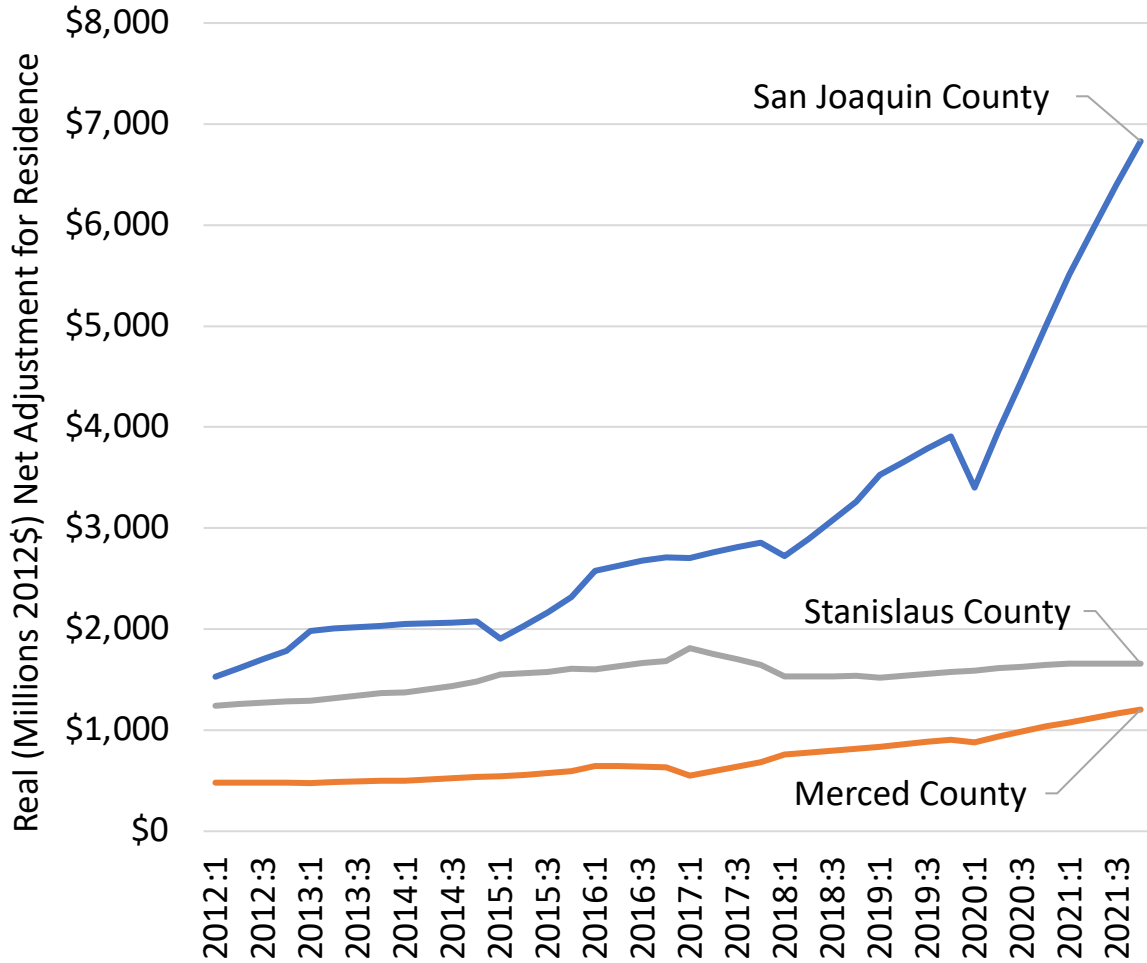


Remote Work Impacts: NSJV

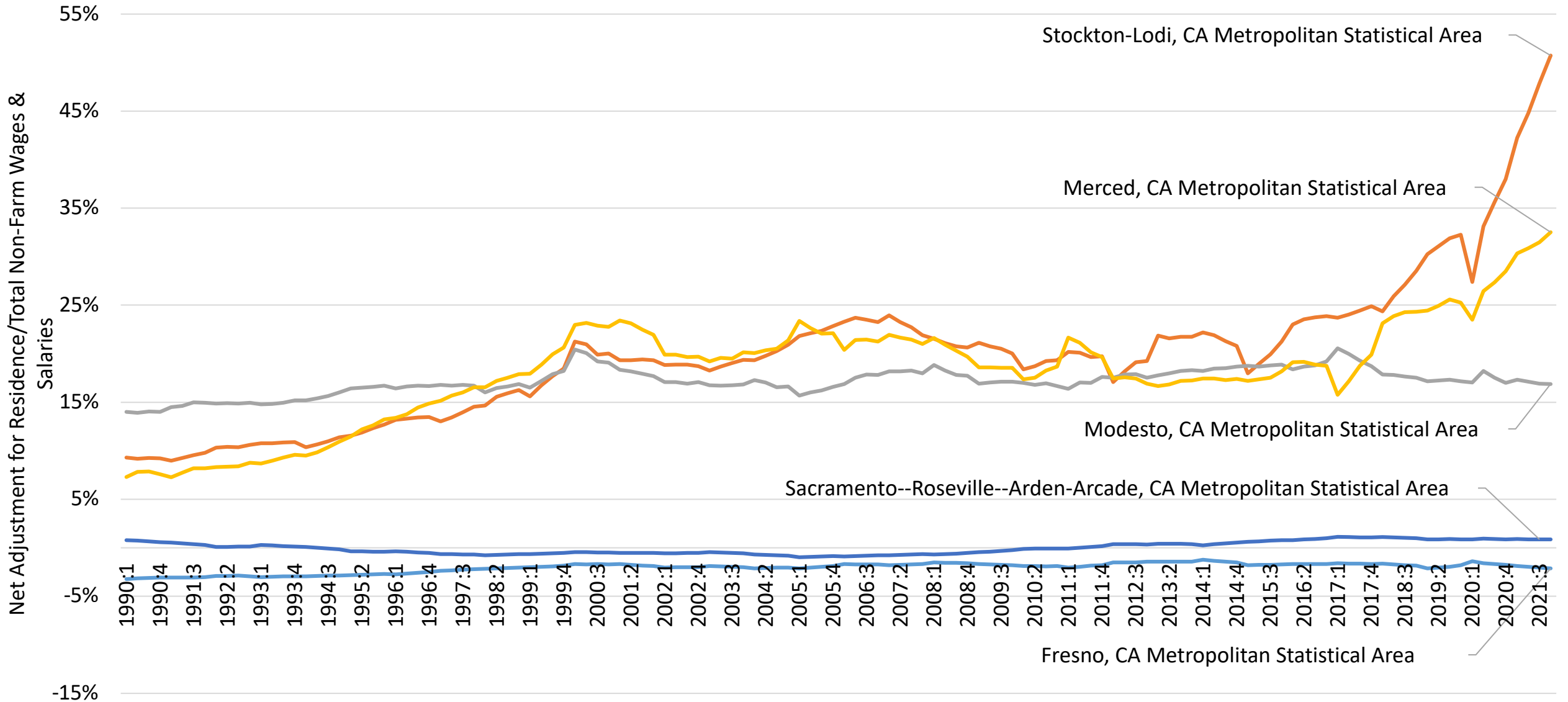


Net Adjustment for Residence

- San Joaquin County Nominal \$8.4 billion in 2021
- Stanislaus County Nominal \$2.0 billion in 2021
- Merced County Nominal \$1.4 billion in 2021



Net Adjustment for Residence as % of Total Wages & Salaries

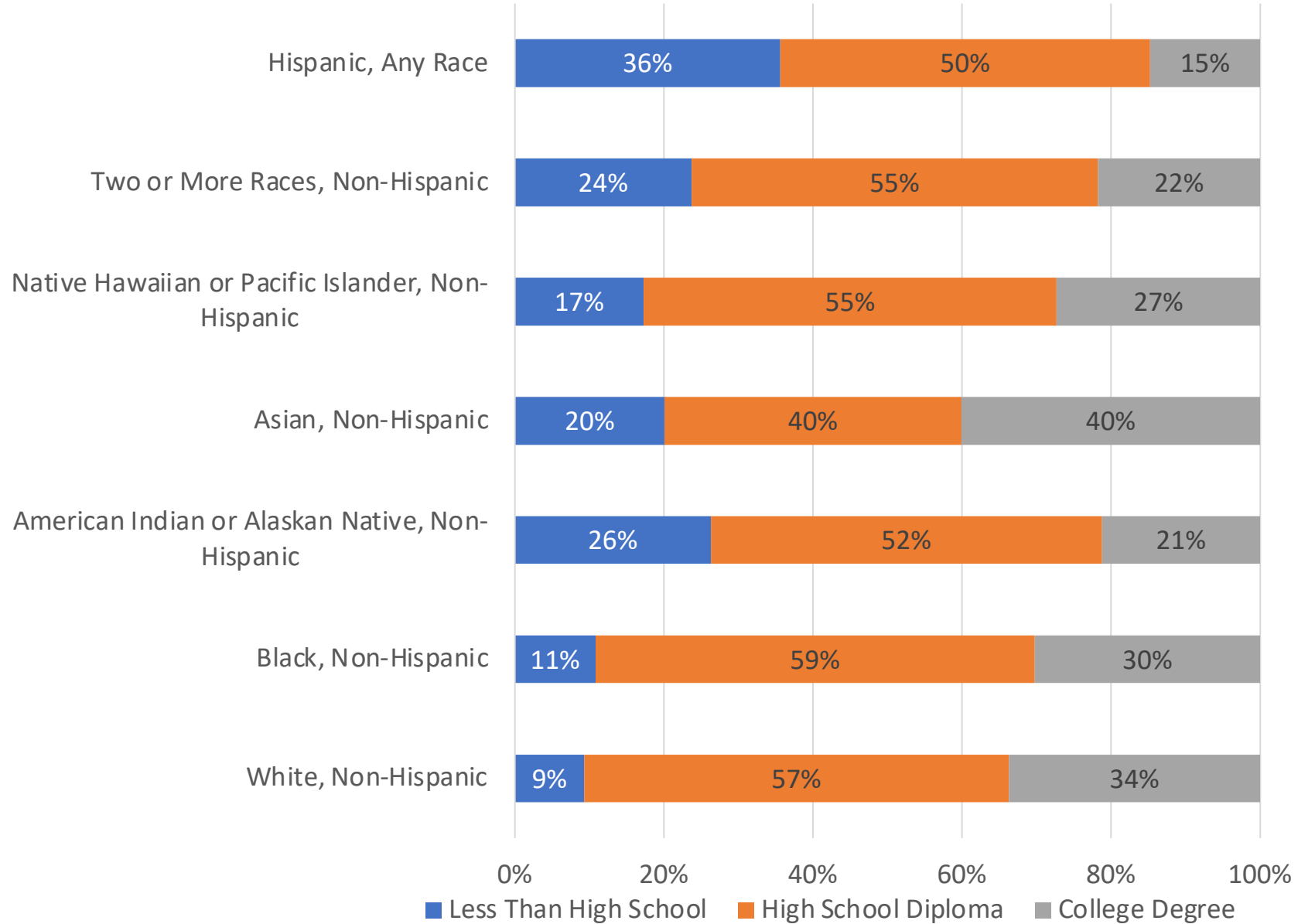


Socio-Cultural

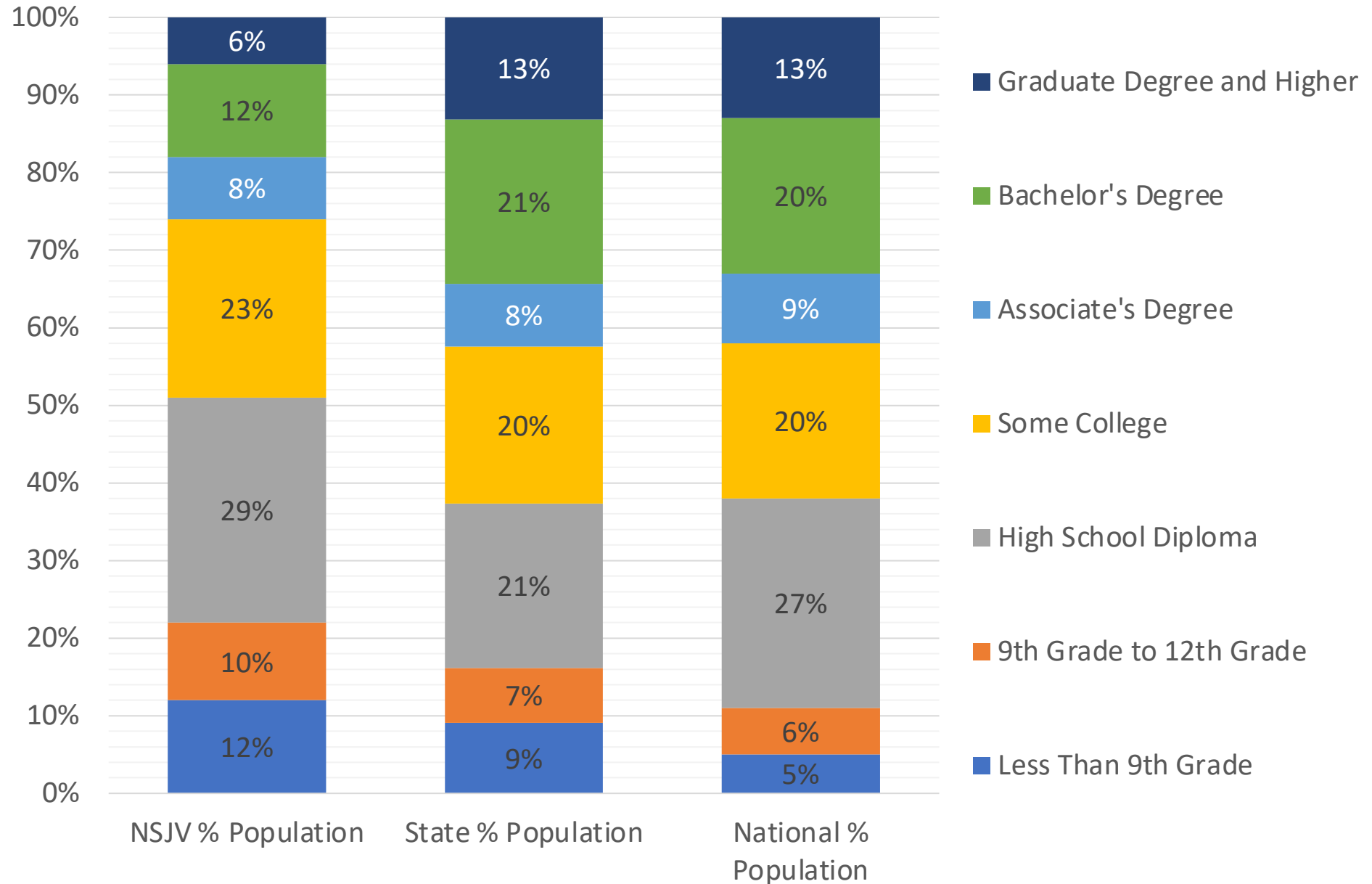
A Selection of Socio-Cultural Indicators

	<u>NSJV</u>	California	USA
Poverty Level (of all people)	15%	13%	13%
Households Receiving Food Stamps/SNAP	15%	9%	11%
Enrolled in Grade 12 (% of total population)	2%	2%	1%
Disconnected Youth	2%	2%	3%
Children in Single Parent Families (% of all children)	36%	33%	34%
Uninsured	6%	7%	9%
With a Disability, Age 18-64	11%	8%	10%
With a Disability, Age 18-64, Labor Force Participation Rate	38%	43%	43%
Foreign Born	23%	27%	14%
Speak English Less Than Very Well (population 5 yrs and over)	17%	17%	8%

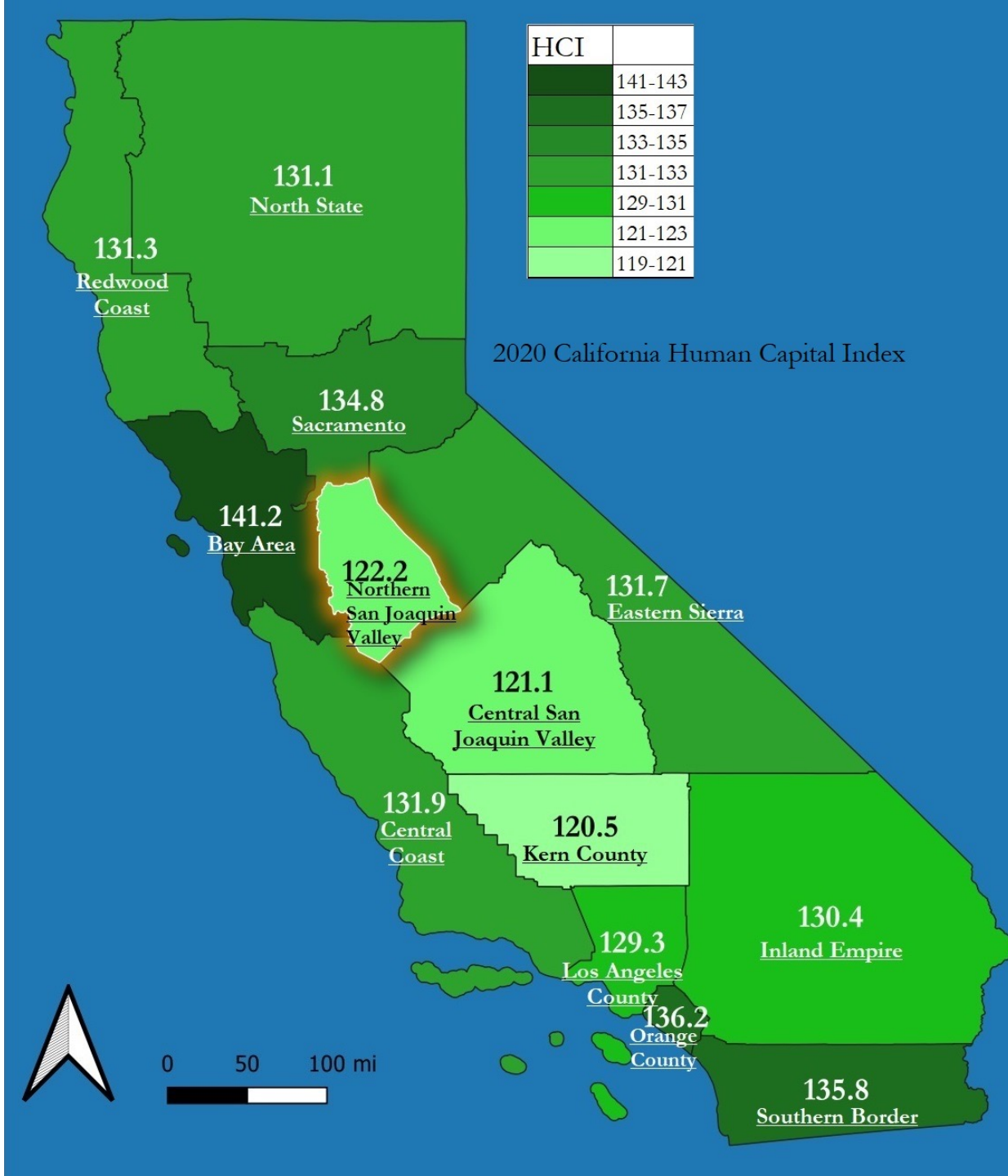
NSJV Educational Attainment by Race/Ethnicity



Comparative NSJV Educational



Human Capital Index 2020



Geography	% Change 2015-20
Central San Joaquin Valley	2.50%
Los Angeles County	2.10%
Bay Area	2.10%
Southern Border	1.80%
Inland Empire	1.80%
Orange County	1.80%
Central Coast	1.80%
Kern County	1.60%
Sacramento	1.40%
<u>Northern San Joaquin Valley</u>	<u>1.20%</u>
North State	1.00%
Redwood Coast	0.80%
Eastern Sierra	0.60%

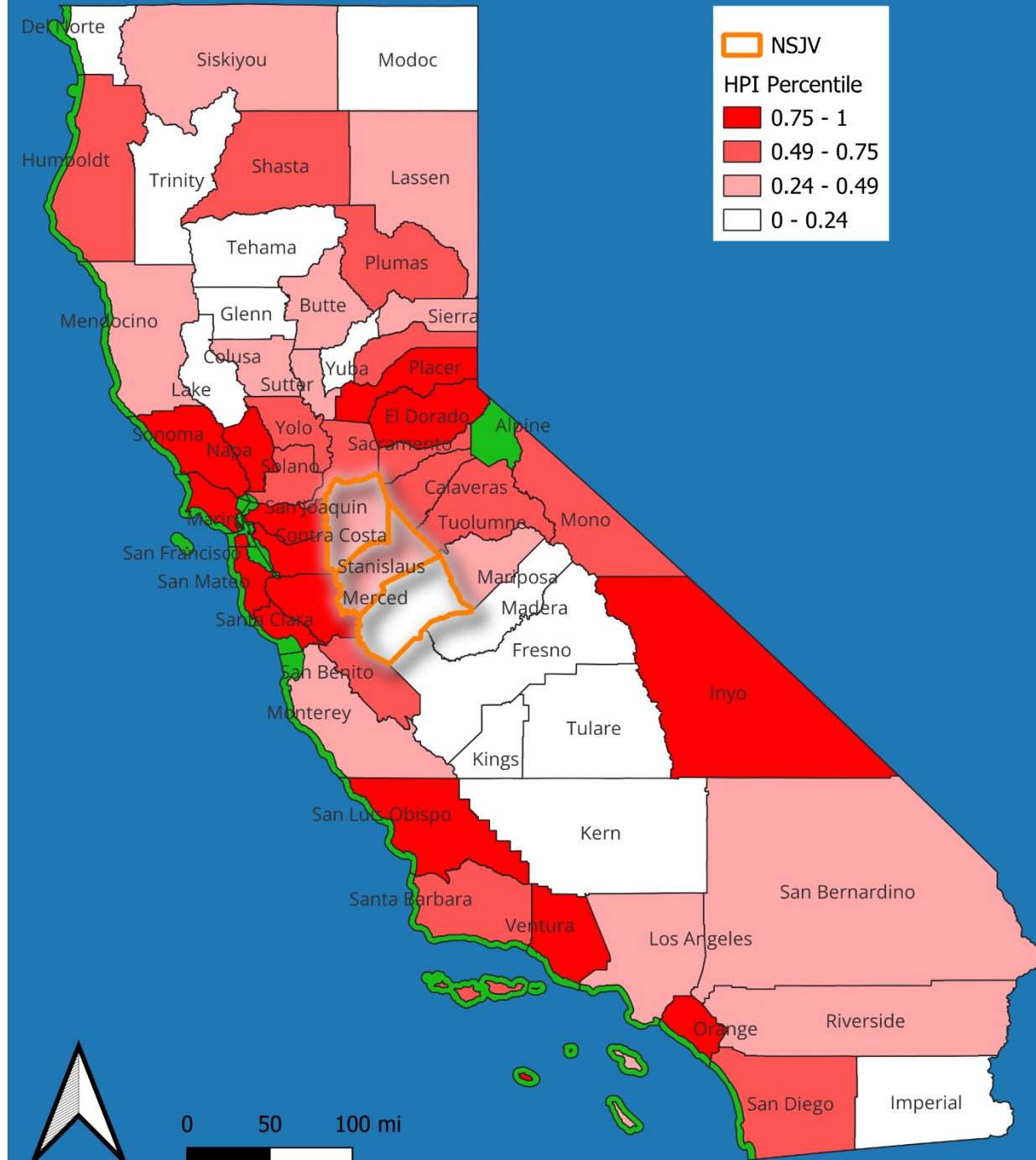
In 2020 the NSJV HCI Scores:

- San Joaquin => 123.7
- Stanislaus => 122.6
- Merced => 116.8

NSJV Colleges and Universities

School	Certificates and 2yr Awards	4yr Awards	Total School Enrollment 2020-21	Avg Net Price
San Joaquin Delta College	3,076	0	18,224	\$17,503
Modesto Junior College	2,808	9	16,365	\$14,421
California State University-Stanislaus	0	2,507	11,163	\$7,230
Merced College	2,930	0	10,645	\$13,426
University of California-Merced	0	1,941	9,018	\$11,586
University of the Pacific	0	872	6,263	\$21,311
Teachers College of San Joaquin	249	0	868	n/a
United Education Institute-UEI College Stockton	429	0	706	\$29,133
Humphreys University-Stockton and Modesto Campuses	35	86	401	\$7,288
Paul Mitchell the School-Modesto	198	0	334	\$14,673
Carrington College-Stockton	189	0	332	\$30,746
San Joaquin Valley College-Modesto	222	0	328	\$20,248
Milan Institute-Merced	168	0	280	\$24,630
California College of Barbering and Cosmetology	136	0	260	\$12,400
North Adrian's College of Beauty Inc	70	0	215	\$20,088
Sierra College of Beauty	72	0	145	\$8,449
Adrian's Beauty College of Turlock	50	0	85	\$18,381
Xavier College School of Nursing	72	0	82	\$21,313
DeHart Technical School	49	0	76	n/a
California Beauty School	45	0	47	\$21,016
Stellar Career College	28	0	21	\$15,446
Total	10,826	5,415	75,858	n/a

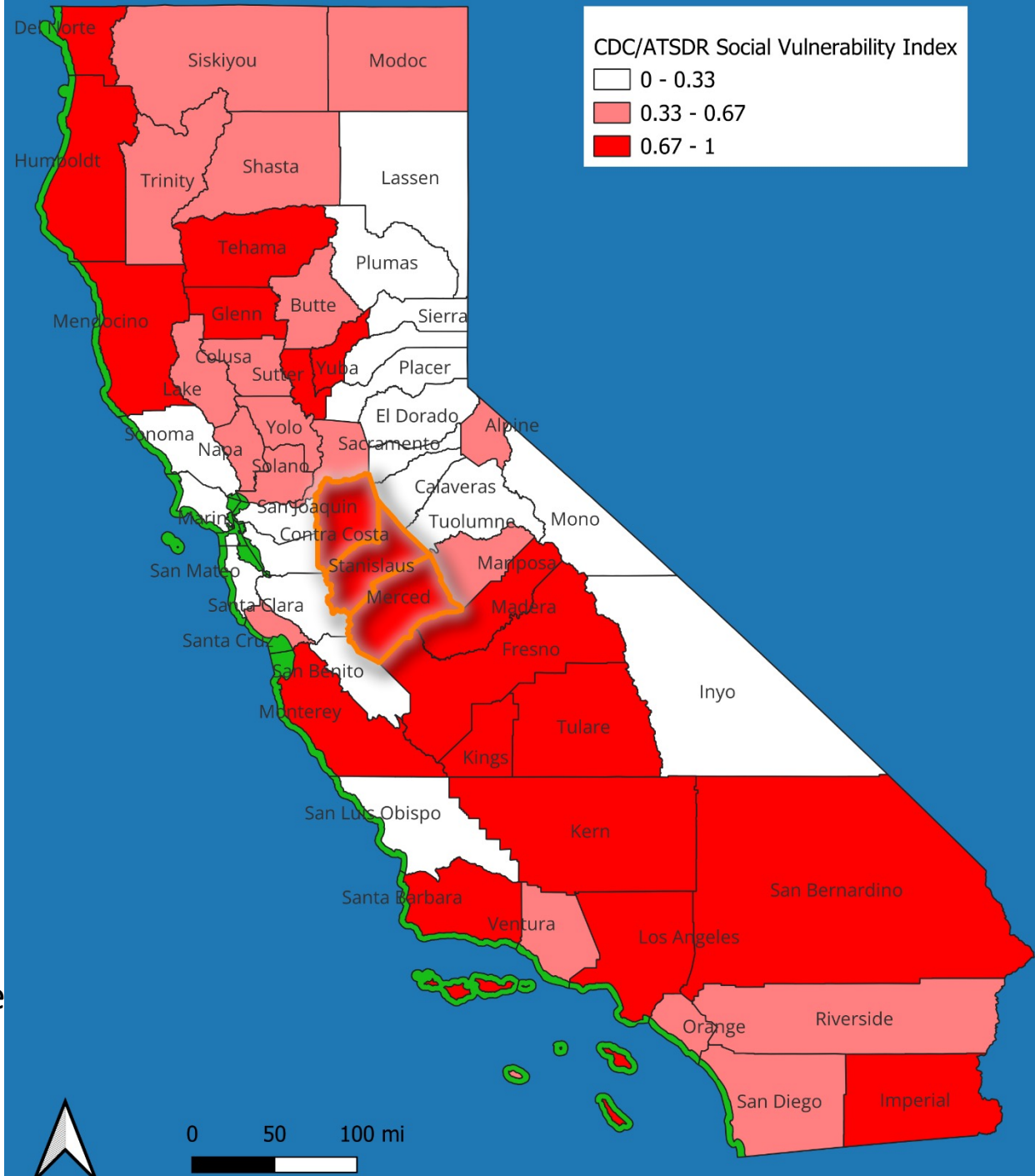
Healthy Places Index 2022 Percentiles



The HPI evaluates 23 key drivers of health and life expectancy at birth. Based on that analysis, it produces a score ranking from 1 to 99 that shows the relative impact of conditions in a selected area compared to all other such places in the state.

- In 2022 the NSJV HPI Scores:
- San Joaquin => 41st Percentile
 - Stanislaus => 30th Percentile
 - Merced => 14th Percentile

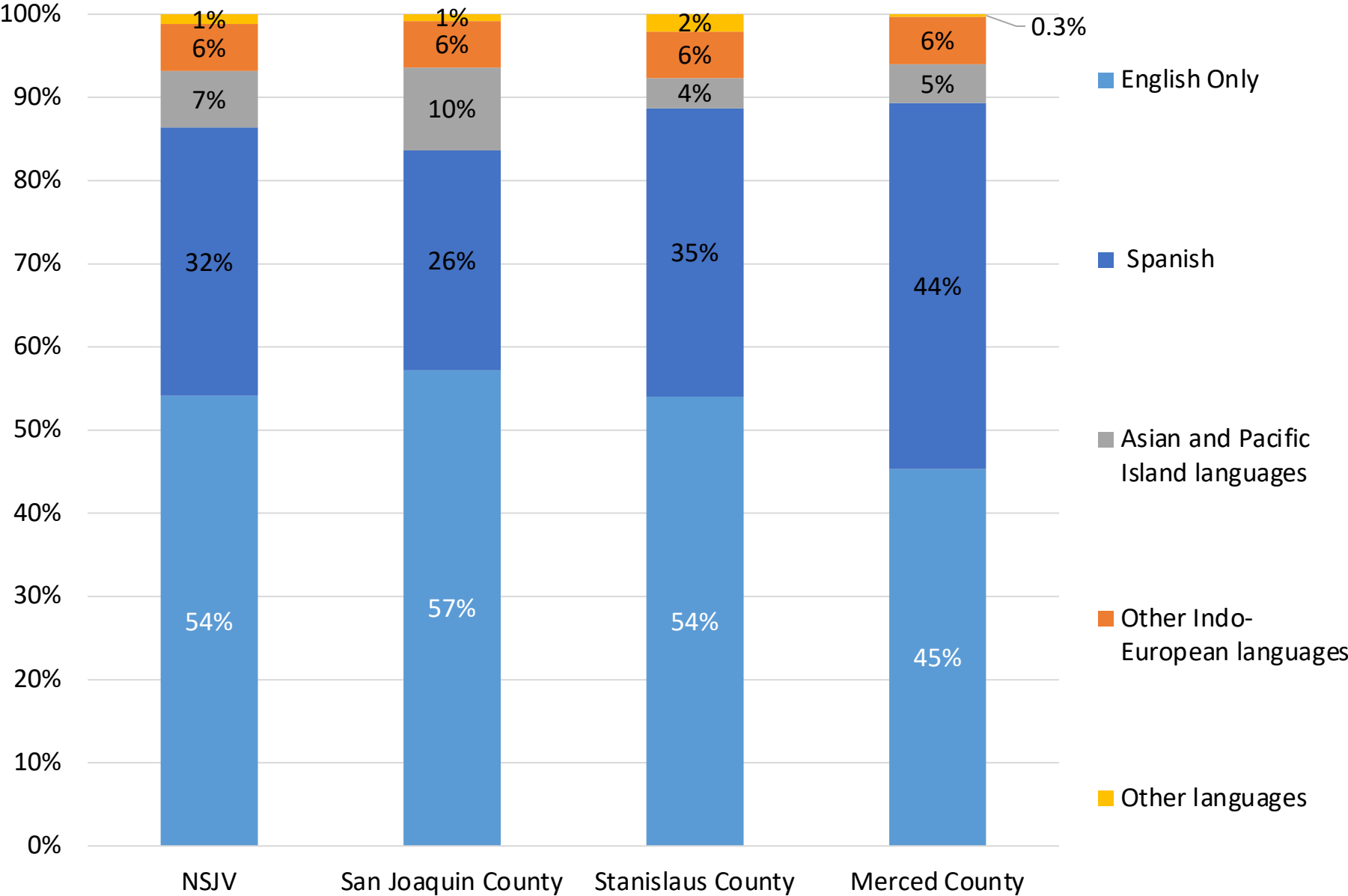
Social Vulnerability Index 2020 Percentiles



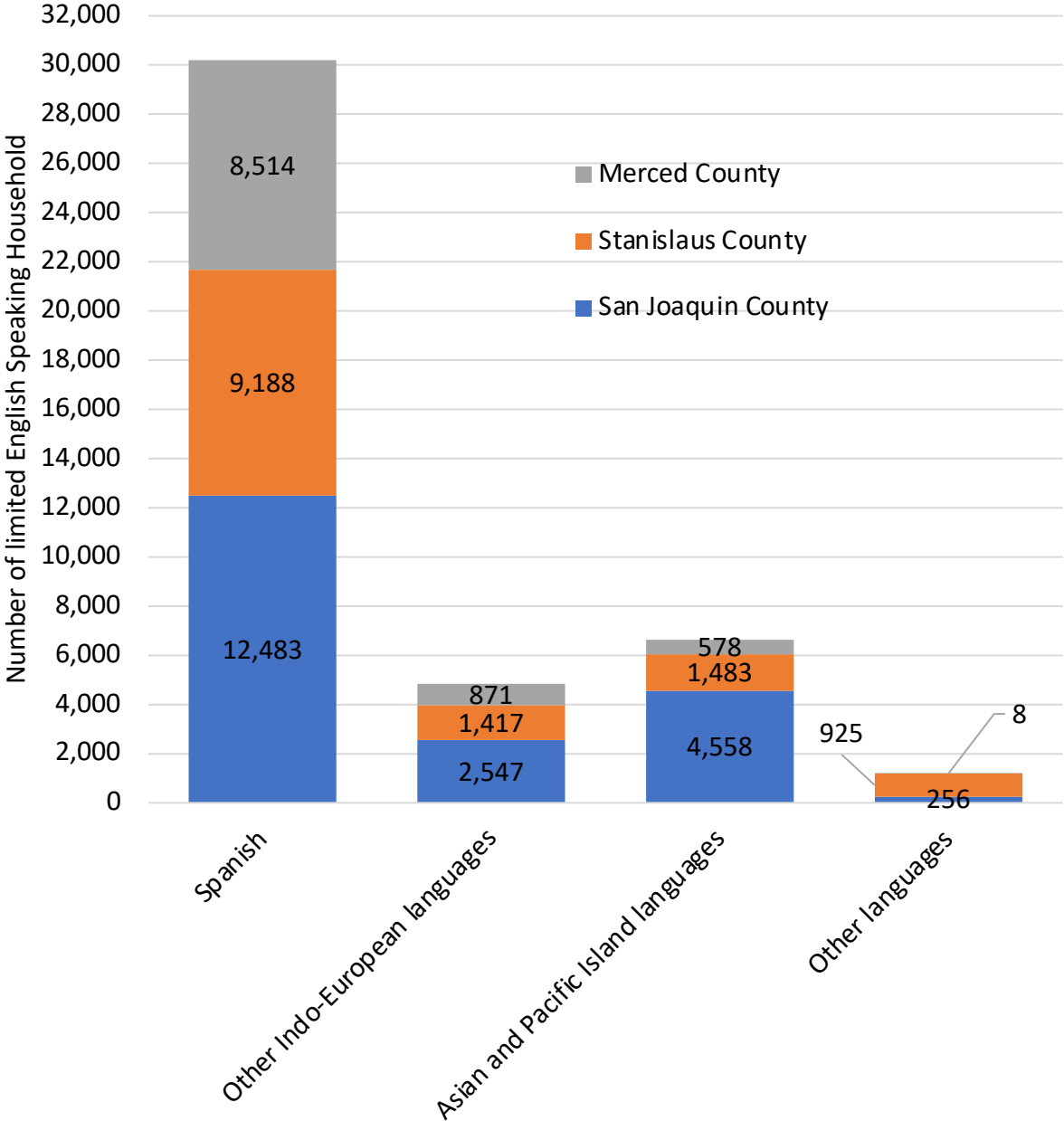
The SVI evaluates 16 social factors, including unemployment, racial and ethnic minority status, and disability to help public health officials and emergency response planners identify and map the communities that will most likely need support before, during, and after a hazardous event.

- In 2020 the NSJV SVI Scores:
- San Joaquin => 21st Percentile
 - Stanislaus => 28th Percentile
 - Merced => 2nd Percentile

Languages Spoken at Home



Limited English-speaking households



- 42,830 Limited English Speaking NSJV Households
 - 30,190 Spanish Speaking (70%)
 - 12,640 Other Languages (30%)

	% Limited English
NSJV	8.7%
San Joaquin County	8.5%
Stanislaus County	7.4%
Merced County	12.2%

Open Call for NSJV Informational Resources

We are seeking widespread participation identifying existing informational resources that consider the needs and opportunities of the economy, environment, and public health of the NSJV Region

<https://bit.ly/NSJV-Info>

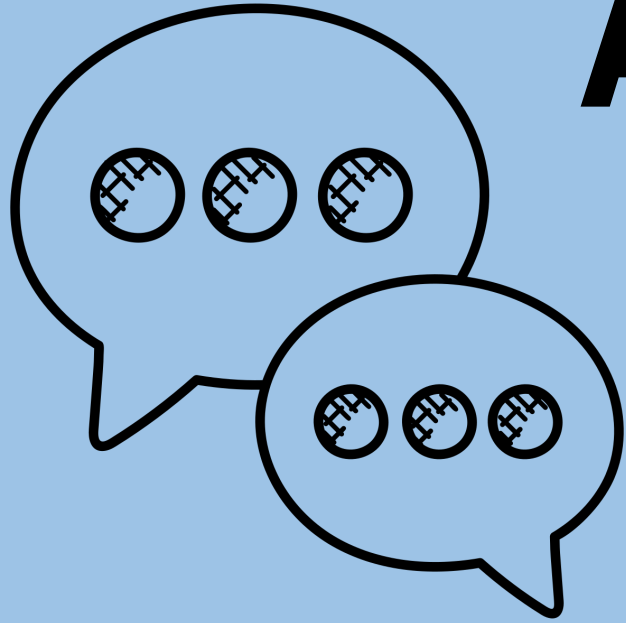


Request for Qualifications

Also, looking to identify individuals and organizations interested in working with the Data and Research Working Group to compile and summarize the background resources.

Please email: cbpr@pacific.edu
or for more info see the RFQ at: <https://bit.ly/NSJV-RFQ>



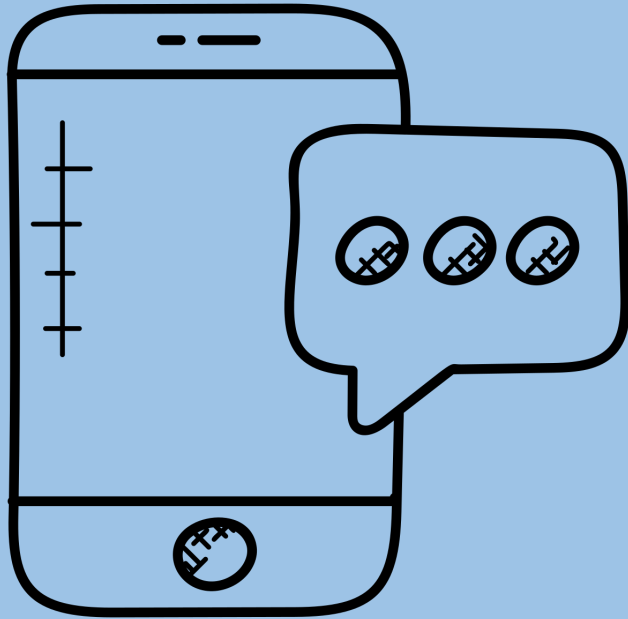


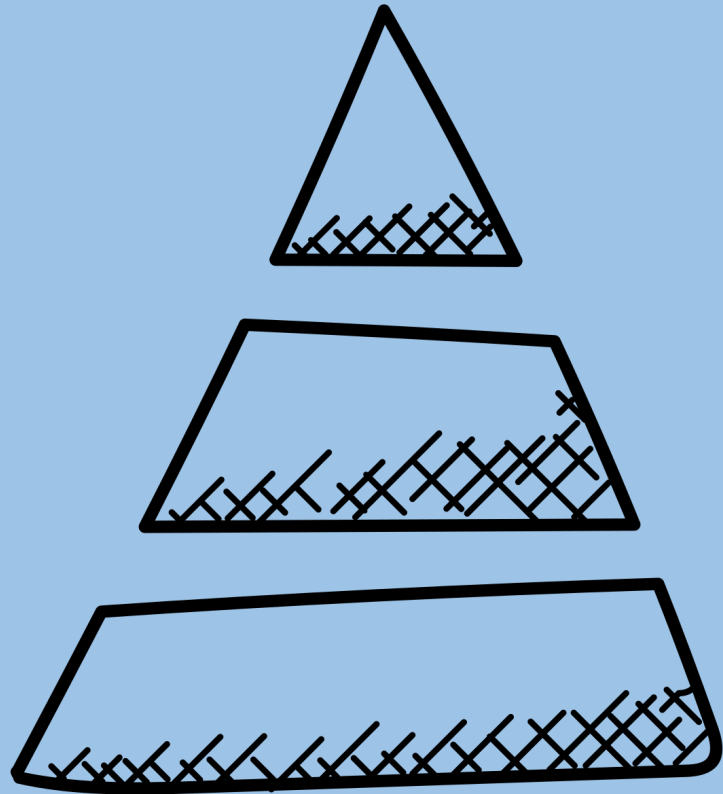
At Your Tables

Please track your thoughts on post-it notes and chart paper. One thought per post-it note.

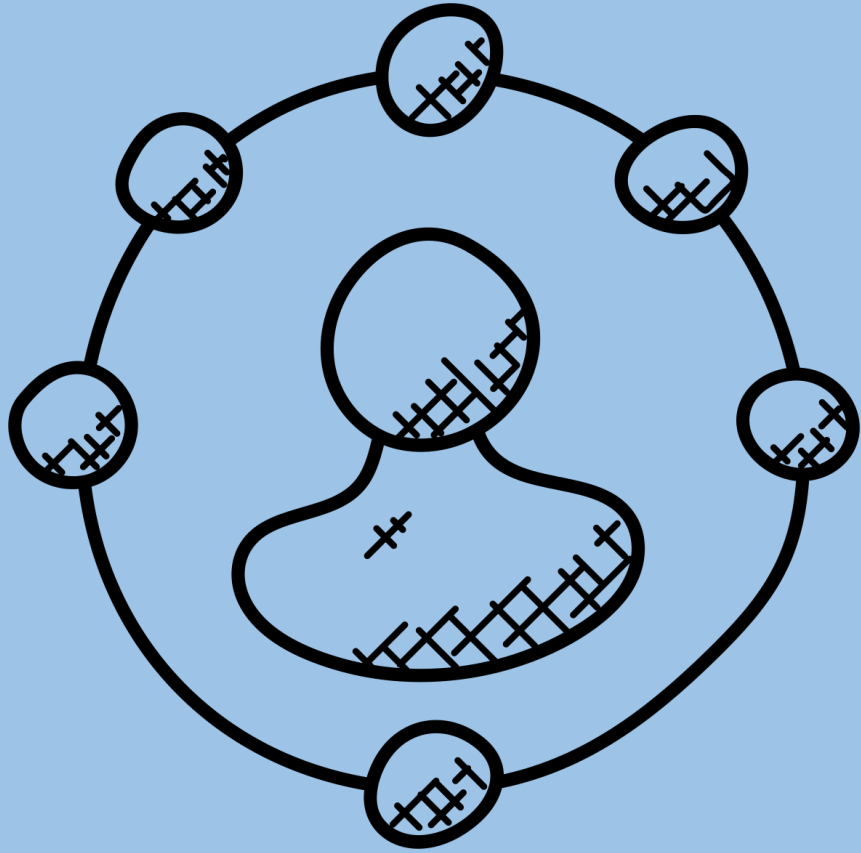
- What did you hear?
- What do you like?
- What concerns or questions do you have?

Strategy Area Logo Vote...

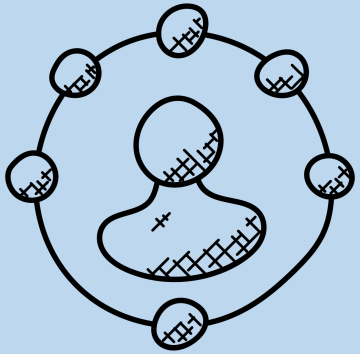




Re-grounding Ourselves in our Work



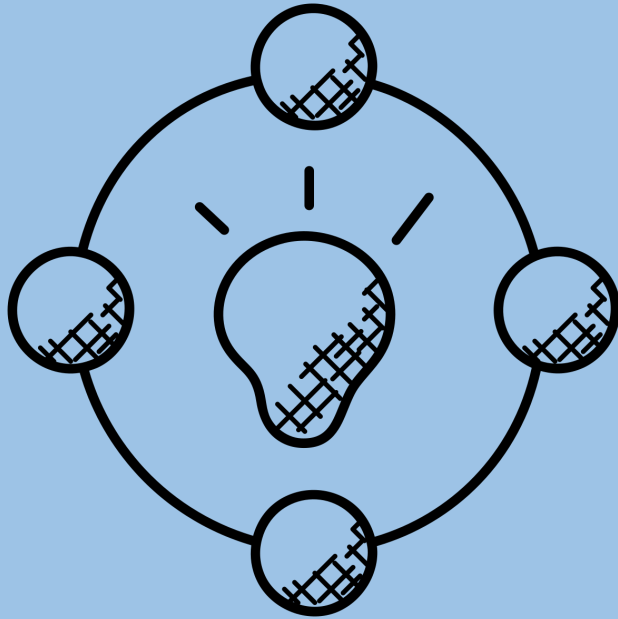
Stakeholder Mapping



Stakeholder Mapping

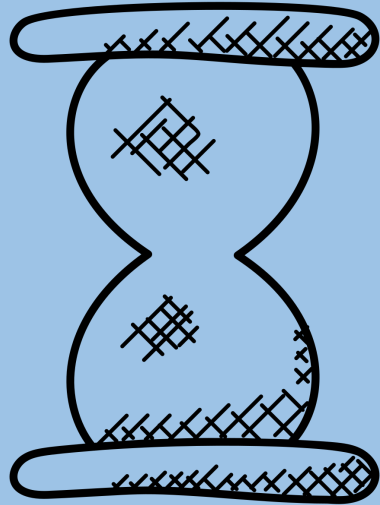
- County Coordinators will lead Stakeholder mapping exercise using a consistent, collaborative approach
- Will identify and map organizations, coalitions, strategic plans, and community networks
- Will engage stakeholders and prime them for Part 2 of the Planning Process
- Will engage by County, and then collectively by issue area across the three counties

Landscape Analysis

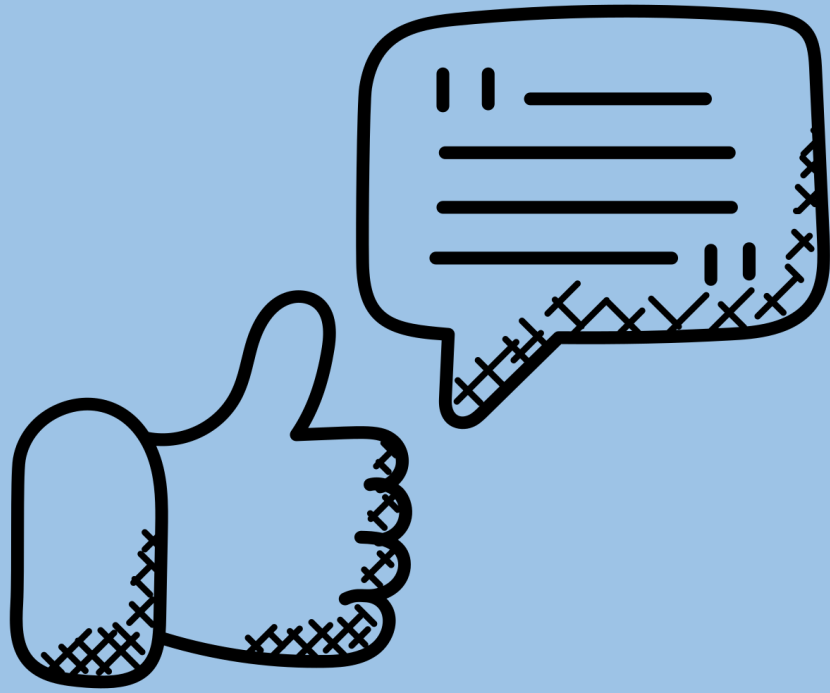


Please track your thoughts on post-it notes and chart paper.
One thought per post-it note.

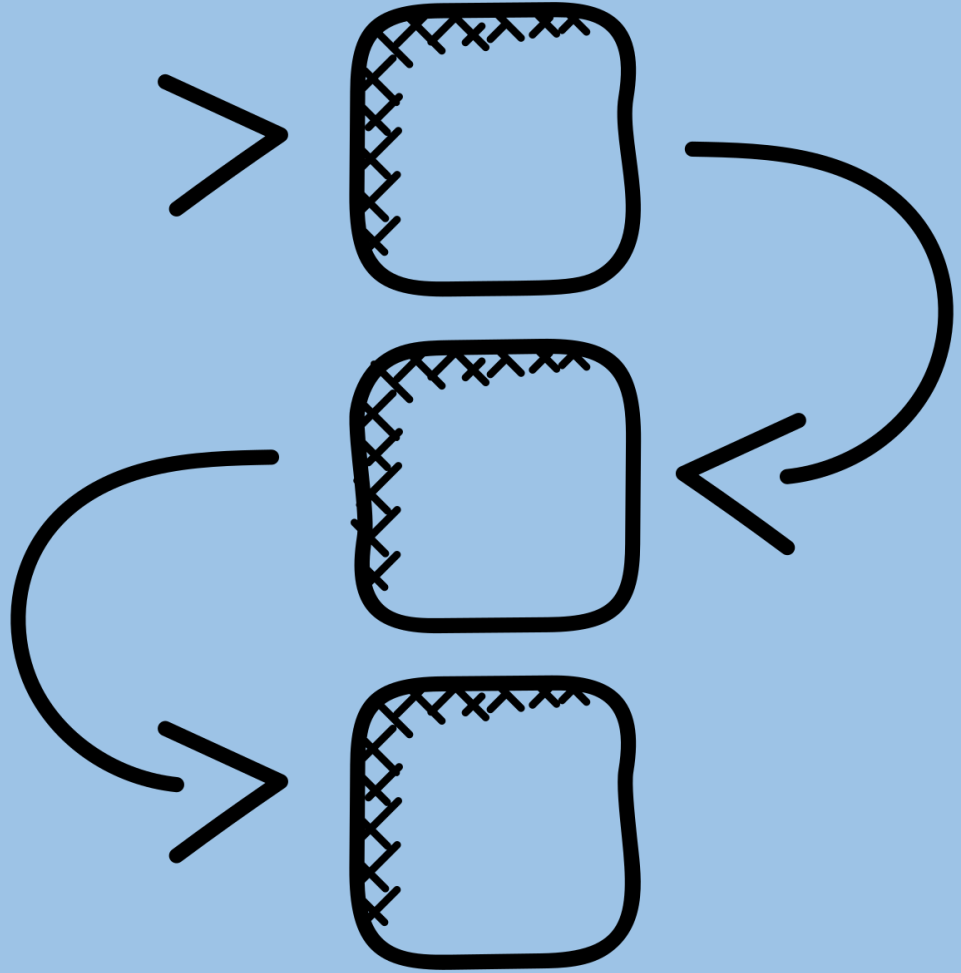
- What excites you?
- What questions do you have?
- How will we ensure community voice throughout the process?
- What do we need in order to fulfill the assignment of stakeholder mapping?
- What will support our progress towards our goals?
- What will impede progress?



Break



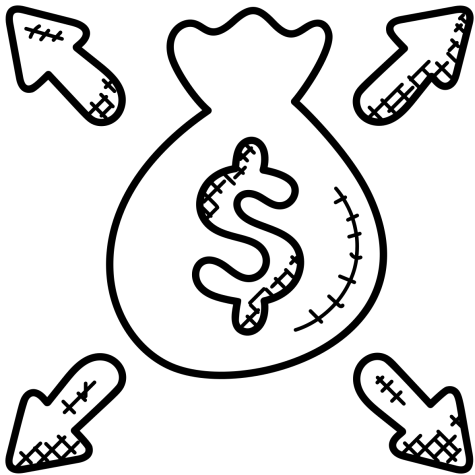
**Let's
Debrief**



**Next
Steps**

Next Steps

Funding Opportunities

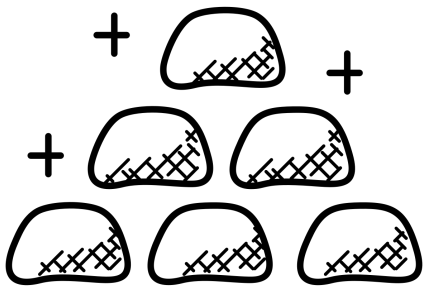


- **Community Partner Funding**, grants to fund CBOs to help amplify engagement efforts
- Funding to support engagement of business and industry
- **Investment in existing inclusive economic development** practices, in communities and cities across the region
- **Vendors and subcontractors** to help complete the Planning Phase activities
- Investments to help build sustainable networks and systems for collaboration across the region

Next Steps

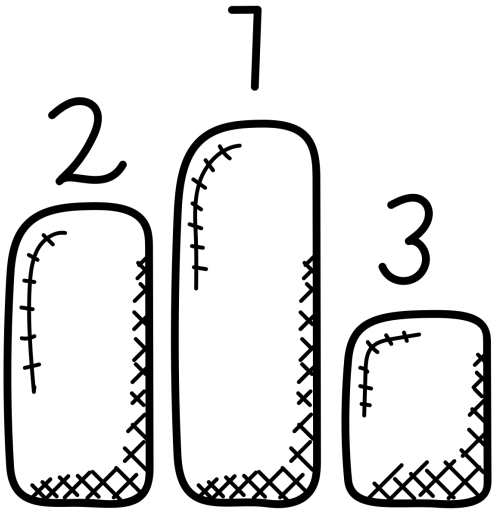
Budget Committee

- Budget Modification due June 14, 2023
- Allocate funding by category and support Planning activities and goals



Next Steps

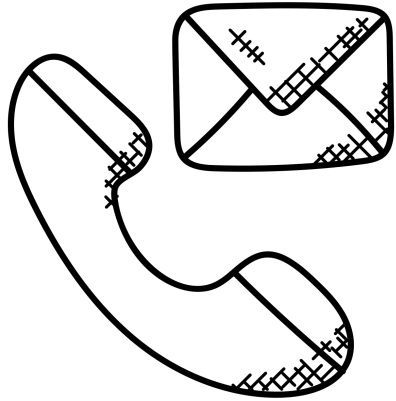
Governance



- Affirm HRTC membership categories and representation
- Develop application and process for HRTC
- Complete development of Inclusive Economic Development Learning Series
- Elect members to the HRTC

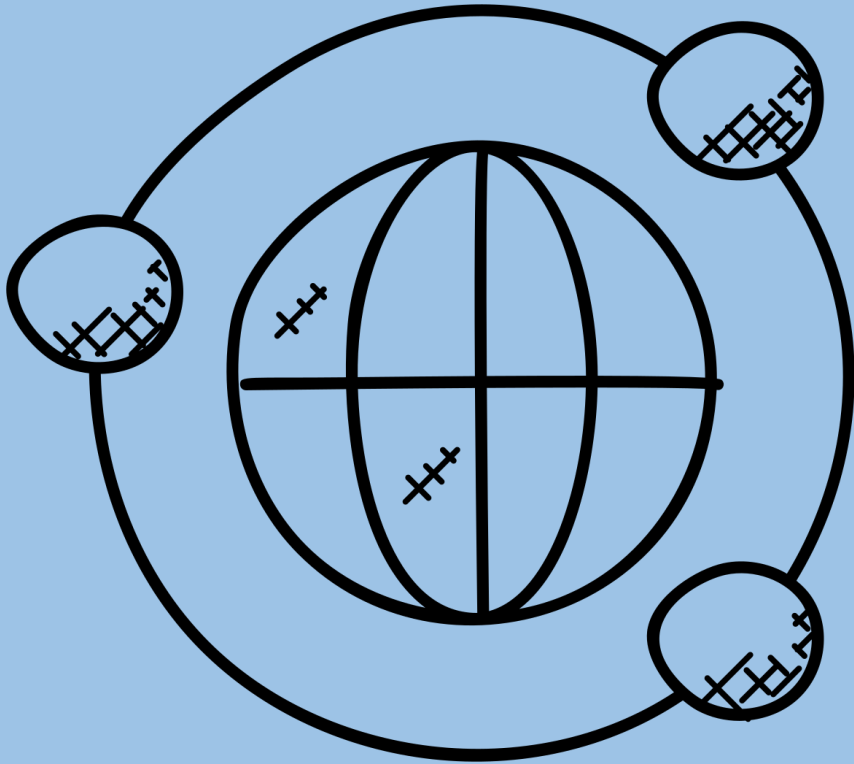
Next Steps

Outreach and Engagement Strategy



- Set up County Coordinators for deep, County-wide engagement
- Develop a multi-strategic effort to ensure all communities are heard and connected
- Set metrics and feedback loops for engagement

Closing Session



Changing large Systems - Inclusive Economic Development

- **The role of mental models**
- **A focus on strong relationships**