

Appendix A

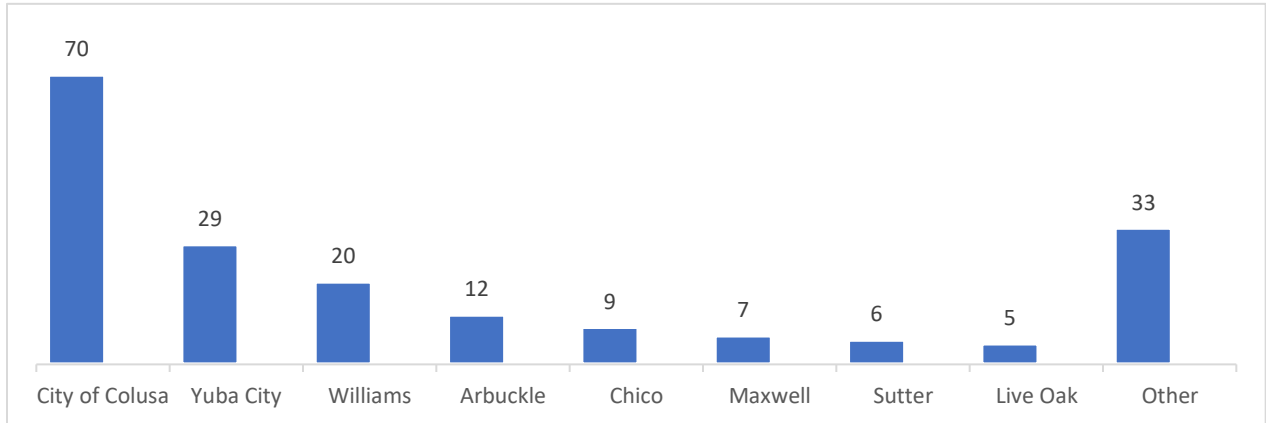
Appendix A – Public Engagement

The following community stakeholders participated in the construction of the Colusa County CEDS document by providing input via public meetings, personal interviews, and online surveys.

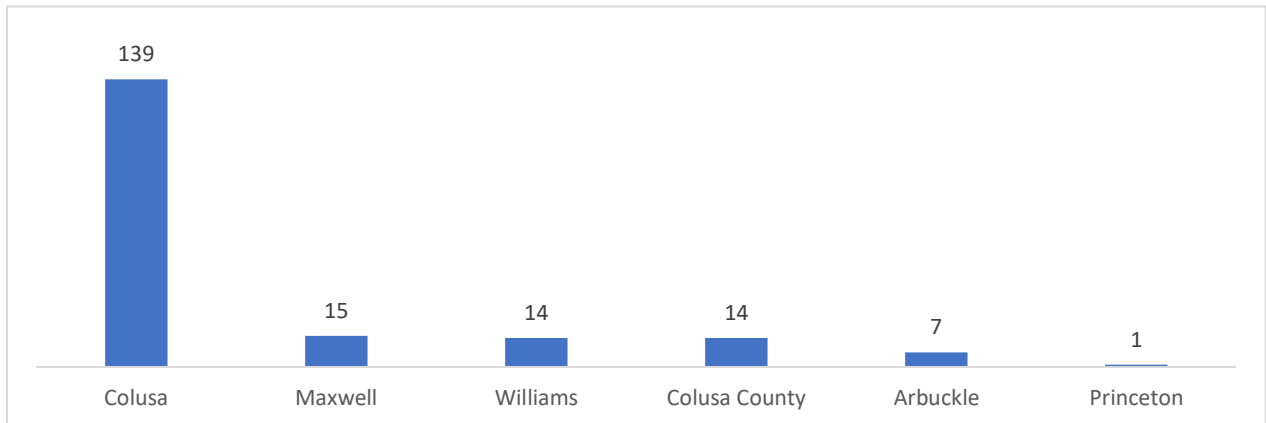
- Amanda Ragudo, Vice Chair, Colusa Indian Community Council
- Anastacia Allen, Colusa County
- Angie O’cañas Hernandez, Director, Colusa County OneStop
- Barbara Hayes, RCRC
- Bob Burris, RCRC
- Casey Hoifhenke, City of Willows
- Charlie Wright, Chair, Kletsel Dehe Band of Wintun Indians
- Daniel Vaca, City of Colusa
- Daurice Kalfsbeek Smith, Colusa County Supervisor, North Central Counties Consortium Board
- David Vodden, City of Willows
- Denise Carter, Colusa County resident
- Denise Conrado, City of Colusa Council
- Fernanda Vanetta, City of Colusa
- Frank Kennedy, City of Willows
- Franz Niederholzer, University of California Ag and Natural Resources
- Gary Evans, Colusa County
- Gary Hansen, City of Willows
- Greg Plucker, Colusa County Community Development Director
- Greg Ponciano, City of Colusa Council and Mayor
- Janice Bell, Colusa County
- Jeff Williams, City of Willows
- Jennifer Diaz, Director, Colusa County Chamber of Commerce
- Jesse Cain, City Manager, City of Colusa
- Jose Merced Corona, Colusa County
- Julie Garofalo, City of Colusa
- Justin Caporusso, Caporusso Communications
- Kate Dunlap, City of Williams Council
- Kent Boes, Colusa County Supervisor
- Lora Ceccon, Colusa County Partnership
- Marti Brown, City of Willows
- Michael Azevedo, Colusa County Public Works
- Michael West, Superintendent, Colusa County Office of Education
- Molly West, Tribal Administrator
- Richard Thomas, City of Willows
- Ryan Codorniz, City of Colusa
- Sophie Konuwa, Small Business Development Center
- Steve Geiger, Colusa County Planning Department
- Terrance Rodgers, RCRC
- Wayne Mitchum Jr., Chair, Colusa Indian Community Council
- Wendy Tyler, Colusa County CAO
- Susan Meeker, Colusa County News
- 16 community stakeholders who subscribed to the project website with their email address only, and
- 417 residents and workers who participated in the online surveys

Worker Survey Results (191)

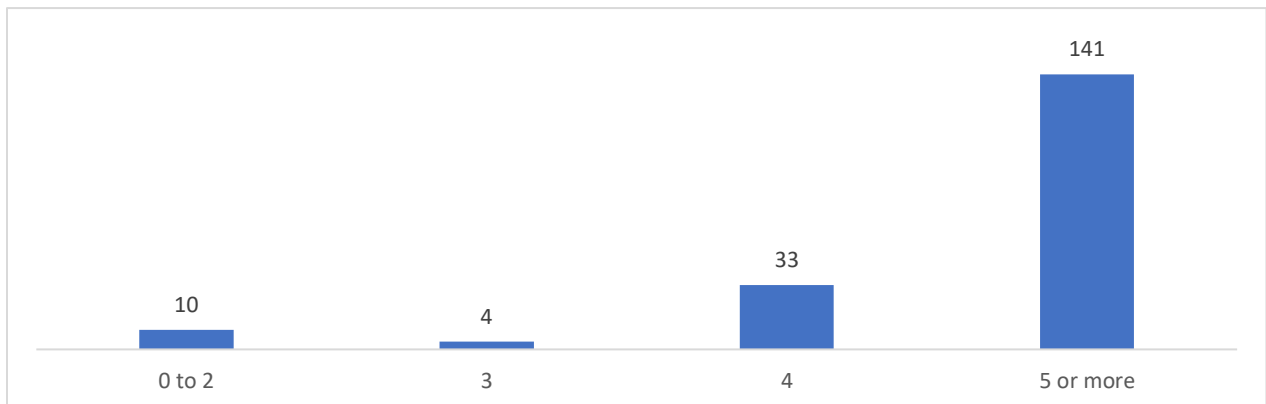
1. In what city/community do you live? ("other" communities include Willows, Woodland, Meridian, Orland, Oroville, Gridley, Princeton, Corning, Davis, Dunnigan, Durham, Grimes, Los Molinos, Natomas, and Sacramento)



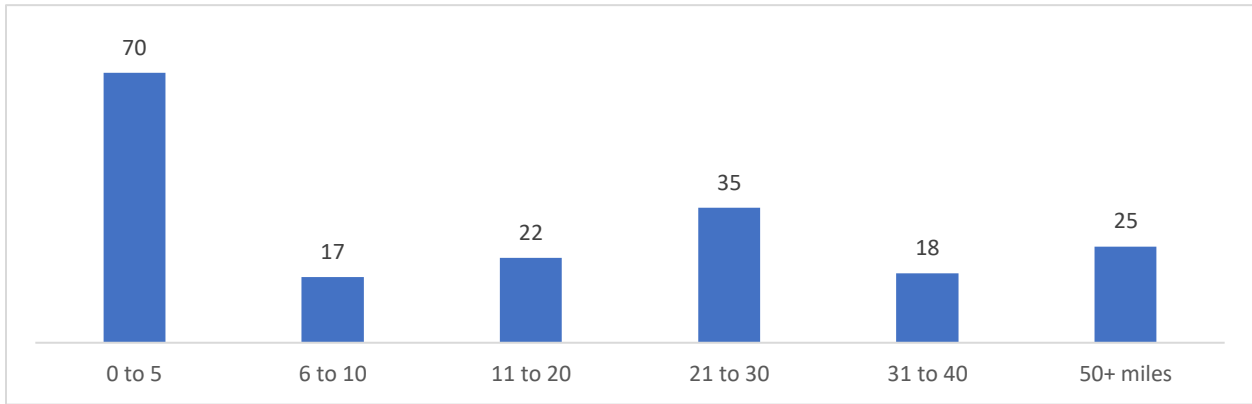
2. In what city/community are you employed?



3. How many days a week do you commute from home to work?



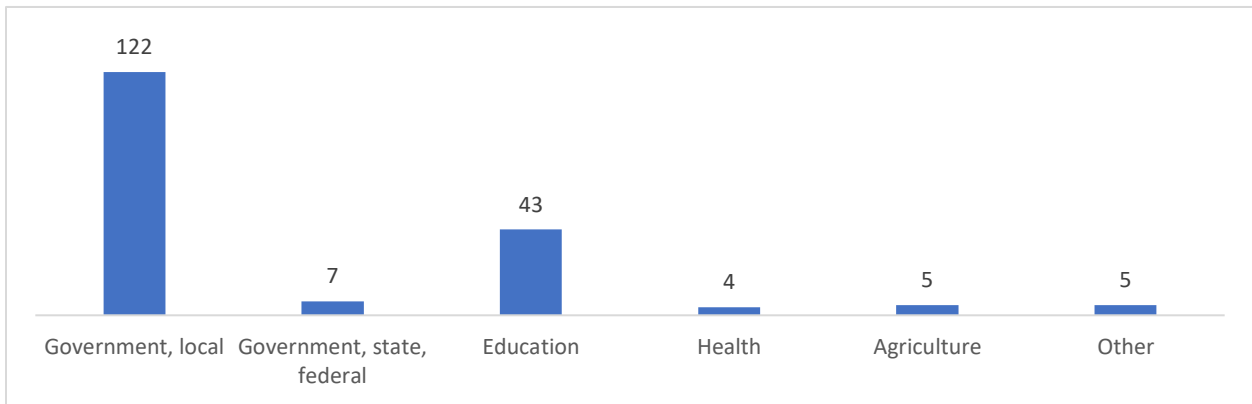
4. How many miles do you commute from home to work (one-way)?



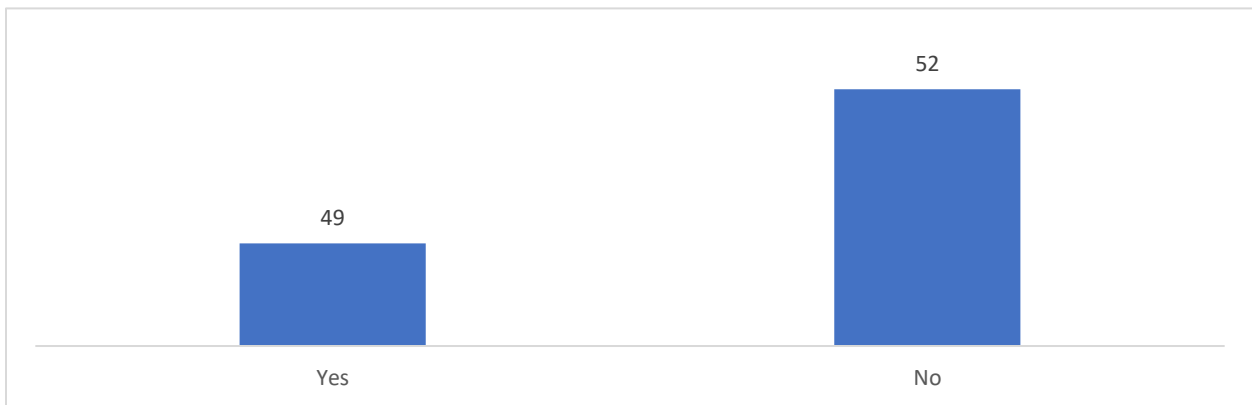
5. How many days a week do you work remotely?

Seven percent of respondents indicated they work remotely anywhere from one to five days; varied and as needed were additional responses.

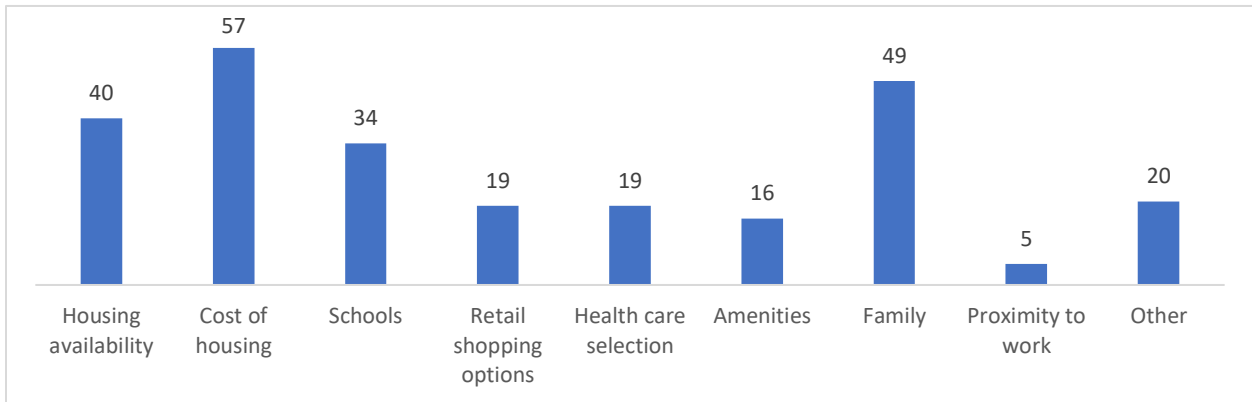
6. In what industry is your employer?



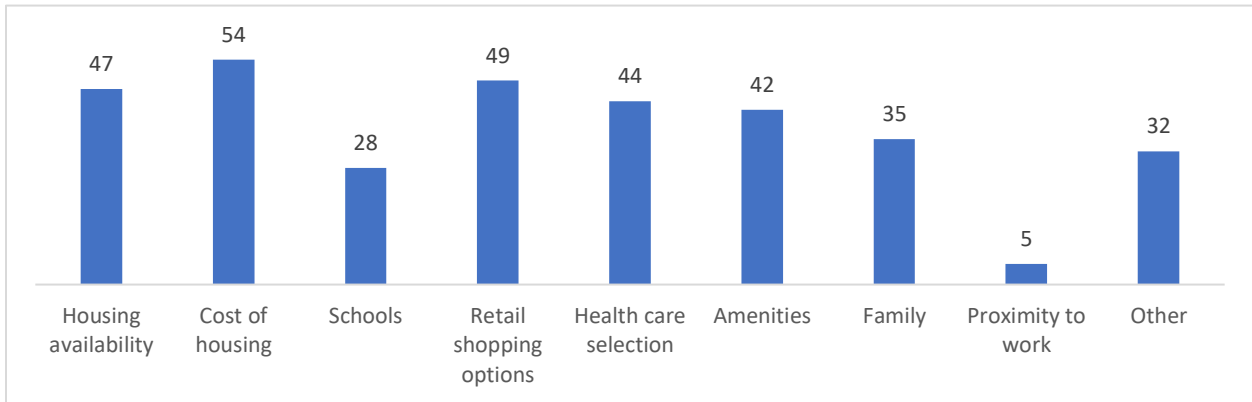
7. If you do not currently live in Colusa County, have you, or would you, ever consider making Colusa County your home?



8. What are the primary factors that you considered when thinking of making Colusa County your home?

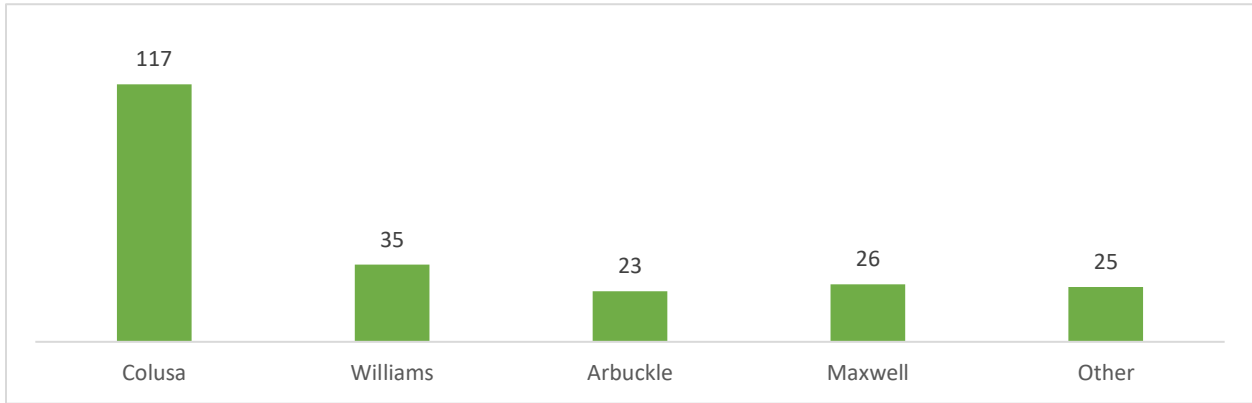


9. What are the primary factors preventing you from making Colusa County your home?



Resident Survey Results (226)

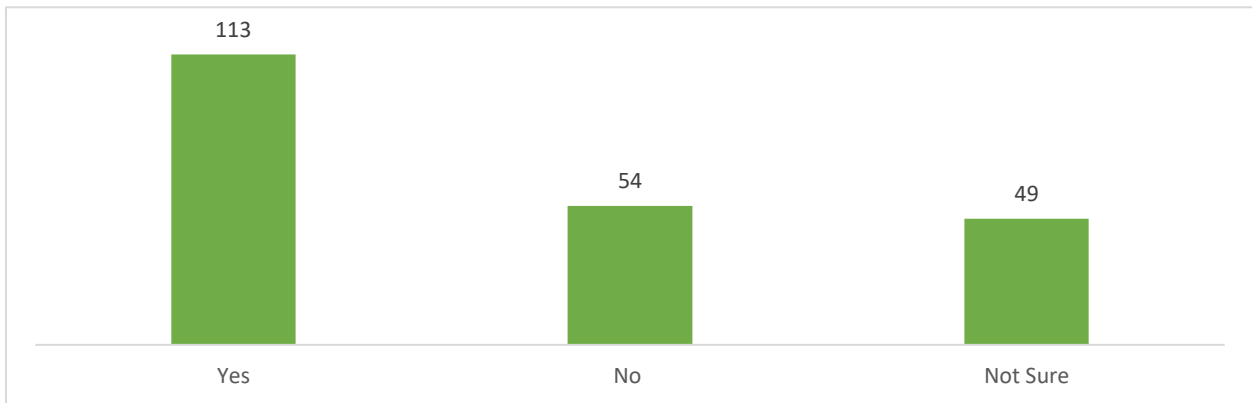
1. Where do you live?



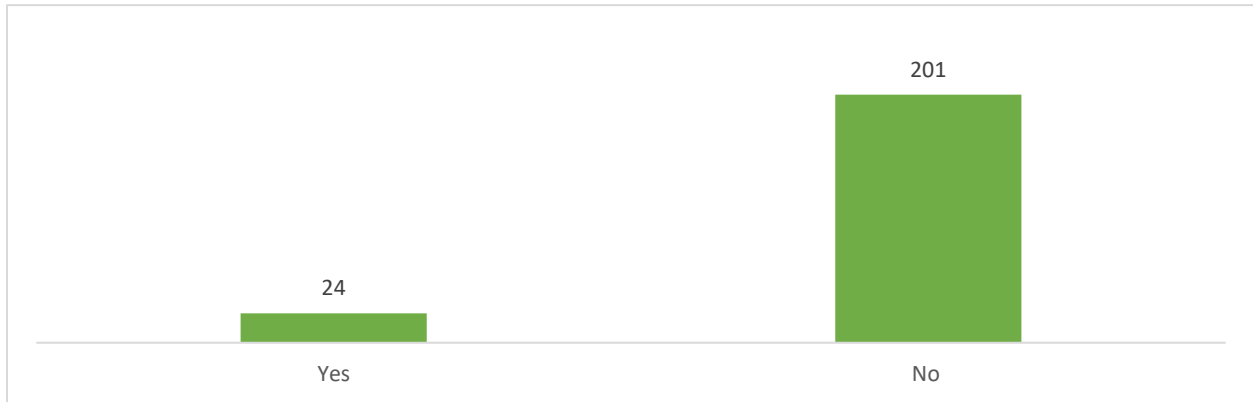
2. Which statement(s) best describes your current employment situation?



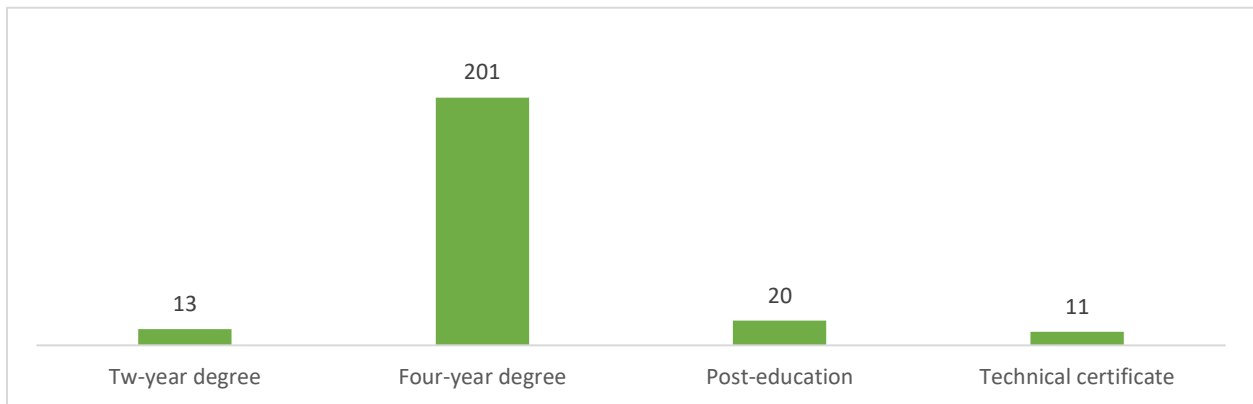
3. Do you have work experience or special training that qualifies you for a better-paying job than the one you currently have?



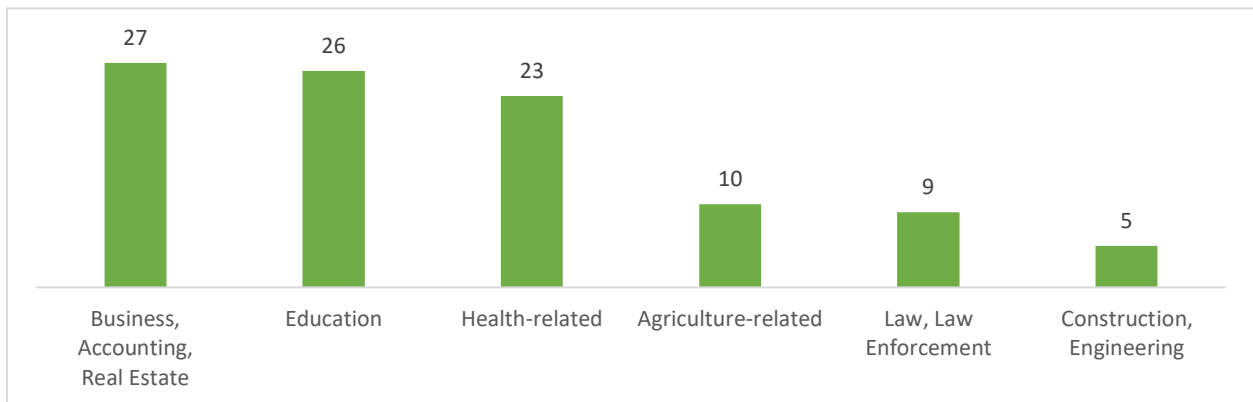
4. Are you currently going to school or in training for a degree or certificate?



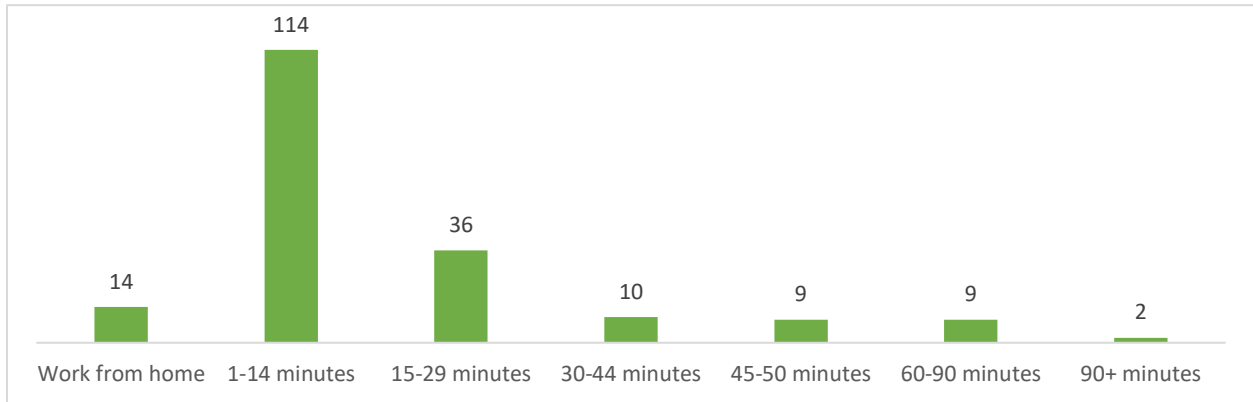
5. If yes, which of the following best describes your course of study?



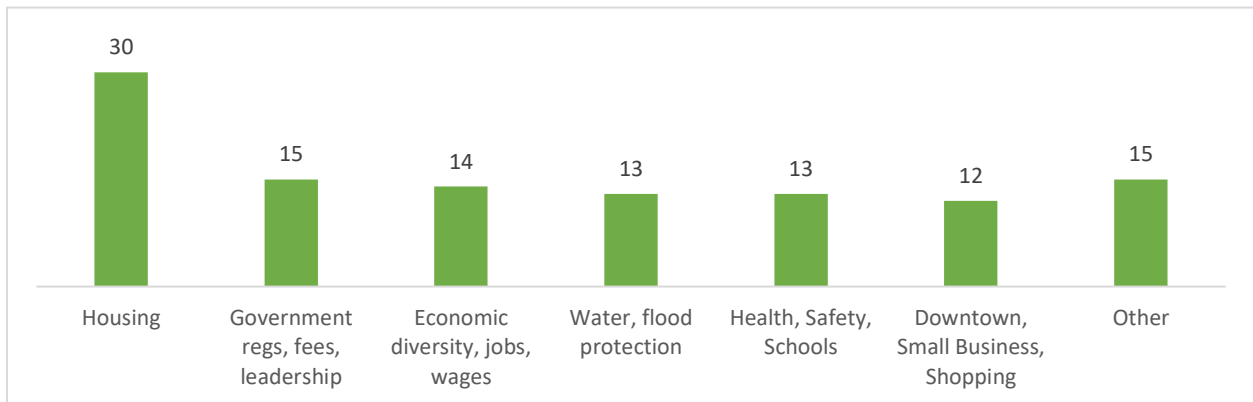
6. What industry or skill is the focus of your studies?



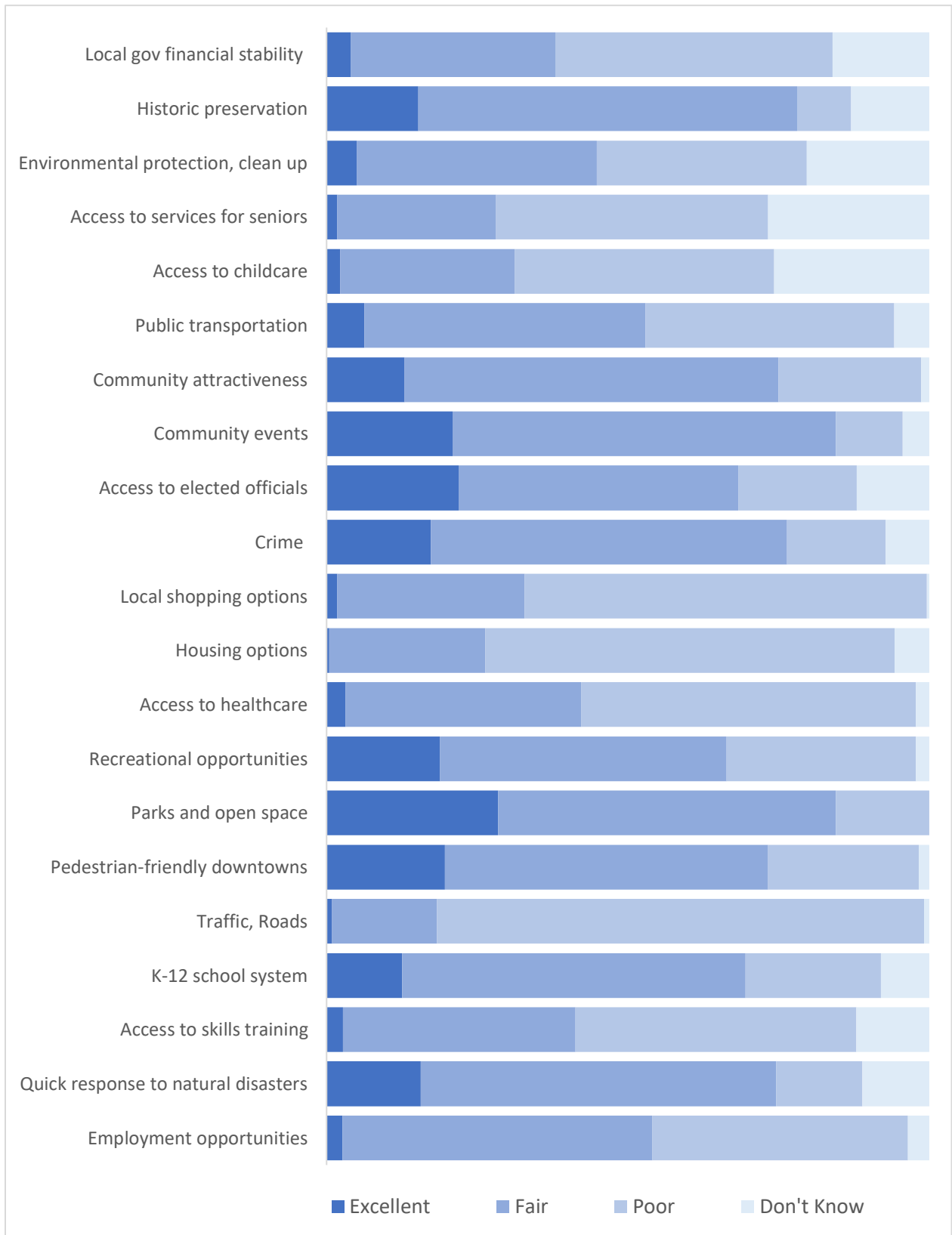
7. If you are employed, how long is your one-way commute to work?



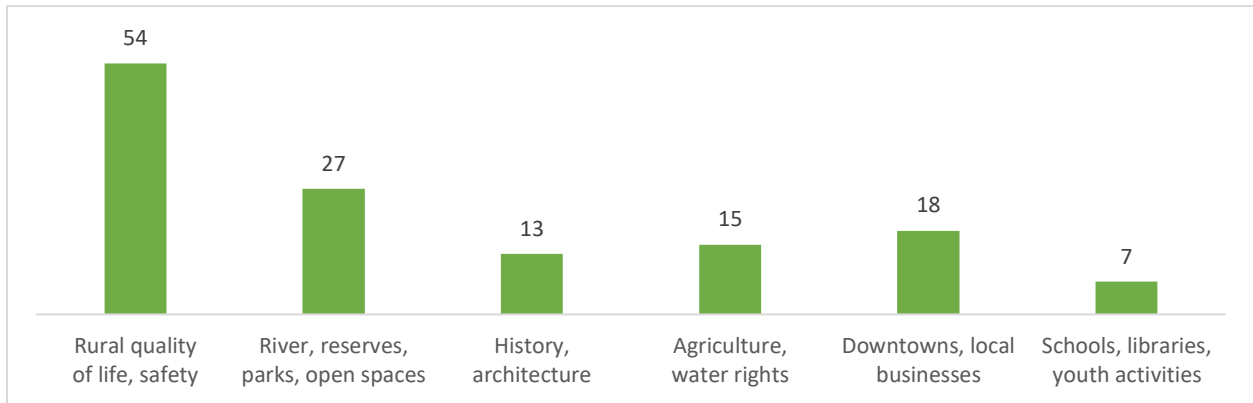
8. What is the most critical problem or challenge that needs to be addressed to ensure economic prosperity in Colusa County?



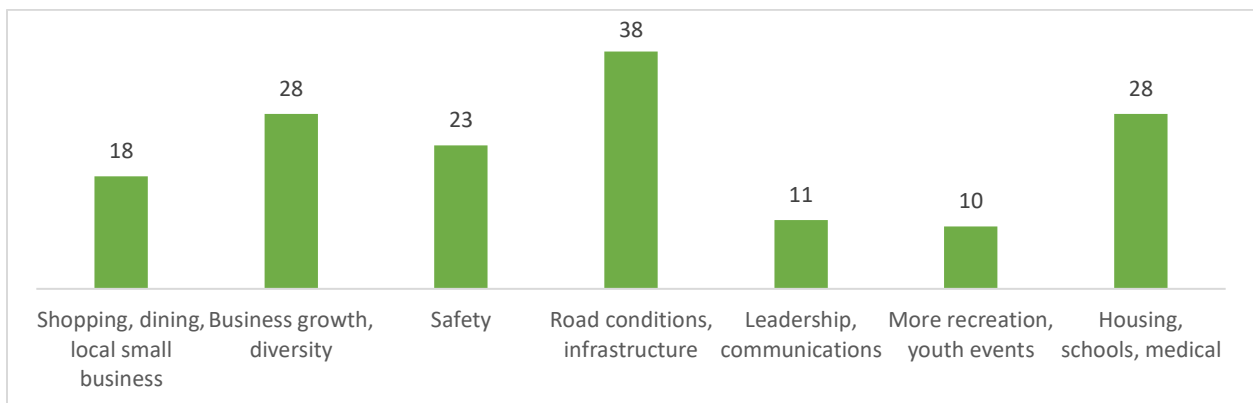
9. Rate Colusa County on the following factors.



10. If you could protect one thing—a quality, an establishment, or an amenity—in Colusa County, what is it?



11. If you could change one thing about Colusa County, what is it and why?



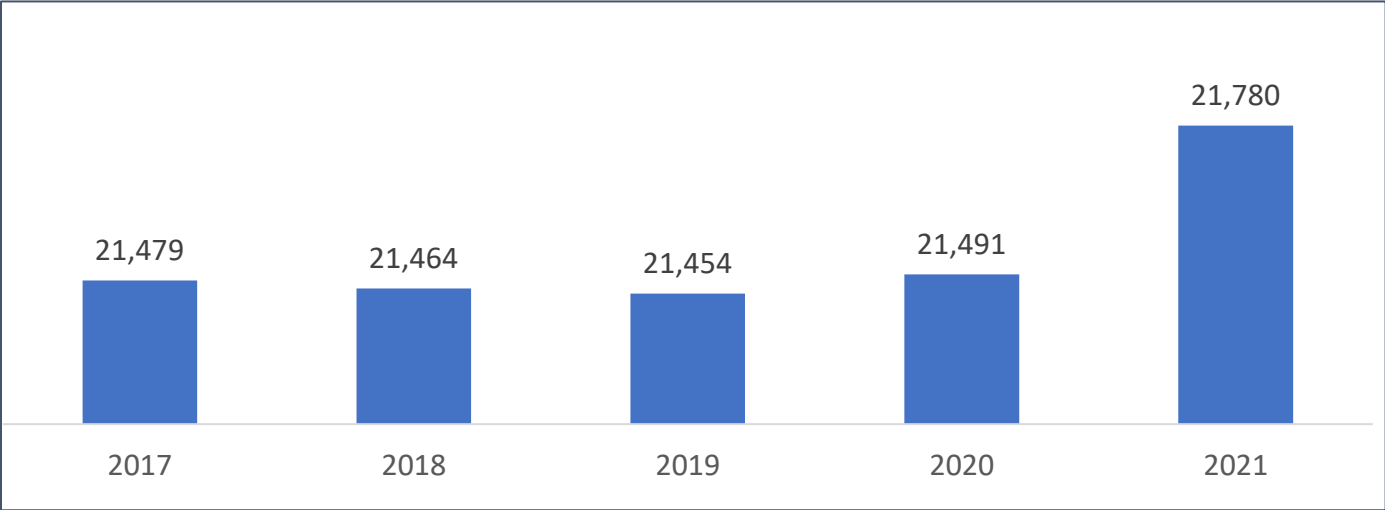
Appendix B

Appendix B - Economic Conditions Data

This document provides the detailed demographic and economic data in support of the CEDS strategy document. The data were obtained from state and national sources, as noted. Analysis was provided by Dr. Robert Eyler, president and founder of Economic Forensics & Analytics, Inc.

Colusa County Population Growth

Source: US Census Bureau, ACS 5-Year Estimates, Table DP05



Until 2020 population growth in Colusa County has been flat. A small (13%) population increase was realized in 2021. A contributing factor may be the COVID-induced exodus from populated cities to more rural areas.

Colusa County Population Diversity

Source: US Census Bureau, 2021 ACS 5-Year Estimates

Population by Sex		Population by Age		Population by Ethnicity		Population by Race	
Male	51.2%	Under 19 y/o	30.0%	Hispanic or Latino	62.0%	One race	80.0%
Female	48.8%	20 to 64 y/o	55.5%	Not Hispanic or Latino	38.0%	Two or more races	19.5%
		Over 65 y/o	14.5%			Three or more races	0.5%

The term diversity refers to all the ways in which people differ -- race, ethnicity, gender, age. A diverse population is one with a range of people of various ages, racial, ethnic, socioeconomic and cultural backgrounds.

Race is biological and often describes individuals' physical traits (White, Black or African American, Asian, American Indian, etc.)

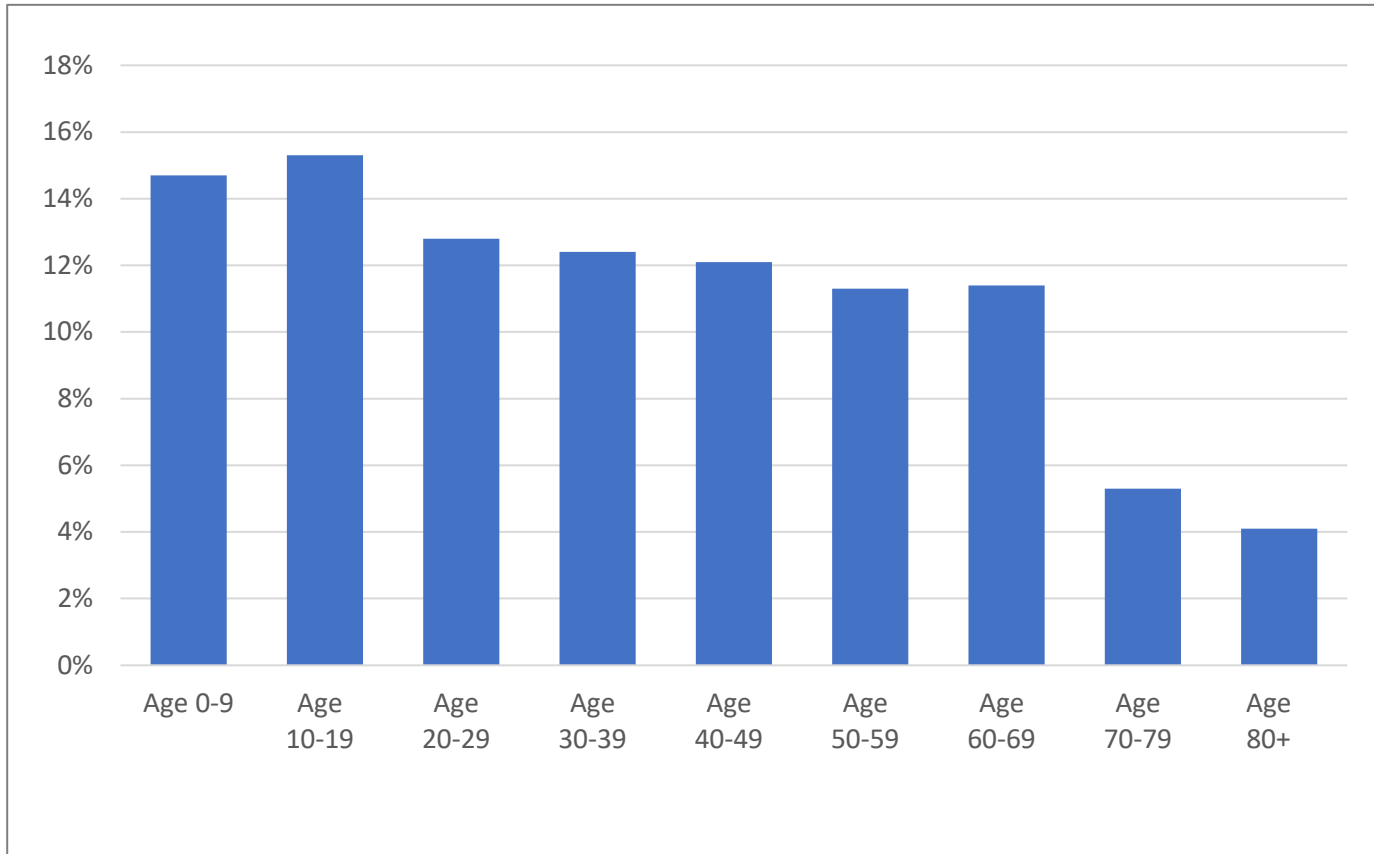
Ethnicity is broader than race and is one's cultural identify (national origin, tribal heritage, religion, language, etc.)

Colusa County's diversity is higher when looking at population ethnicity, 62% identify as Hispanic or Latino.

Racial diversity in Colusa County is low. The majority of those identifying as one race, identify as white.

Colusa County Population Age Distribution

Source: US Census Bureau, 2021 ACS 5-Year Estimates, Table S0101

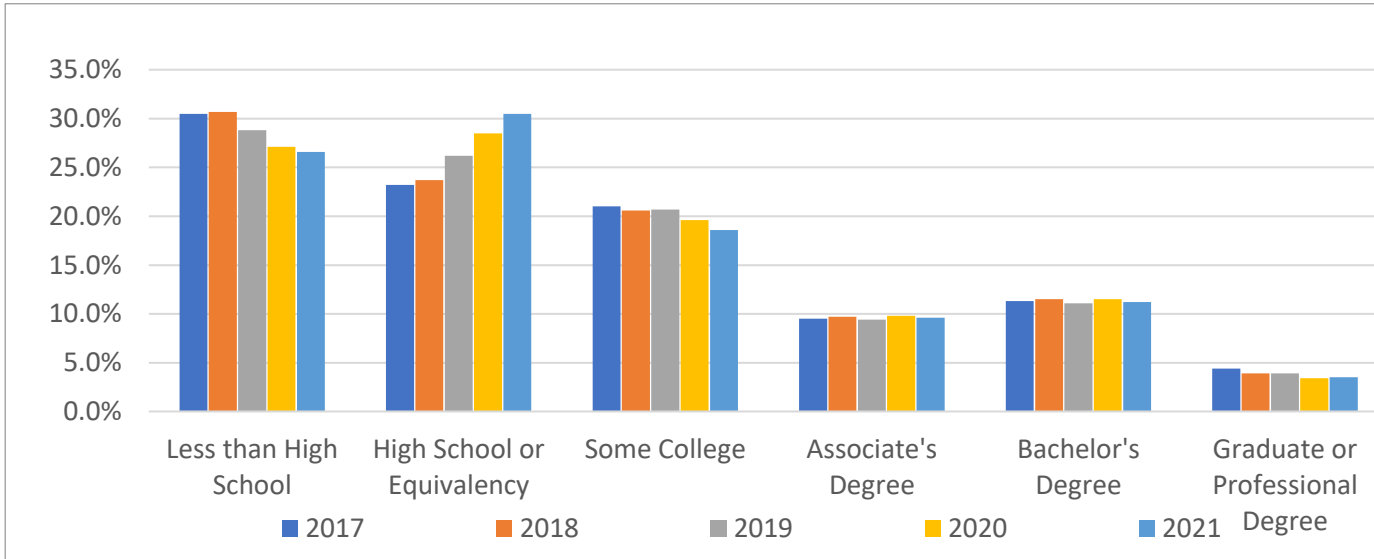


Population age is evenly distributed except for the older population age groups which can be expected. There is a slightly larger percentage of the population in the younger age groups (0 to 19 years). This population sector represents the incoming workforce. However, as will be shown later there is no growth in those age groups.

The median age has been increasing, from 34.7 years in 2017 to 35.6 years in 2021. However, the county's median age is younger than statewide (37 years).

Educational Attainment, Population Age 25+

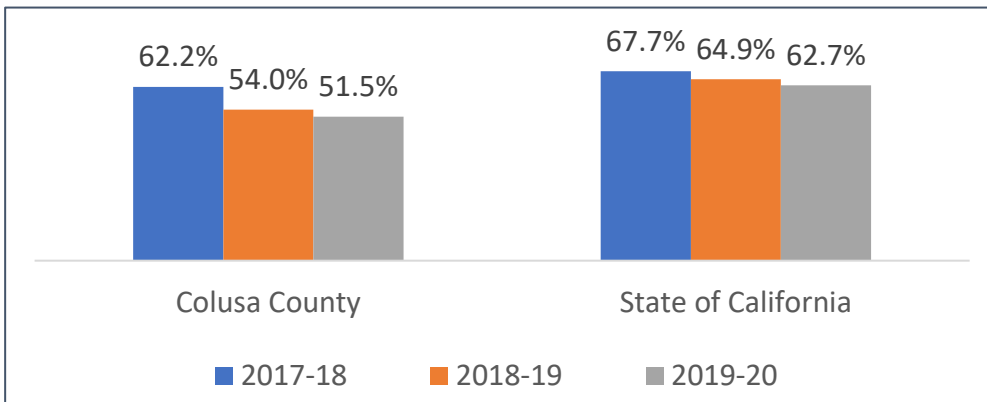
Source: US Census Bureau, ACS 5-Year Estimates, Table S1501



The share of the population with at least a high school degree or equivalent is improving and the share of the population with less than a high school education is declining. There is not yet an equivalent increase in the share of the population completing higher education. Growth in two or more years of continuing education is flat.

High School Completers Enrolled in College

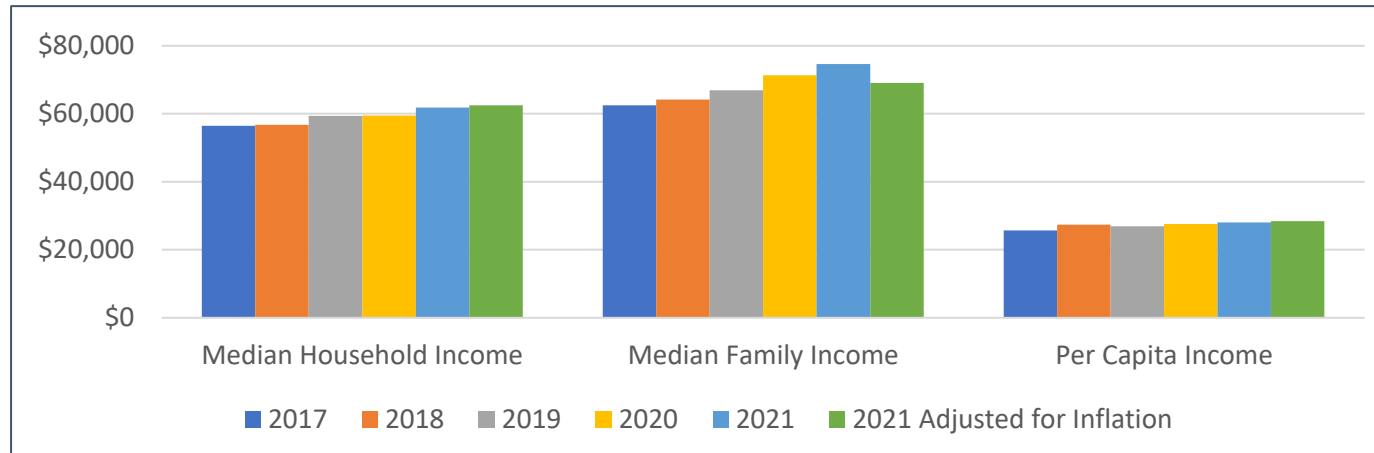
Source: California Department of Education (www.caschooldashboard.org/)



The number and percentage of Colusa County high school completers who are enrolling in college is slowly declining, which is in step with statewide data.

Income

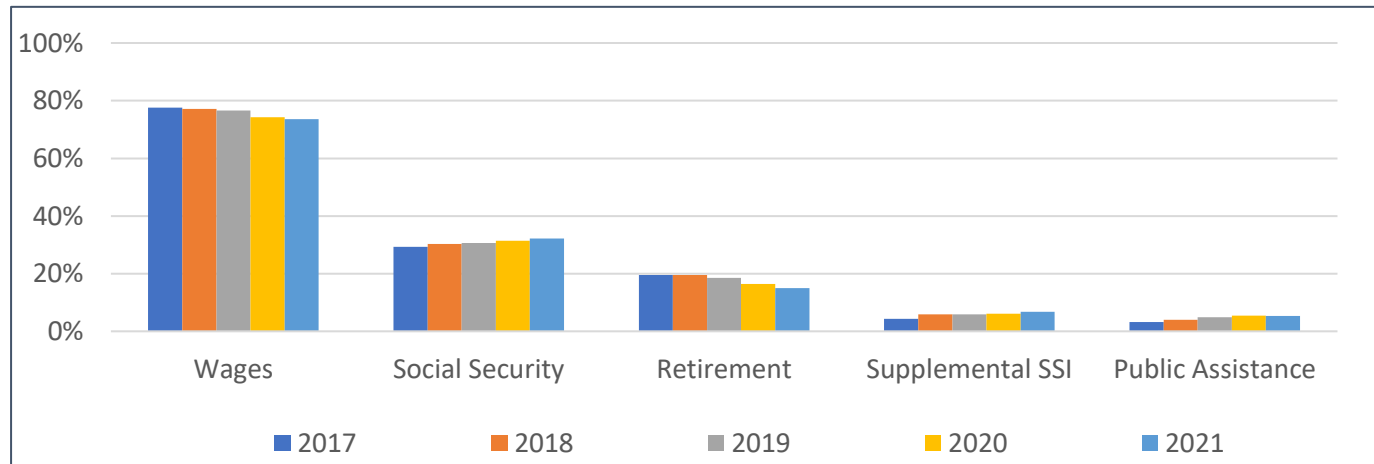
Source: US Census Bureau, ACS 5-Year Estimates, Table DP03); Inflation calculation per Federal Reserve Bank of Minneapolis Inflation Calculator



Income growth has been slow from 2017 to 2021. Household and per capita incomes kept pace with inflation, but the level of family income did not. This could be attributed to 1) households going from two incomes to one, 2) new families that formed or came to Colusa with less income, 3) new households moving to the county that have higher incomes as they moved from Sacramento, for example). Unfortunately, the share of families living in poverty remains steady at just over 10% each year from 2017 to 2021.

Sources of Income

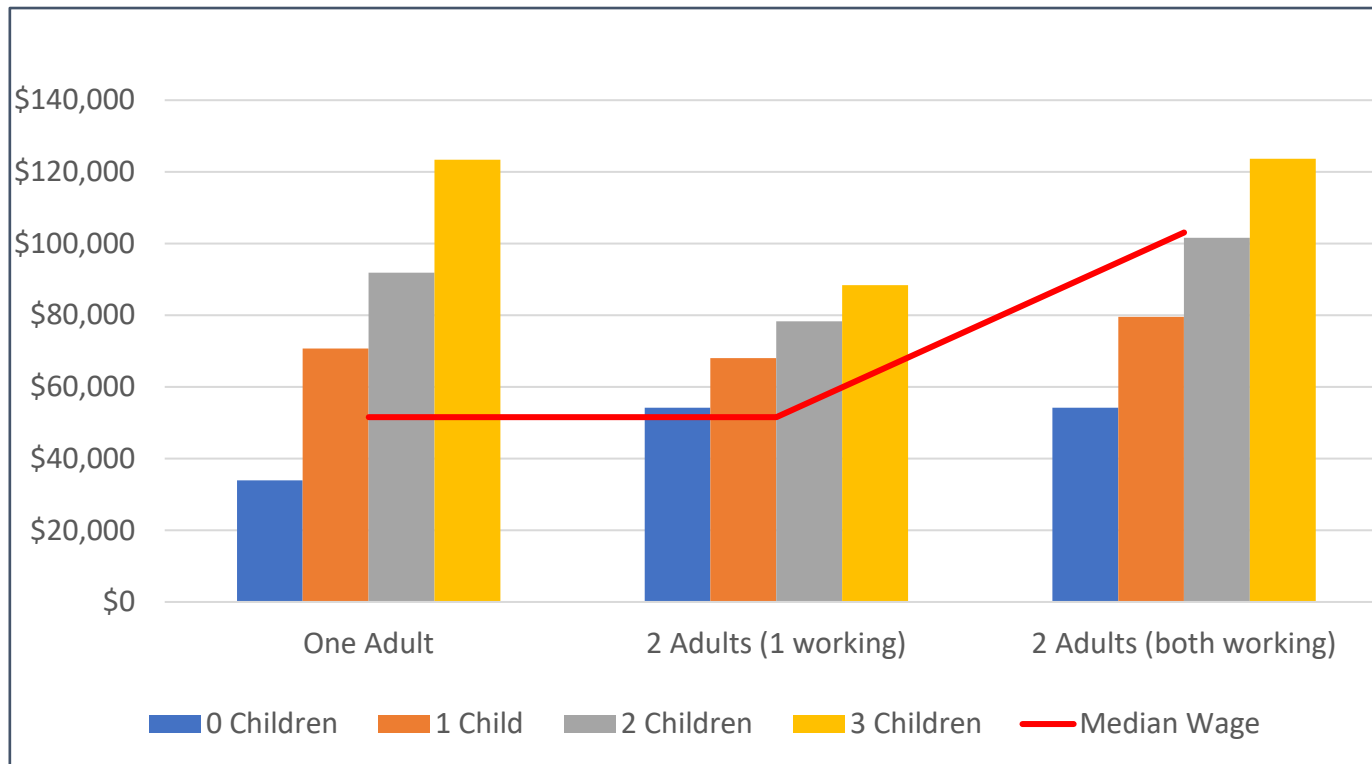
Source: US Census Bureau, ACS 5-Year Estimates, Table DP03



When examining sources of income in Colusa County one sees a disturbing trend in that the share of income from earned wages declined by four percentage points from 2017 to 2021 while the share of the population relying on Social Security, supplemental and public assistance increased.

Living Wage in Colusa County

Source: Massachusetts Institute of Technology Department of Urban Studies and Planning, Living Wage Calculator, 2022-2023, <https://livingwage.mit.edu/>



The median wage shown on the chart (\$51,533) represents wages for one or two persons employed in typically non-professional occupations (e.g., law, medical, IT, architecture, engineering, etc.). Occupations included are business operations, education, construction, social services, maintenance and repair, protective services, office and admin support, production, transportation, sales, food prep and serving, and healthcare support.

The living wage in Colusa County is shown as the required annual income before taxes that an individual in a household must earn to support his or herself and their family. The assumption is the sole provider is working full-time (2080 hours per year).

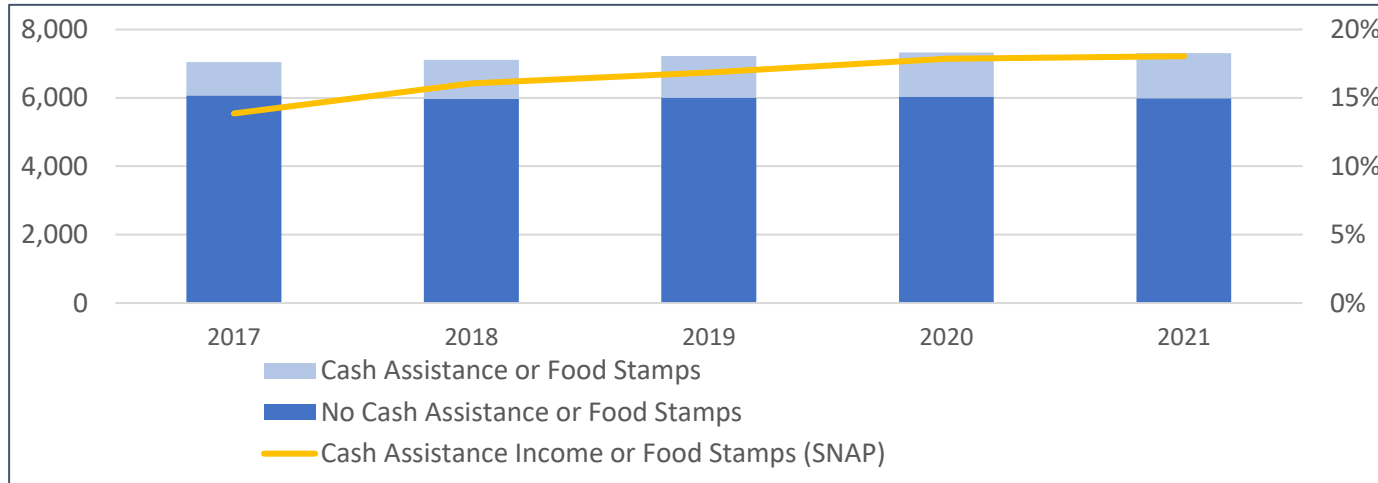
In the case of households with two working adults, all values are per working adult.

The estimated living wage required is based on individual living expenses such as:

- Food and Housing
- Childcare
- Medical care
- Transportation
- Other necessities e.g., clothing, personal care, housekeeping, broadband, pets, entertainment

Households Receiving Assistance

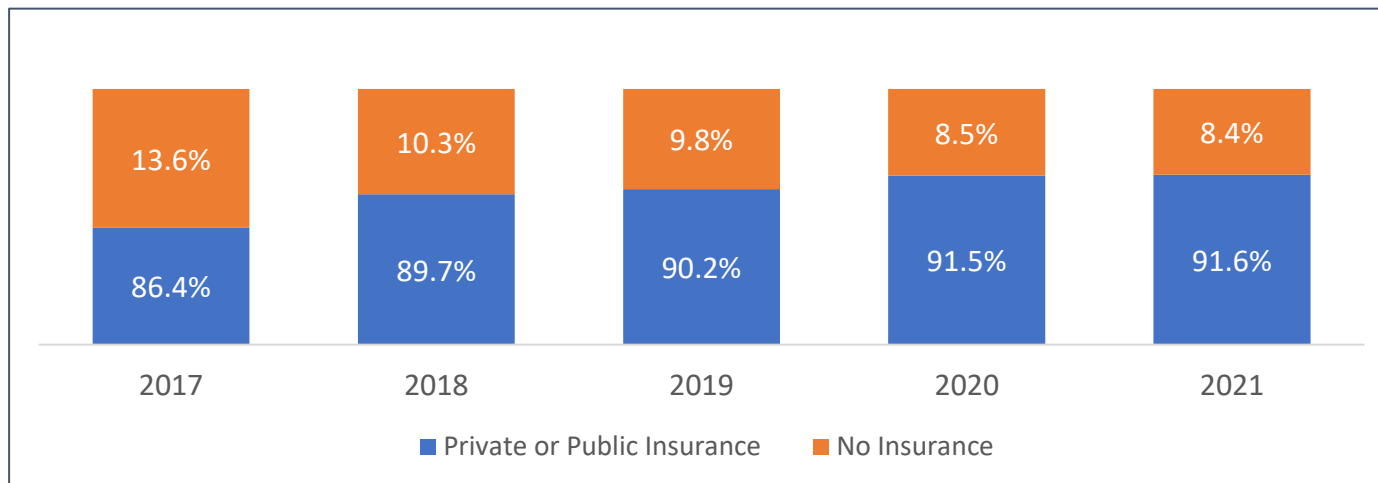
Source: US Census Bureau, ACS 5-Year Estimates, Table B19058



Looking closer at the population receiving public assistance, the number of households in Colusa County has remained consistent at about 6,000. However, the share of those households receiving cash assistance or food stamps has steadily increased, from a low of 14% in 2017 to 18% in 2021. There are 340 more households on public assistance in 2021 than in 2017.

Health Insurance Coverage (Civilian Population)

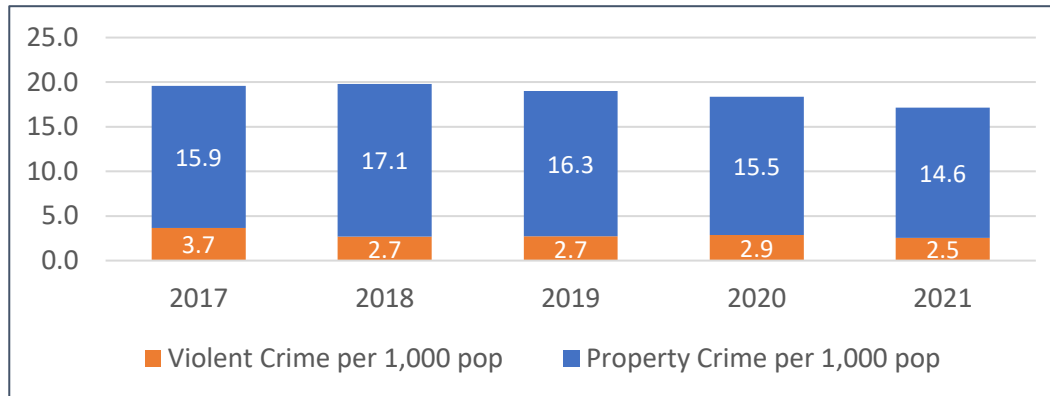
Source: US Census Bureau, American Community Survey 5-Year Estimates Table DP03



The share of the county's population with some type of health insurance coverage has improved yet it is still below the state's 93 percent.

Crime

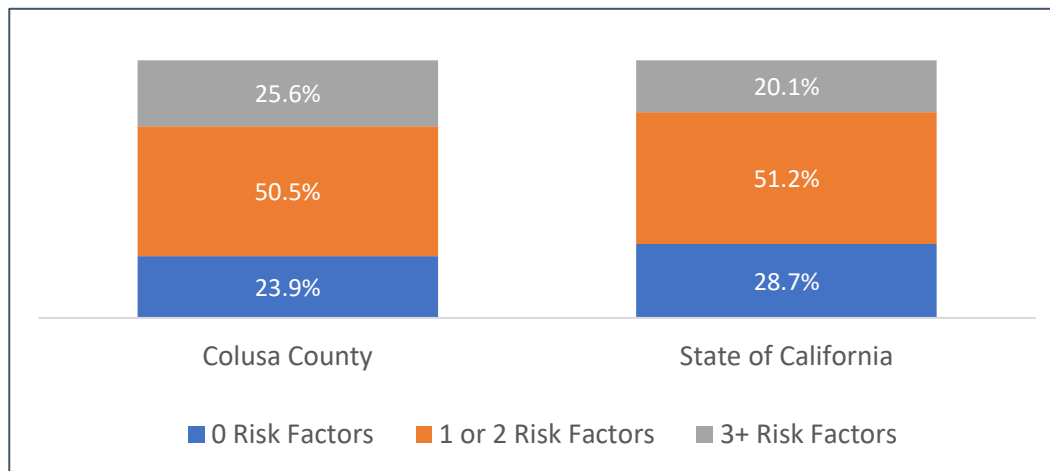
Source: California Department of Justice, Office of the Attorney General



Violent and property crime are on the decline in Colusa County both in real numbers and as a per population rate.

At-Risk Population

Source: US Census Bureau, 2019 Community Resiliency Estimates for Equity and Disaster

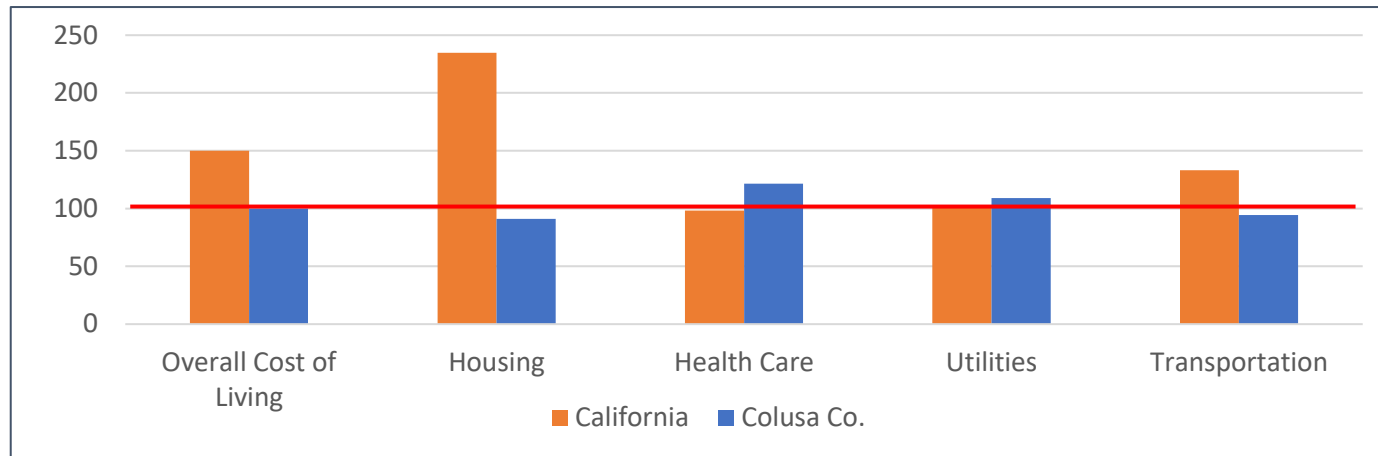


The Census Bureau's Community Resiliency Estimates (CRE) metric measures how at-risk communities are to the impact of various risk factors including:

- Living below poverty level
- No vehicle access
- No health insurance
- No broadband access
- Single or no caregiver households
- Language barriers
- HH reliant on seasonal employment
- HH with age 65+ living alone
- HH with disability

Cost of Living Index

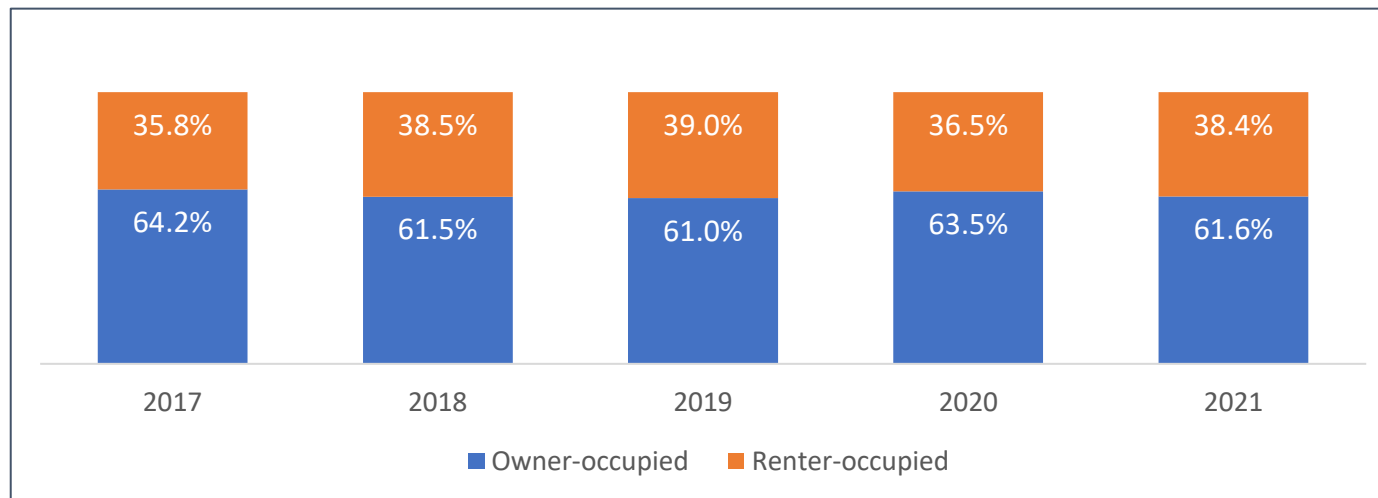
Source: Sperling's Best Places, August 2021



As can be expected, the cost of living in Colusa County is more affordable than statewide. Two exceptions are health care and utilities.

Home Ownership

Source: US Census Bureau, ACS 5-Year Estimates, Table DP04

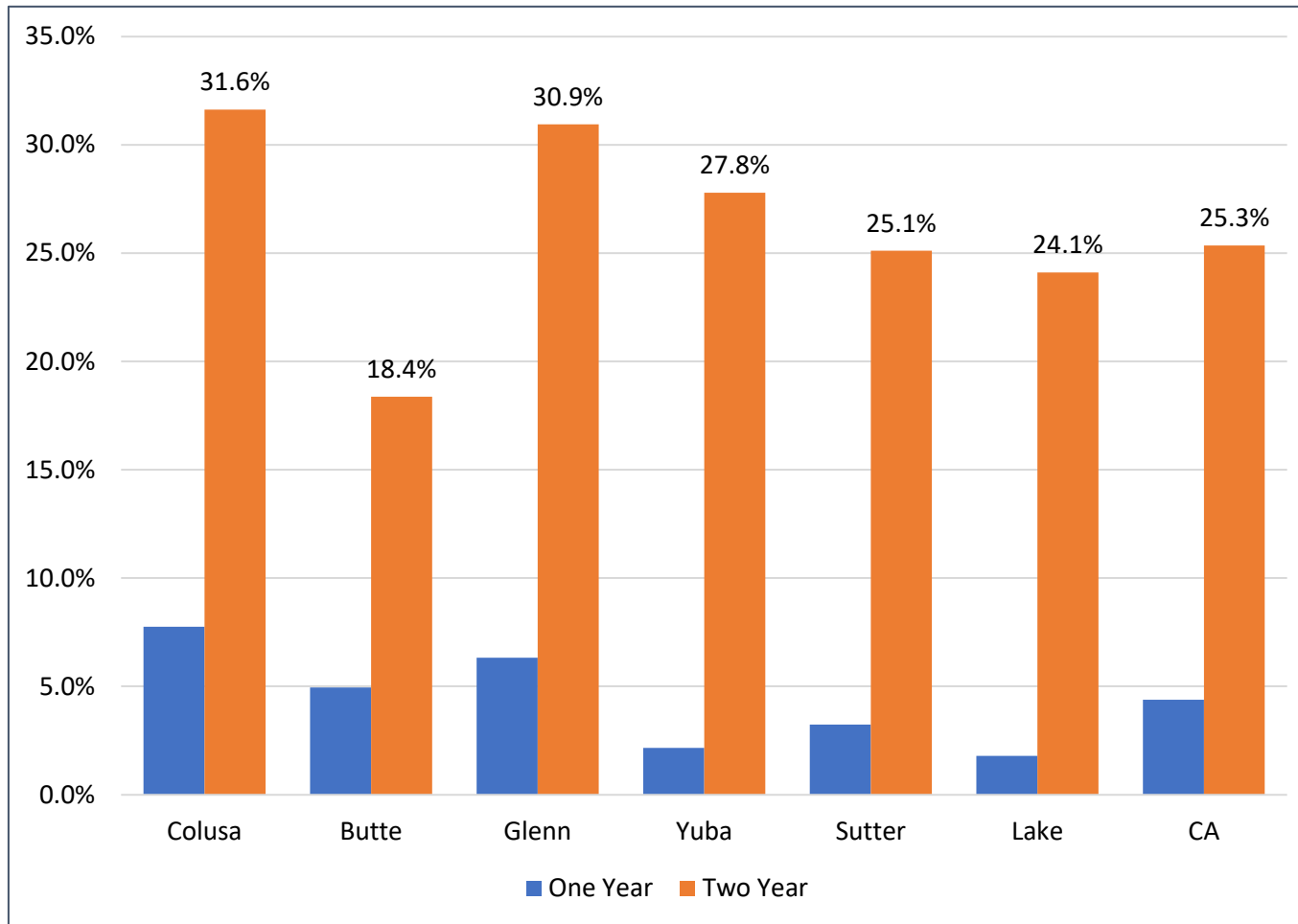


Rented homes increased slightly from 2017 to 2021.

Unfortunately, owner-occupied homes decreased by about three percentage points. According to the US Census Bureau (ACS 5-Yr Estimates) rental costs increased by 2.2 percent a year 2017 to 2021; from \$896 to \$974.

Housing Market: Median Home Price Percent Change Looking Back One Year and Two Years, from December 2022

Source: Zillow^M Research



These north state counties experienced robust two-year growth in median home prices. This is good news for homeowners. But for renters, this is also an indication of how much more difficult it is to find a home that is affordable for much of the working population.

Colusa County Median Home Price

Dec 2022 - \$362,880

Dec 2019 - \$268,105

Dec 2022: Median \$

Butte \$414,100

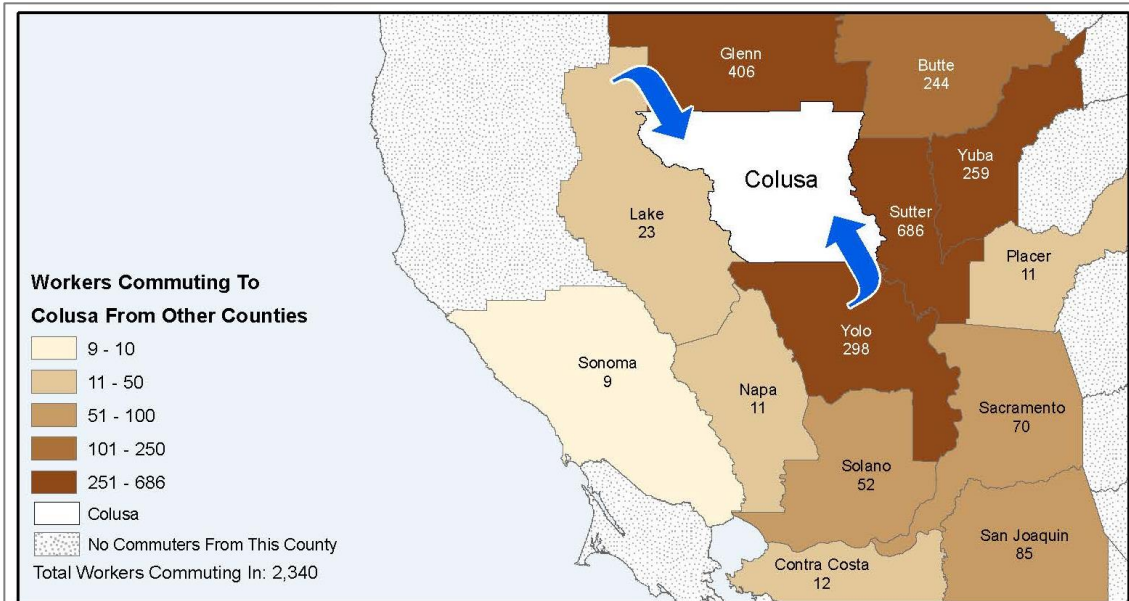
Glenn \$363,000

Yuba \$400,100

Sutter \$442,100

Lake \$340,400

CA \$760,600

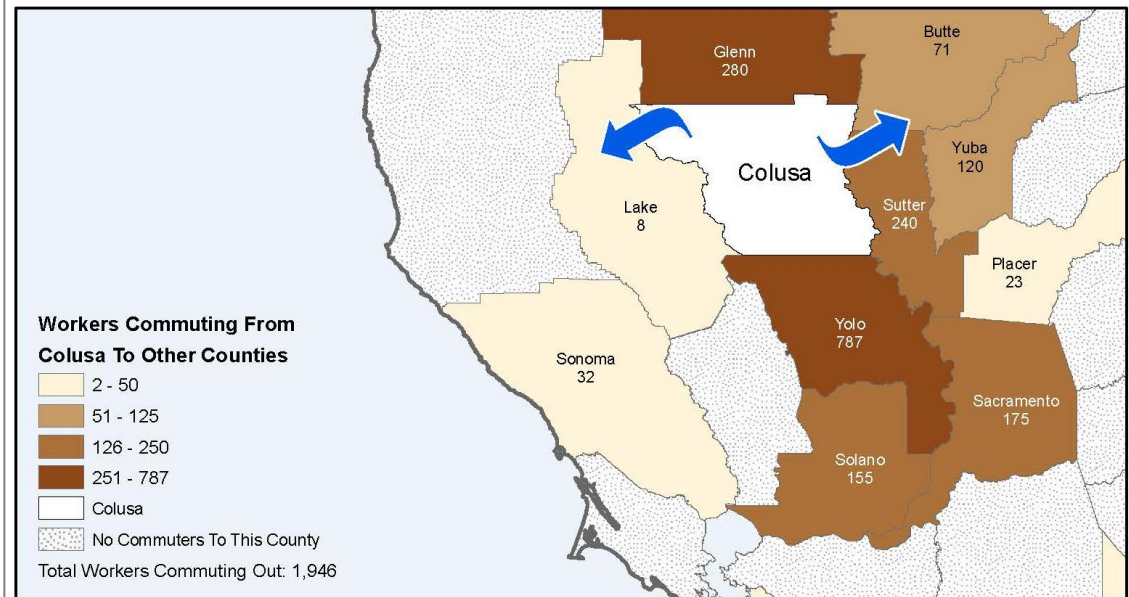


Colusa County Commute Pattern

Source: California EDD, Labor Market Information, Oct. 2022

The map graphics shows the inflow (top) and outflow (bottom) of workers in Colusa County.

- 6,624 workers live and work in Colusa County
- 2,340 workers commute into Colusa County for employment, primarily from
 - Glenn County
 - Sutter County
 - Yuba County
 - Yolo County
- 1,946 workers leave Colusa County for employment, primarily to
 - Glenn County
 - Yolo County



Total Workers Who Live and Work in Colusa: 6,624

Data Source:
Special Report of 2011 to 2015 County-to-County Commuting Flows,
American Community Survey, U.S. Census Bureau,
report released 2019

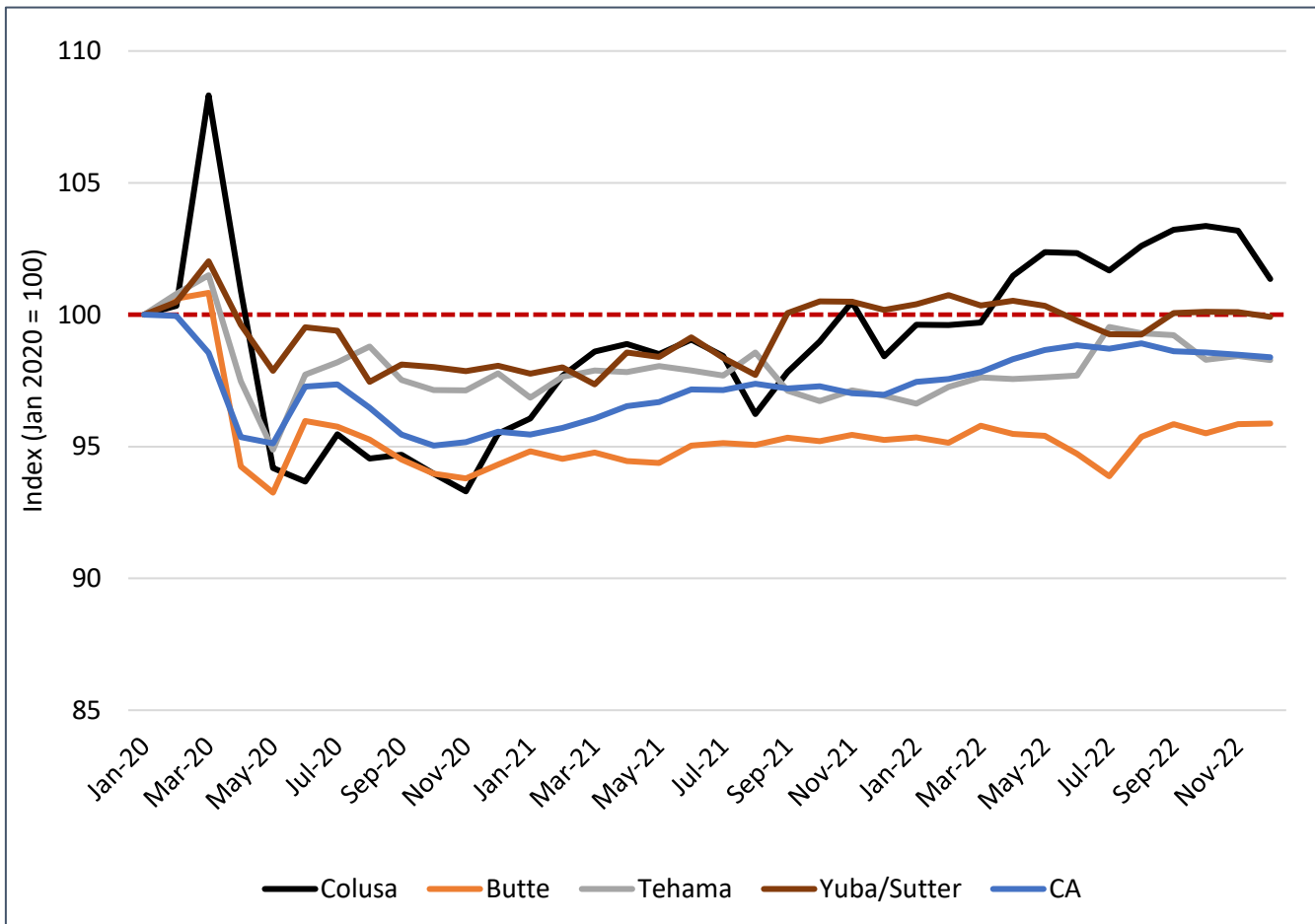
Cartography by:
Labor Market Information Division
California Employment Development Department
October 2022



Residential Labor Force as of Dec 2022

Seasonally Adjusted Selected Counties and CA, Jan 2020 = 100

Sources: California EDD, Bureau of Labor Statistics, and EFA, Data are Seasonally Adjusted



Labor supply versus labor demand is a major issue statewide. Colusa County has experienced more recovery here versus regional neighbors in terms of available workers. It has distinguished itself by having people available for work and showing more growth in labor force than comparative areas.

January 2020 was used as the pre-pandemic benchmark to understand the shock caused by the pandemic and the evolution of the labor market in Colusa County and some other comparative, nearby counties. This chart encapsulates what happened in the regional labor market over the last three years.

Colusa County took a sharp drop in May 2020 as did most of California and the nation.

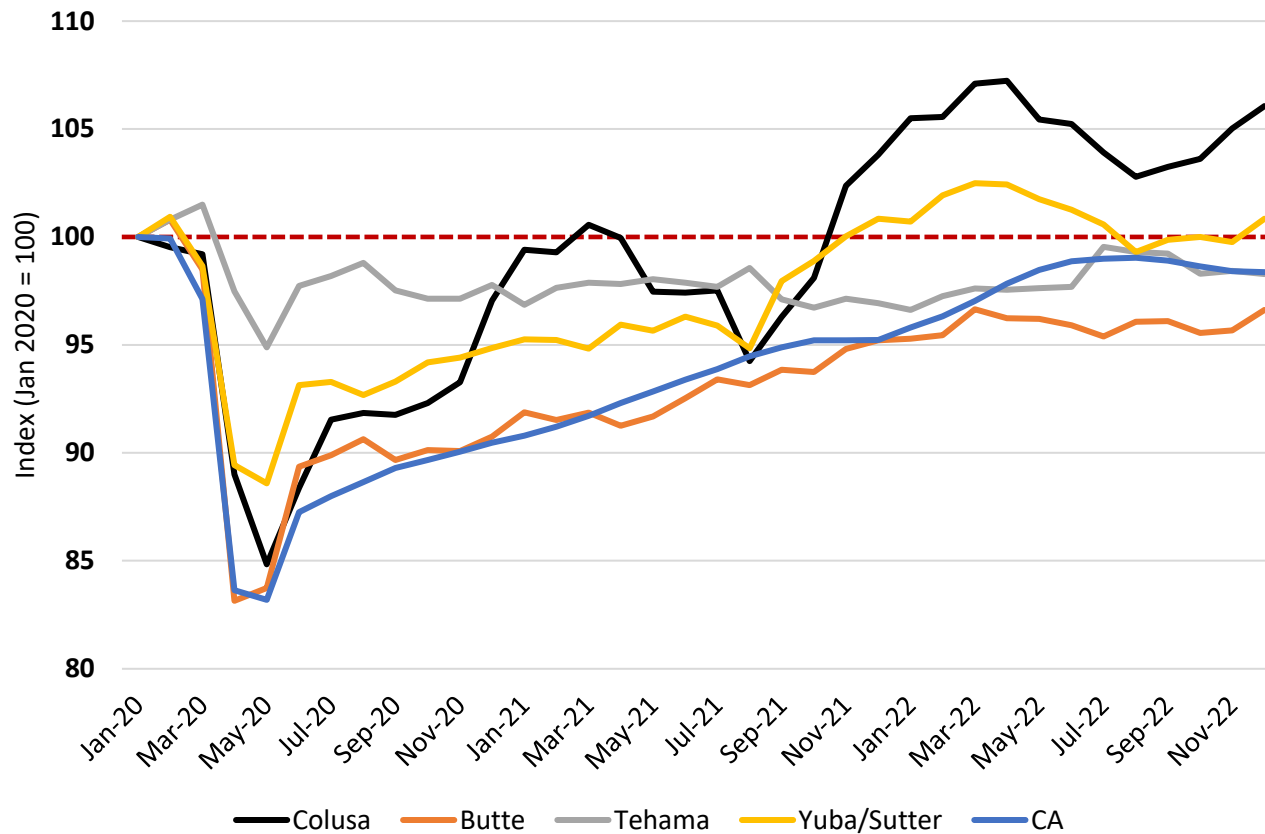
Around March 2022 Colusa County regained its labor market and has continued to grow—unlike several of the comparative counties displayed.

What this graph does not tell is who or how many workers are available to local employers versus regional employers—how many people living in Colusa County are commuting out to larger labor markets.

Residential Employment as of Dec 2022

Selected Counties and CA, Jan 2020 = 100

Sources: California EDD, Bureau of Labor Statistics, and EFA, Data are Seasonally Adjusted



Similar to residential labor force, employment took a sharp drop, then growth began in May 2020 and continues. This suggests that people who live in Colusa County are working and bringing their incomes and spending in Colusa County. Capturing this household income is critical to rural economic development.

Residents with jobs provide local support for retailers and other merchants of goods and services.

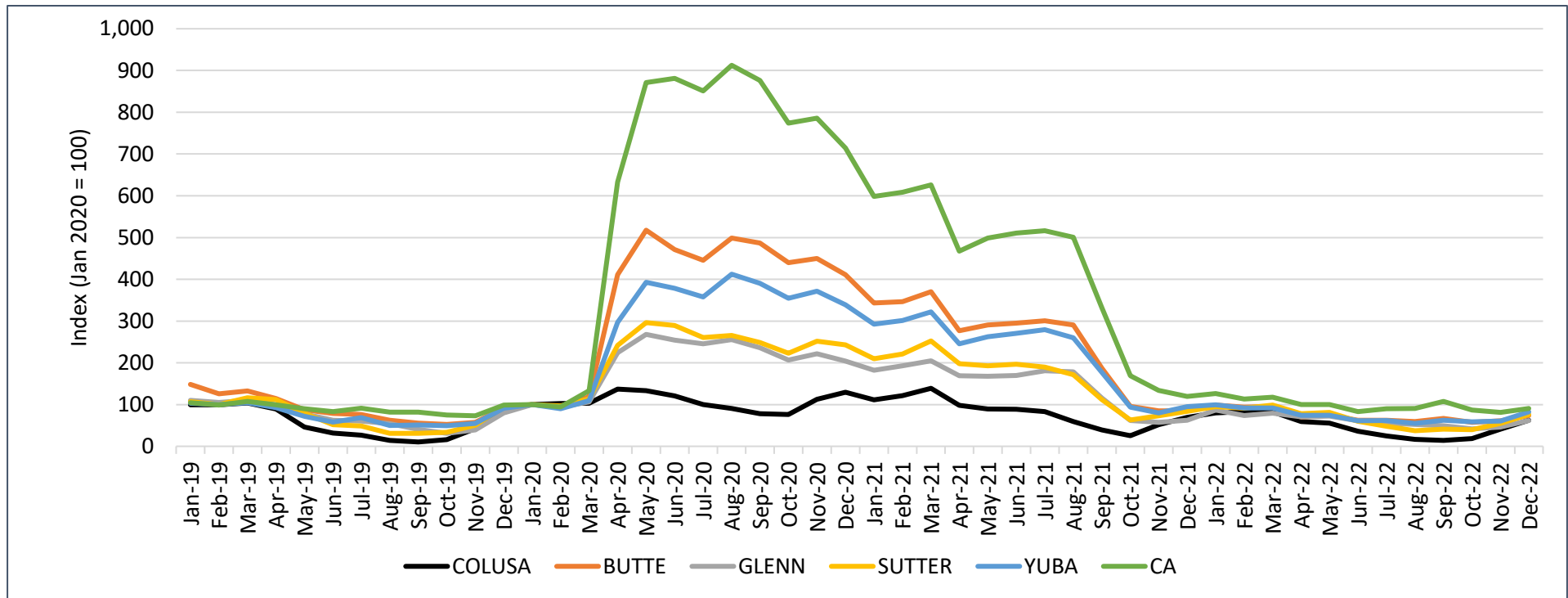
This and the previous slide suggests that Colusa County has made its way through the pandemic relatively well and better than the state overall.

Colusa, being a place where workers were more available, has translated into more county residents being employed compared to pre-pandemic levels versus other regional counties.

Caveat: these data do not capture the self-employed, so data is under-reported, making the situation in Colusa that much better.

Continued Claims for Unemployment Insurance Selected Counties and CA, Total Claims, Index Jan 2020 = 100 to Dec 2022

Sources: California EDD and EFA, Data are Seasonally Adjusted



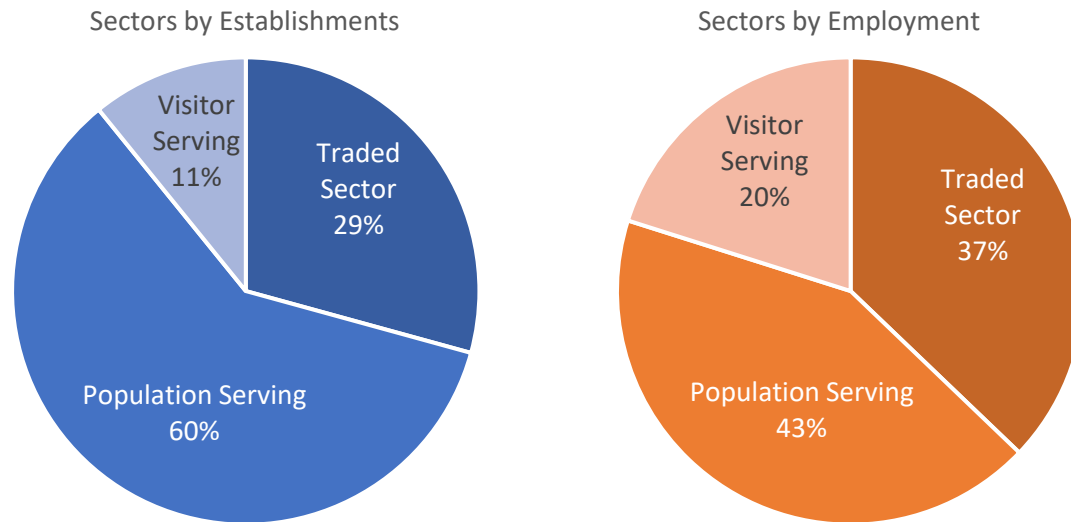
Colusa County was more resilient in terms of keeping residents working during the depths of the pandemic recession (as evidenced by fewer claims for unemployment insurance). However, there has been a recent, small increase following broader trends of job losses.

This chart displays continued unemployment claims, not new claims. The sum of claims over a twelve-month period gives a better picture of the trend versus a month or quarterly snapshot of unemployment.

In Colusa County people were not claiming unemployment for very long. There were no surges as can be seen in Butte, Yuba Sutter, and especially the State. Data show that the core of north state—Colusa, Butte, Glenn, Sutter and Yuba Counties area was much more resilient than the state overall.

Economic Base

Source: US Census Bureau, 2020 County Business Patterns



A strong economy is balanced with employment and revenue from each economic sector:

- The **traded sector** consists of businesses that provide goods and services to customers outside of the region; they export goods and import dollars e.g., manufacturing, processing, distribution.
- **Population serving** businesses provide goods and personal services to residents; these are primarily retail businesses but also include medical care, construction, engineering, finance.
- **Visitor serving** businesses are those that attract or serve business and tourism visitors e.g., lodging, food service, and destination attractions. Businesses can be a hybrid of population and visitor serving in that they may provide goods and services to locals as well as those who are traveling through the region e.g., restaurants, service stations.

Colusa County’s economic base is weighted to the population serving industries whether measured by the number of establishments or employment.

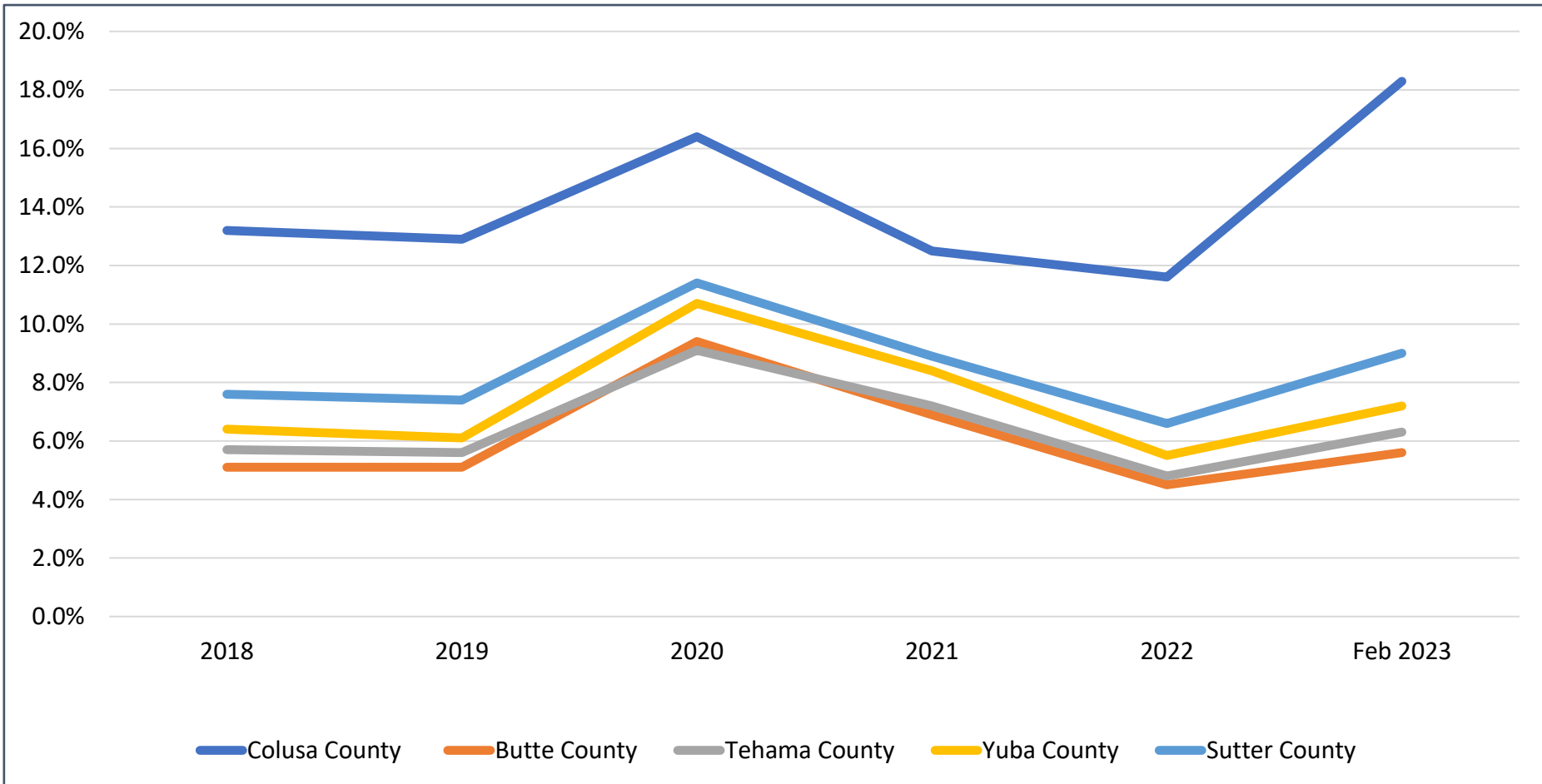
The importance of growing and strengthening the traded sector is that these businesses import dollars into the economy and tend to offer higher wages which enable employees to increase spending on household items and adds to disposable income. Also, when traded sector businesses purchase raw materials and use local services, such as machine shops, this further supports local hiring and expands the traded sector.

Like the traded sector, the visitor serving sector imports dollars into the economy. Because recreation is an important local asset, expanding the visitor serving sector will also help to strengthen and diversify the economy.

The performance of Colusa County industry sectors is further discussed in this document.

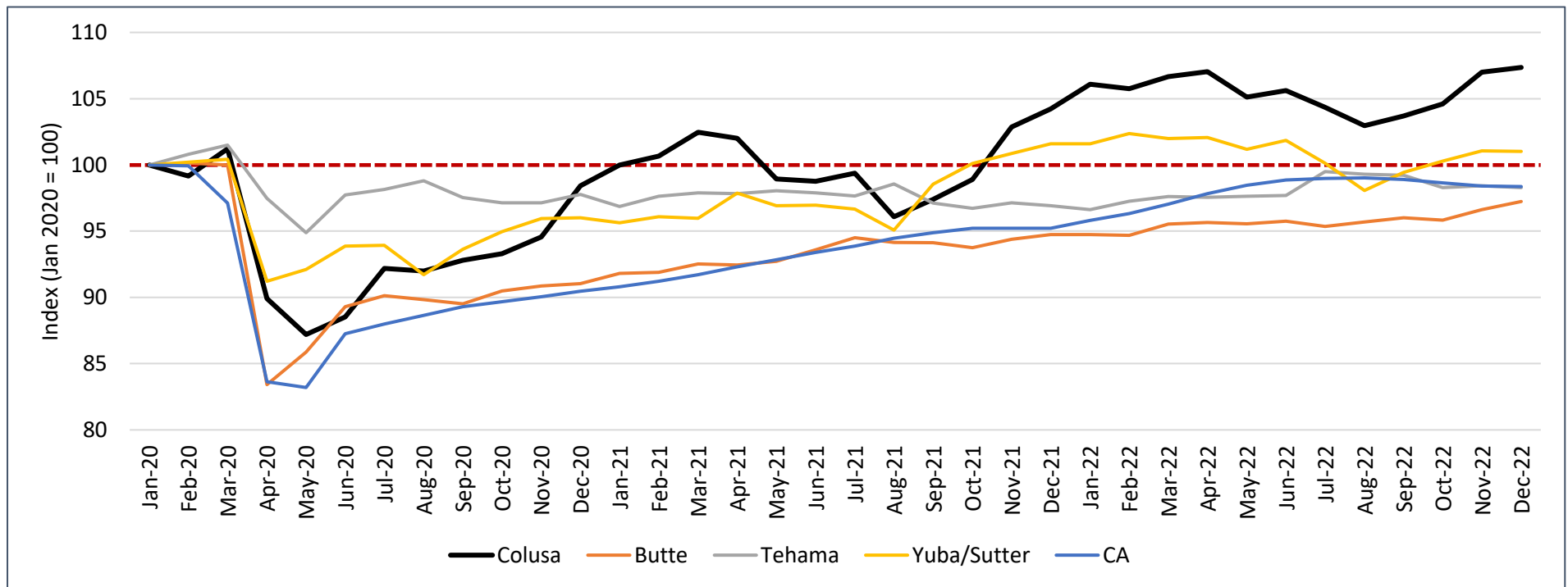
Historic Unemployment

Sources: California EDD Labor Market Information Division; Annual Average Unemployment (data not seasonally adjusted)



Jobs at Colusa County Employers Compared to Selected Counties and California Index, Jan 2020 = 100, Jan 2020 to Dec 2022

Sources: California EDD, Bureau of Labor Statistics, and EFA, Data are Seasonally Adjusted



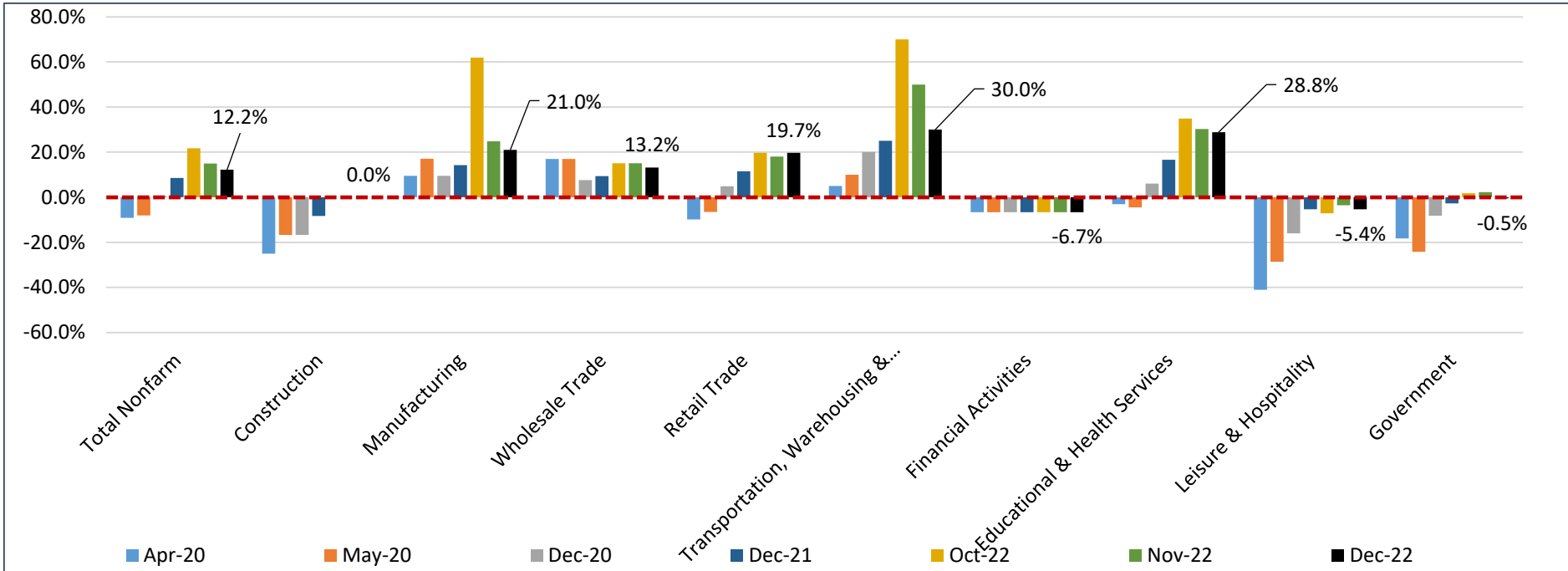
Colusa County is again a positive standout and shows a similar picture, a sharp drop in jobs and then recovery showing regional strength in terms of local employers providing jobs.

More current commute data is the missing link to providing a fuller picture. It is only officially available to 2019 so this chart does not show people who live in Colusa and may be working elsewhere.

But because of the growth of the labor force, the number of people living in Colusa County who have employment, and the increase in the number of Colusa County jobs, suggests that Colusa County residents and workers are doing as well or better than before the pandemic

Percent Change in Employment by Industry, Colusa County Compared to Jan 2020 as of Dec 2022

Sources: California EDD, Bureau of Labor Statistics, and EFA



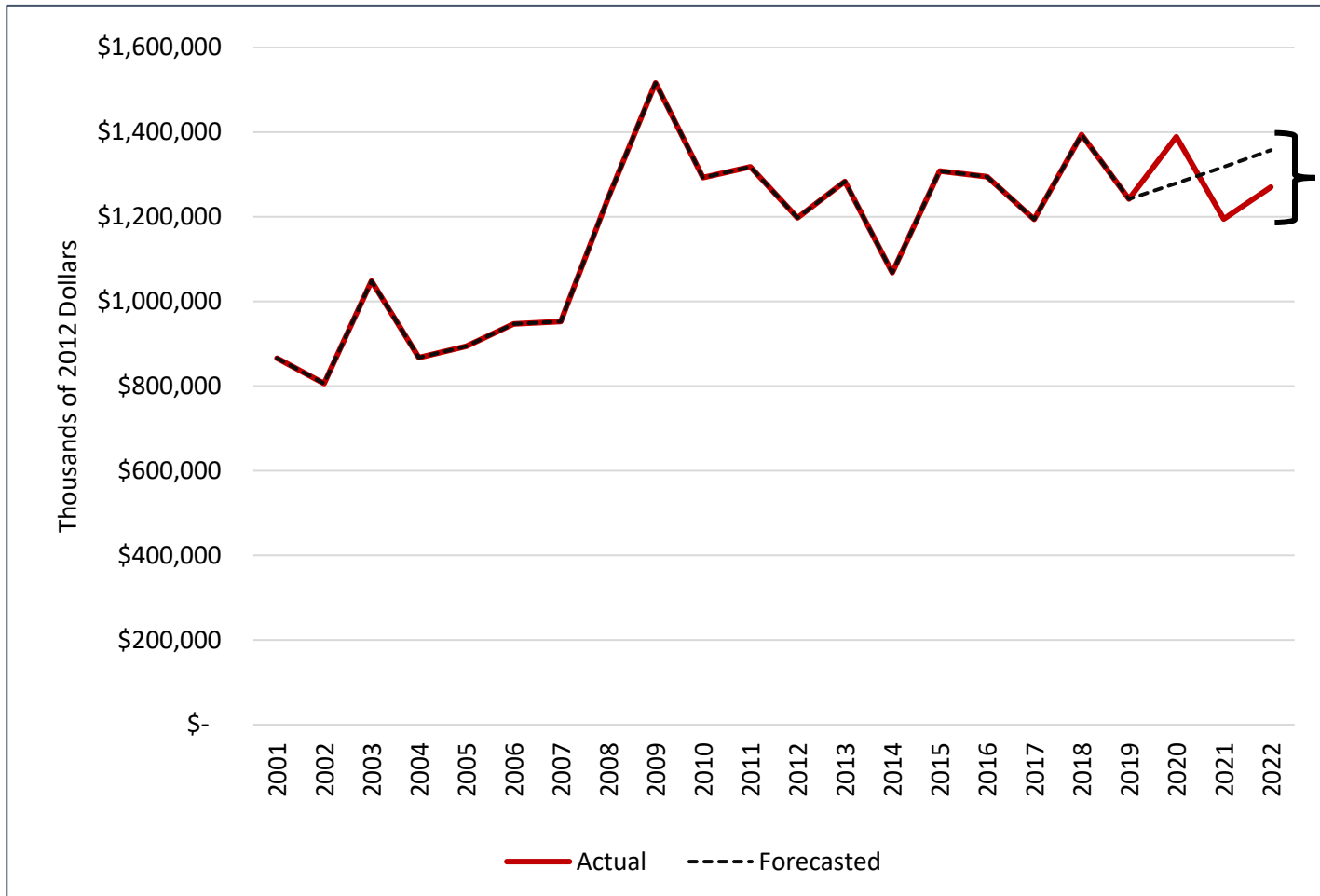
By December 2022, most of the major industrial sectors in Colusa county have recovered, some very well. Even though there are a lot of positives, some industries continue to struggle.

These data show Colusa County has seen growth across its major industry sectors since the pre-pandemic benchmark (January 2020). Finance, banking, insurance and real estate hiring has remained stable after the initial losses. Leisure and hospitality has recovered early losses, but now is at a stable level. Though still down, this is not an anomaly. The industry has not seen recovery throughout all of California.

There is concern if these jobs will ever come back. While the leisure and hospitality is sector does not offer higher-paying jobs, it is an important sector. One reason being is that high school graduates and people who are transitioning between jobs or into the workforce, tend to rely on this sector.

GRP Regionally: Where Are We? Real Gross Regional Product (Thousands of 2012 Dollars) 2007 to 2022 (Estimated) and if COVID-19 Had Not Happened (Estimated)

Sources: Bureau of Economic Analysis and EFA

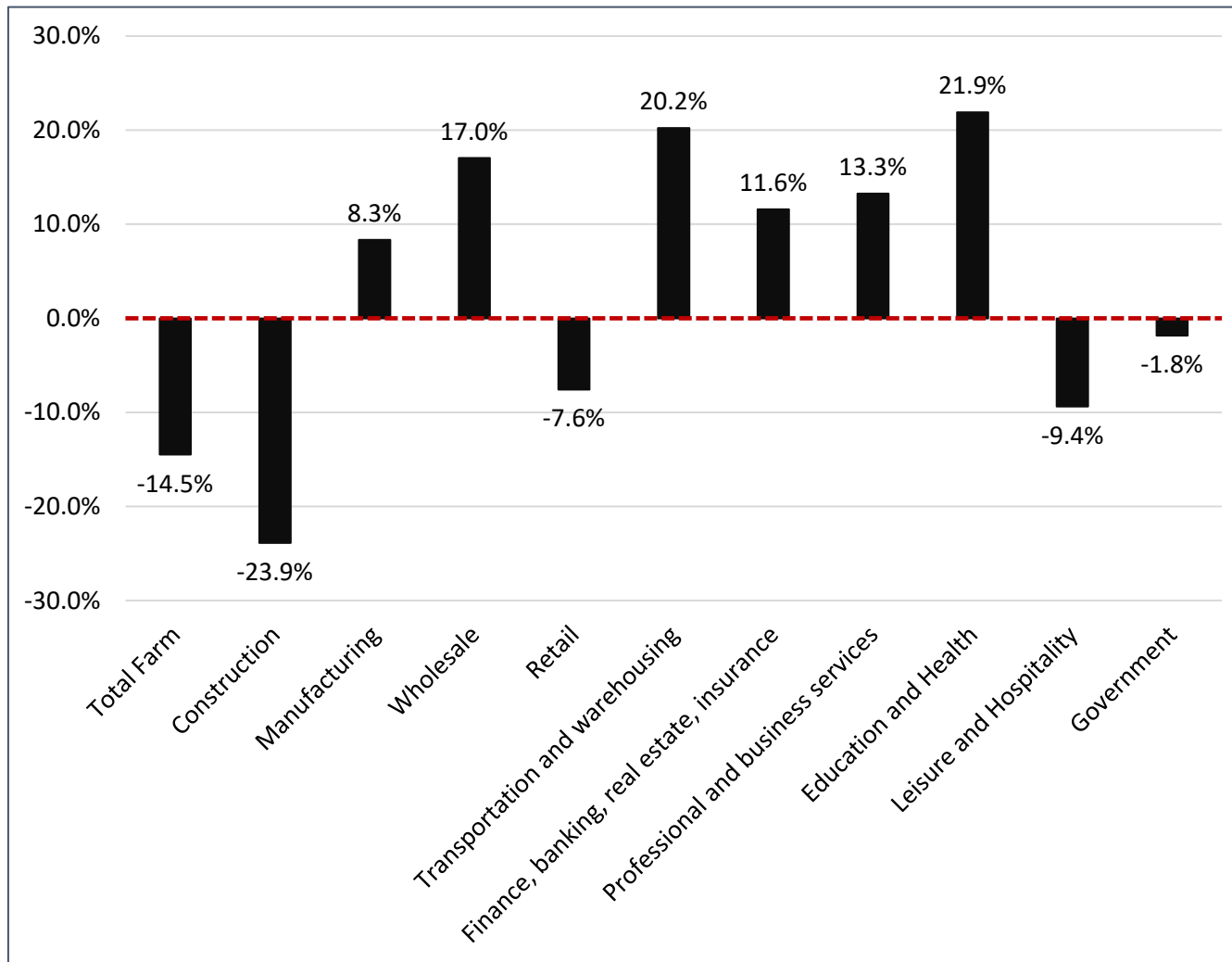


This chart shows the evolution of Colusa County income generation after inflation. The ups and downs follow employment, as expected.

The black dotted line is the estimate of where Colusa County would have been if the pandemic had not happened and if the county had followed growth trends. Jobs are back but this shows that the types of jobs are not as productive in terms of generating income which is again consistent with what is seen throughout California and most of the nation.

GRP by Industry, Thousands of 2012 Dollars, Colusa County, % Change from 2019 to 2022

Sources: Bureau of Economic Analysis and EFA



The gap from previous chart can be seen here as being in construction and farming, and to a lesser extent retail, leisure & hospitality.

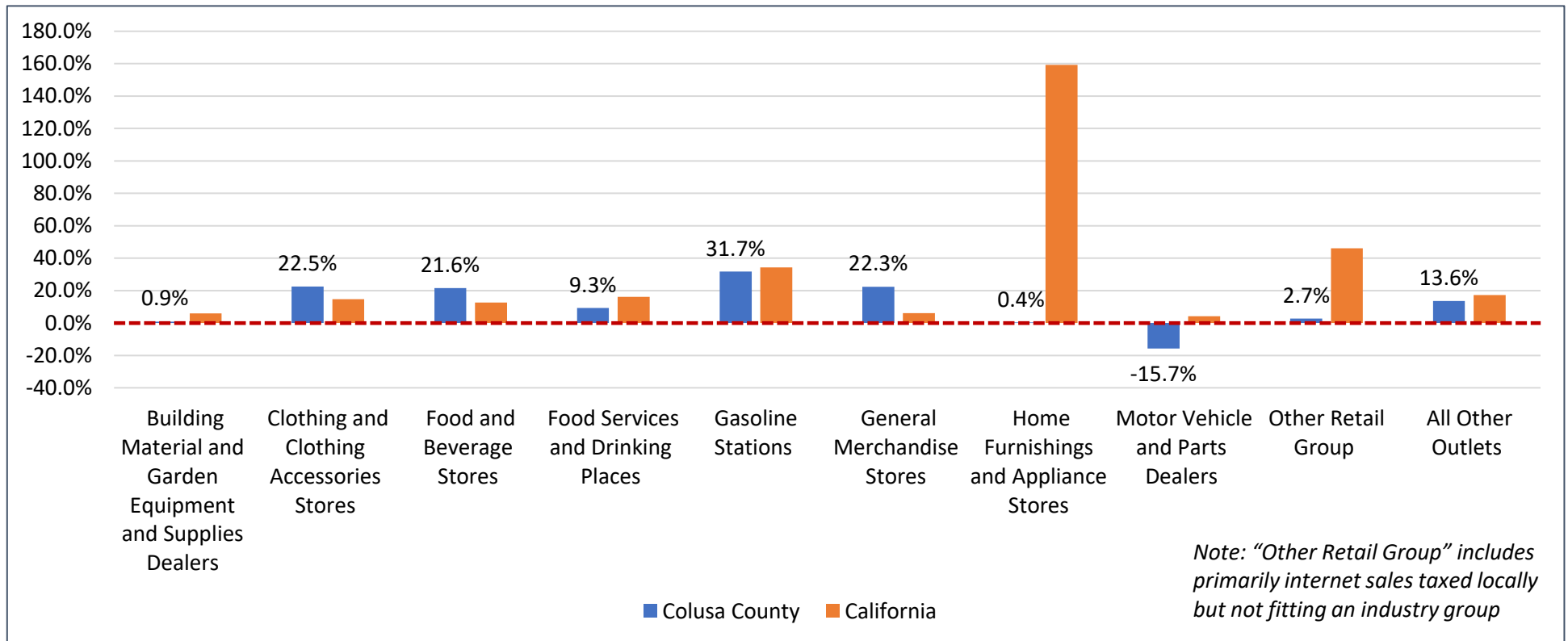
While Colusa County construction and farm businesses may be generating income, they may be generating it in some other county. Contractors are working outside of Colusa County where construction jobs are more plentiful.

The gaps follow industry job losses, but losses are less pronounced than jobs due to the household fiscal stimulus and PPP.

- Most industries in Colusa County have seen incomes increase since 2019 (pre-pandemic)
- Construction jobs just recovered in 2022 from the original shock from the pandemic
- Farm incomes have fallen, most likely due to a mix of drought, inflation, and harvest issues
- Retail reductions are likely due to some businesses being lost and inflation

Taxable Sales, % Change Q3 2019 to Q3 2022: Raw Dollars (Not Inflation Adjusted)

Sources: California Department of Tax and Fee Administration (CDTFA) and EFA



The pandemic and stay-at-home policies positively impacted retail spending in home furnishings and appliance stores because people were home more. made improvements and established or expanded home offices.

In Colusa County, there is are not as many retail choices, so the change is not going to be as great. But the fact that numbers are positive means there were purchases in a broad range of categories and people are confident even with all the uncertainty of the last three years.

Workforce Development and Labor Force in Colusa County, 2000-2050

Sources: California Department of Finance and EFA



An available and skilled workforce is critical to business success and to the county’s economic recovery and expansion.

The growth or decline of four components of the Colusa County labor force is depicted here.

A declining Talent Pipeline and Prime Workers suggests demographic changes and continued challenges for businesses needing employees.

An increasing older population also puts more pressure on the working population to support government and social services with tax dollars.

Talent Pipeline—births, working families

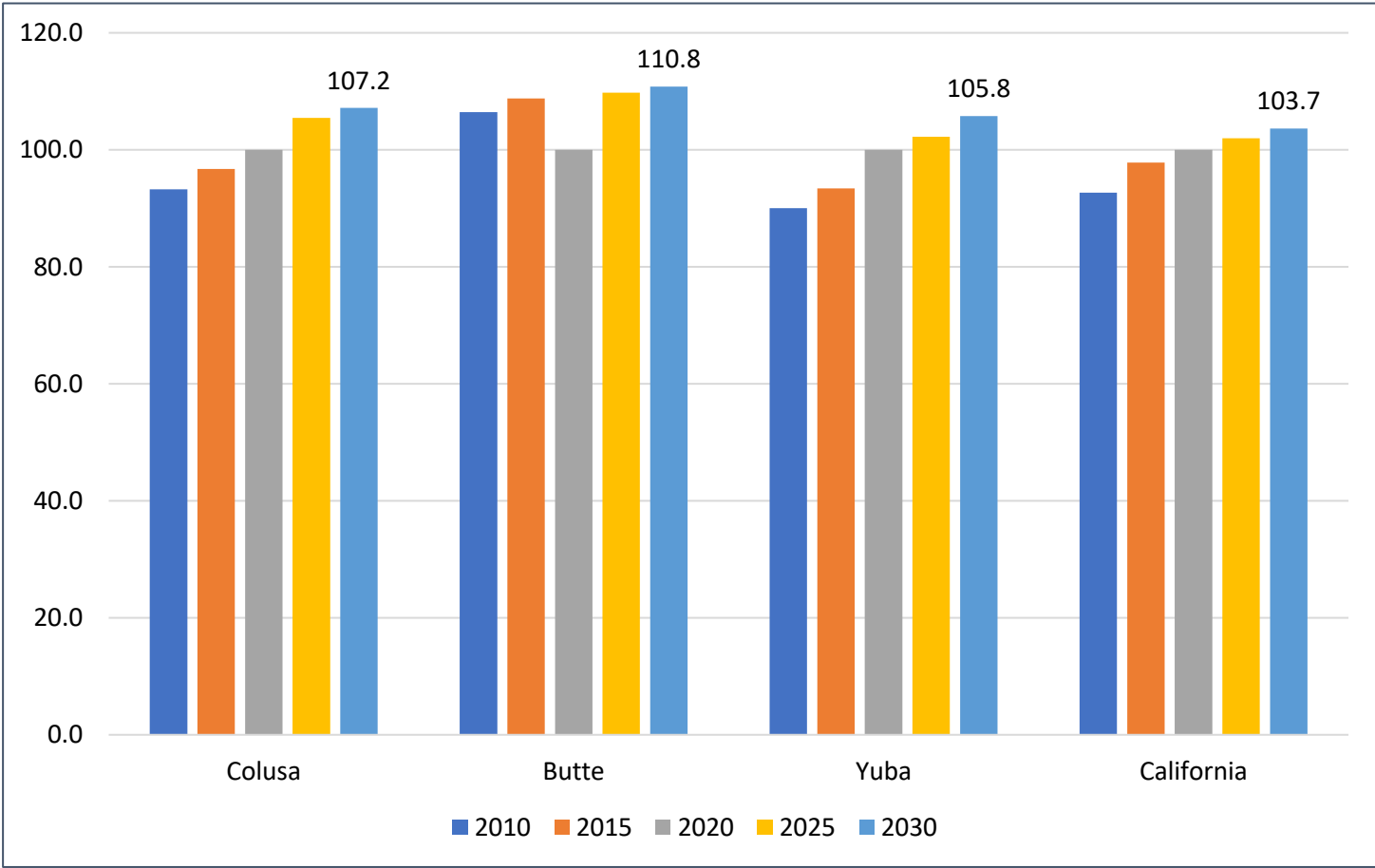
Prime Workers—current students and new high school and college graduates

Experienced Workers—parents of the talent pipeline

Retiring Soon—the more senior workers who will not be in the labor market much longer

Labor Force (LF) Actuals and Forecasts, 2010-2030. The Labor Force is defined as the population aged 18 to 74, aggregated by county and compared to CA, Jan 2020 = 100

Sources: California EDD and EFA



Colusa County labor force predictions are following statewide forecasts (unlike nearby Butte County).

The 2018 Camp Fire in Butte County and subsequent migration patterns remain an issue in Butte County’s labor market.

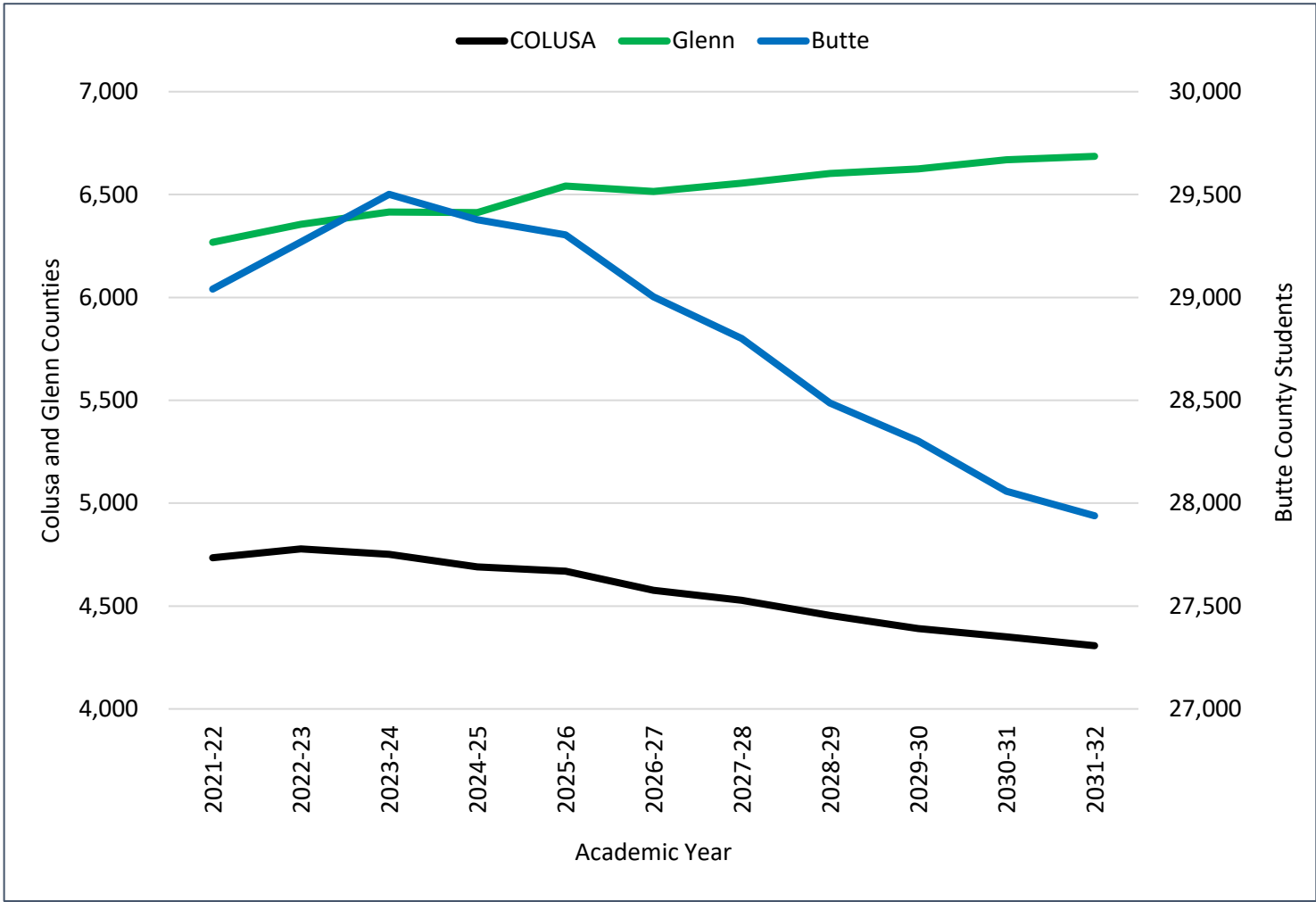
Migration to Colusa County is likely to continue to provide workers into 2030, as it ages slightly slower than before 2020.

Have to presume population will continue to age (on average). What this means for the local labor force is an unknown.

- From where will Colusa County employers draw workers
- Where will Colusa County residents find employment

K-12 Attendance Forecast – Enrollment Cliff

Sources: California Department of Finance and EFA



Colusa County K-12 enrollment is expected to drop approximately 9 percent over 10 academic years. This decline is a function of an aging population.

An aging population, fewer births, and fewer families moving to the area can greatly impact school budgets and endanger this important community asset.

The predicted percent change in nearby Butte County is similar to Colusa County, but Butte is home to many more workers.

Butte County -3.8%

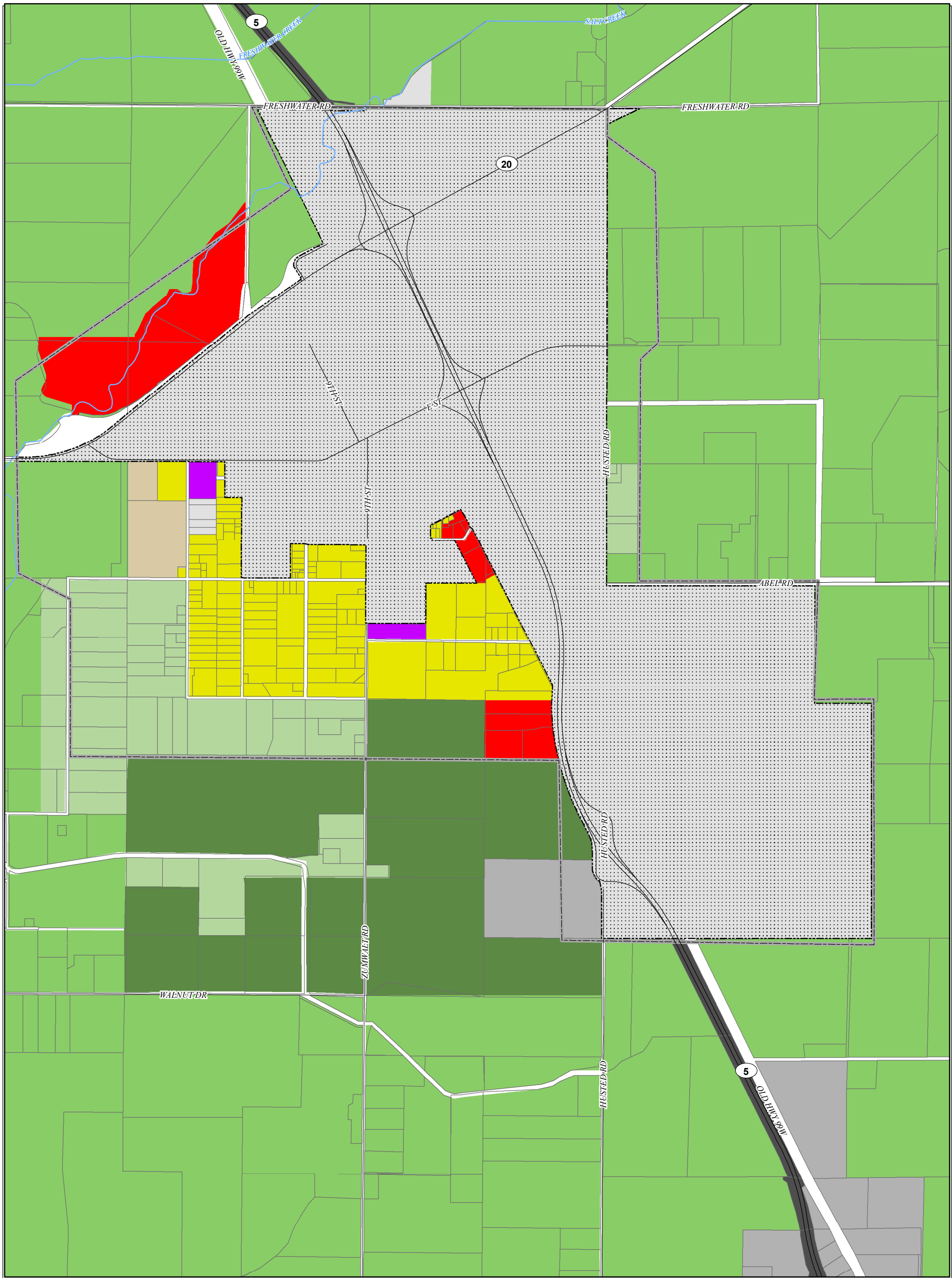
Glenn County +6.7%

Yuba County +7.2%

Sutter County +21.3%

California -8.9%

Appendix C

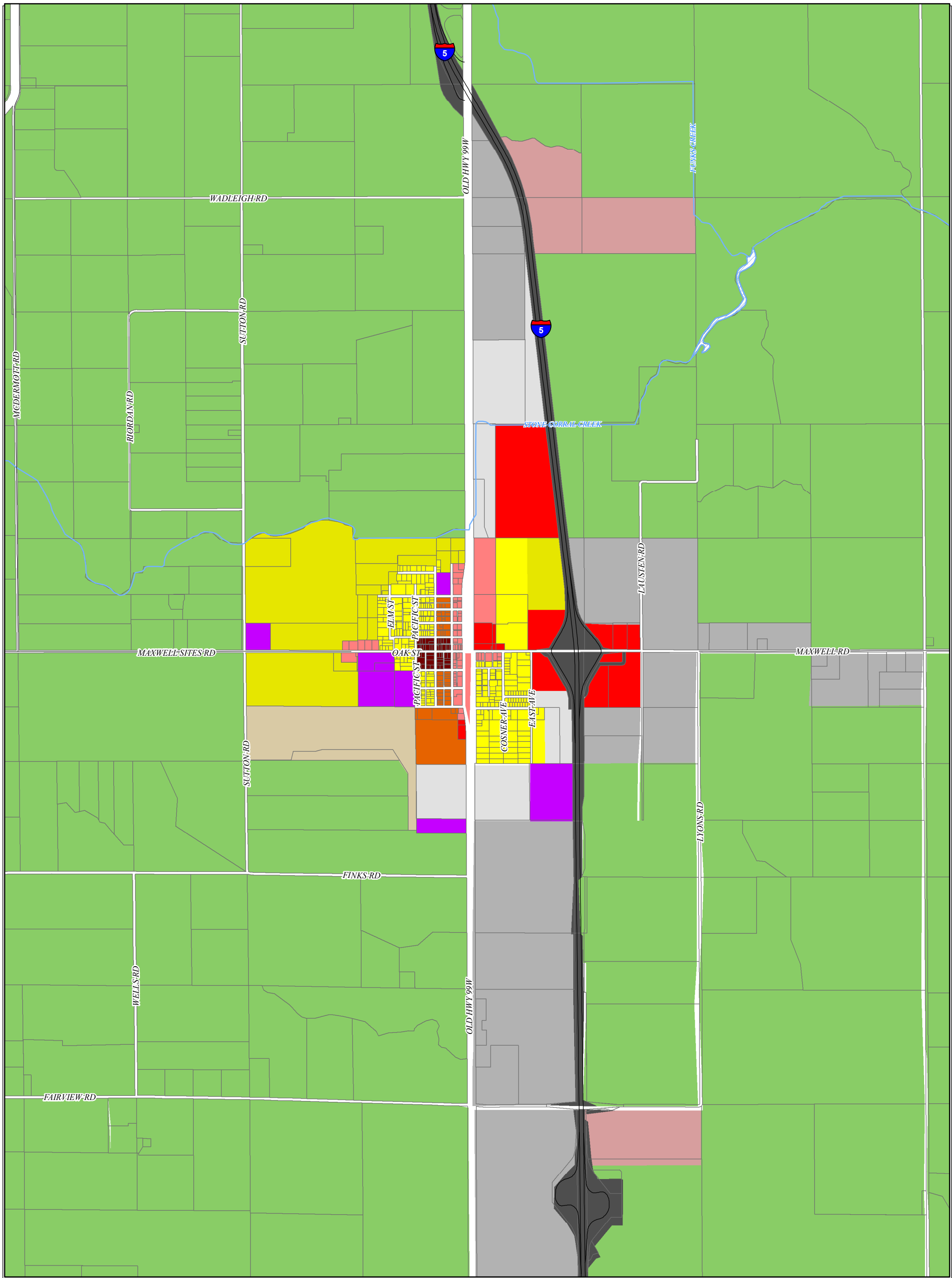


Spheres of Influence	E-A: Exclusive Agriculture	R-2: Residential Two-Family	R-F: River Frontage
Planned Development Overlay	UC-10: Upland Conservation <20ac	R-3: Residential Multiple Family	F-M: Flood Management
Wildlife Refuges	UC-80: Upland Conservation >20 ac	R-4: Apartment-Professional	FMR: Forest Management
Sites Planning Area	AT-10: Ag Transition <20ac	C-1: Neighborhood Commercial	FR: Forest Residential
County Boundaries	AT-20: Ag Transition >20ac	C-2: Community Commercial	R-M: Resource Management
Bodies of Water	RR-2: Rural Residential, 2-acre min. lot	C-H: Highway Service Commercial	G-R: General Recreation
City Boundaries	RR-5: Rural Residential, 5-acre min. lot	C-R: Commercial Resort	A-V: Airport
Bureau of Reclamation Lands	U-T: Upland Transition	MU: Mixed Use	P-F: Public Facilities
Parcels	R-1: Residential Single-Family	M-1: Light Industrial	R-S: Rural Services
Zone	R-1-6: Residential Single-Family, 6,000-s.f. min. lot	M-2: Heavy Industrial	T-L: Tribal Lands
F-A: Foothill Agriculture	R-1-8: Residential Single-Family, 8,000-s.f. min. lot	RD: Research and Development	State, Federal, and Other Agency Land

Colusa County Zoning Map
City of Williams

N

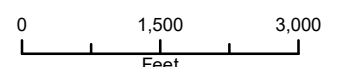
0 1,500 3,000
Feet

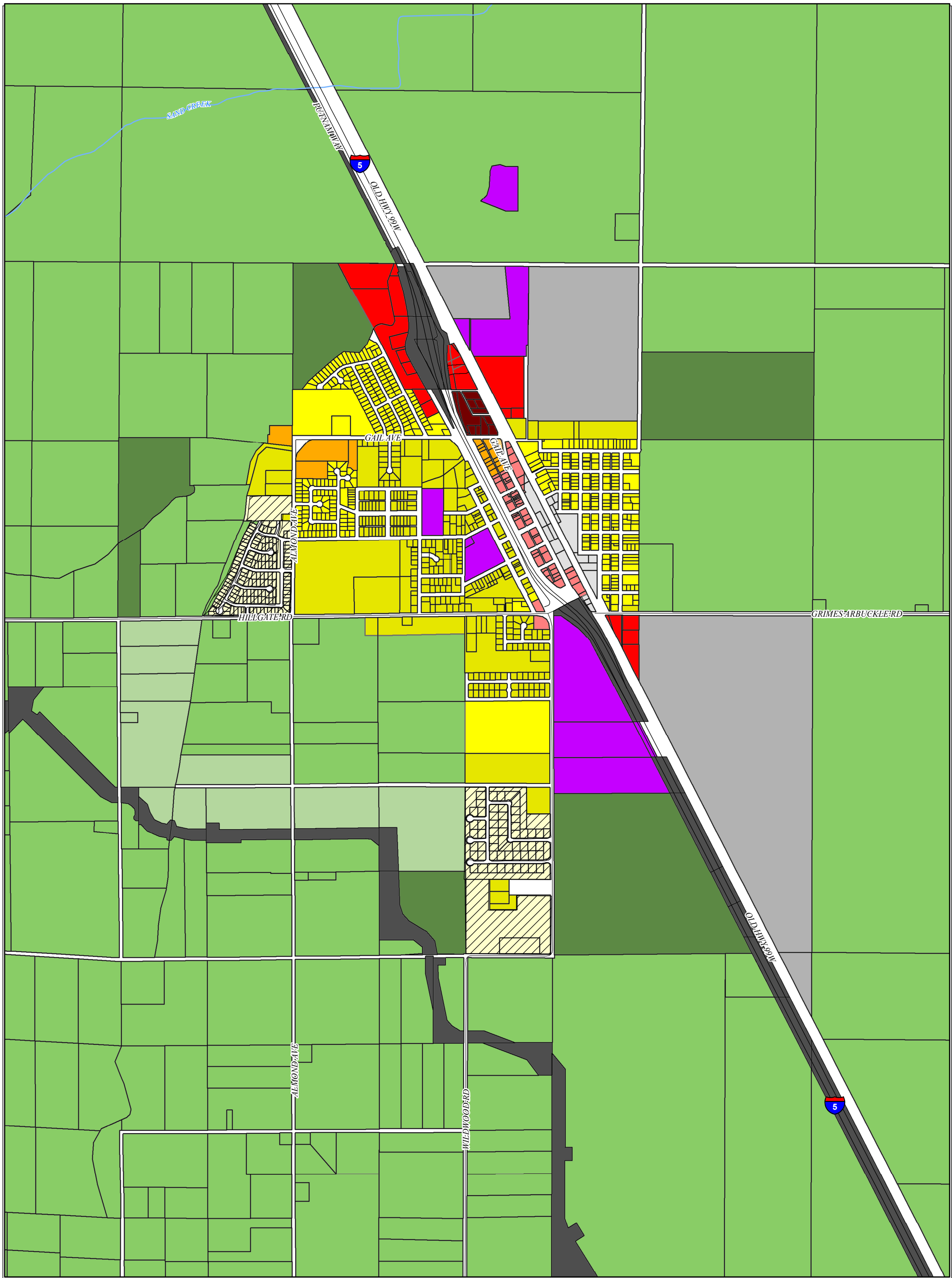


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F-A: Foothill Agriculture	R-1-8: Residential Single-Family, 8,000-s.f. min. lot	RD: Research and Development	State, Federal, and Other Agency Land

Colusa County Zoning Map

Maxwell





Spheres of Influence	E-A: Exclusive Agriculture	R-2: Residential Two-Family	R-F: River Frontage
Planned Development Overlay	UC-10: Upland Conservation <20ac	R-3: Residential Multiple Family	F-M: Flood Management
Wildlife Refuges	UC-80: Upland Conservation >20 ac	R-4: Apartment-Professional	FMR: Forest Management
Sites Planning Area	AT-10: Ag Transition <20ac	C-1: Neighborhood Commercial	FR: Forest Residential
County Boundaries	AT-20: Ag Transition >20ac	C-2: Community Commercial	R-M: Resource Management
Bodies of Water	RR-2: Rural Residential, 2-acre min. lot	C-H: Highway Service Commercial	G-R: General Recreation
City Boundaries	RR-5: Rural Residential, 5-acre min. lot	C-R: Commercial Resort	A-V: Airport
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F-A: Foothill Agriculture	R-1-8: Residential Single-Family, 8,000-s.f. min. lot	RD: Research and Development	State, Federal, and Other Agency Land

Colusa County Zoning Map
Arbuckle

N

COLUSA COUNTY
CALIFORNIA

0 1,000 2,000
Feet

Appendix D

Appendix D – Reference Documents

Resource	Author	Date
The Economic Impact of Travel in California	Dean Runyan Associates	2023
Colusa County Drought Crisis (documentary video)	Colusa County Department of Health and Human Services	2022
City of Colusa Pavement Management Plan	Pavement Engineering, Inc.	2022
County Housing Element Update	Colusa County Community Development Department	2020
City of Colusa 2020 Comprehensive Economic Development Strategy (CEDS)	Golden Oak Business Services	2020
Feasibility Analysis and Business Case for a Potential Cold Storage Facility	Morrison & Company for the City of Willows	2019
Colusa County Regional Transportation Plan Update	Colusa County Local Transportation Commission	2019
Local Agency Management Program for Onsite Wastewater Treatment Systems	Colusa County Environmental Health Services Department	2017
Colusa County 2030 General Plan	DeNovo Planning Group	2012
Downtown Colusa Economic Development Plan	City Design Collective	2012
City of Williams General Plan	City of Williams	2012
Civic Facilities Master Plan for the City of Colusa	Indigo	2009
City of Colusa Parks and Recreation Master Plan	Foothill Associates	2009
City of Colusa General Plan	City of Colusa	2007
www.VisitCalifornia.com (research and trends)	Visit California	2013-2022
University of California Cooperative Extension	website	n/a

Appendix E

Colusa County CEDS Committee

March 6, 2023 – Agenda

9:00-9:15	Welcome & CEDS Orientation	Greg Plucker Colusa County Community Dev. Dir.
9:15-10:00	Presentation on Economic Conditions; followed by Q&A	Dr. Robert Eyler Economic Forensics & Analytics, Inc.
10:00-10:45	Discussion Colusa County SWOT Goals	Vicki Doll Chabin Concepts, Inc.
10:45-11:00	Wrap Up and Next Steps	Greg Plucker Colusa County Community Dev. Dir.

CEDS Contents

- Analysis of Economic Conditions
- SWOT – Economic Problems and Opportunities
- Goals
- Economic Development Resources and Partnerships
- Strategic Projects, Programs, Activities
- Action Plan
- Performance Measures

CEDS TIMELINE	
FEB	<ul style="list-style-type: none">• Community Input• Research• Data Collection• Analysis
MAR	<ul style="list-style-type: none">• Strategy Development• Capital Improvement Plans• Document Prep
APR	<ul style="list-style-type: none">• Monday, April 10 @ 9:00 a.m.• CEDS Committee Review• CEDS Public Review
MAY	<ul style="list-style-type: none">• Revisions• Deliver to EDA for 30-day review

Current Economic Conditions

Dr. Rob Eyer



Colusa County CEDS

Existing Conditions Data

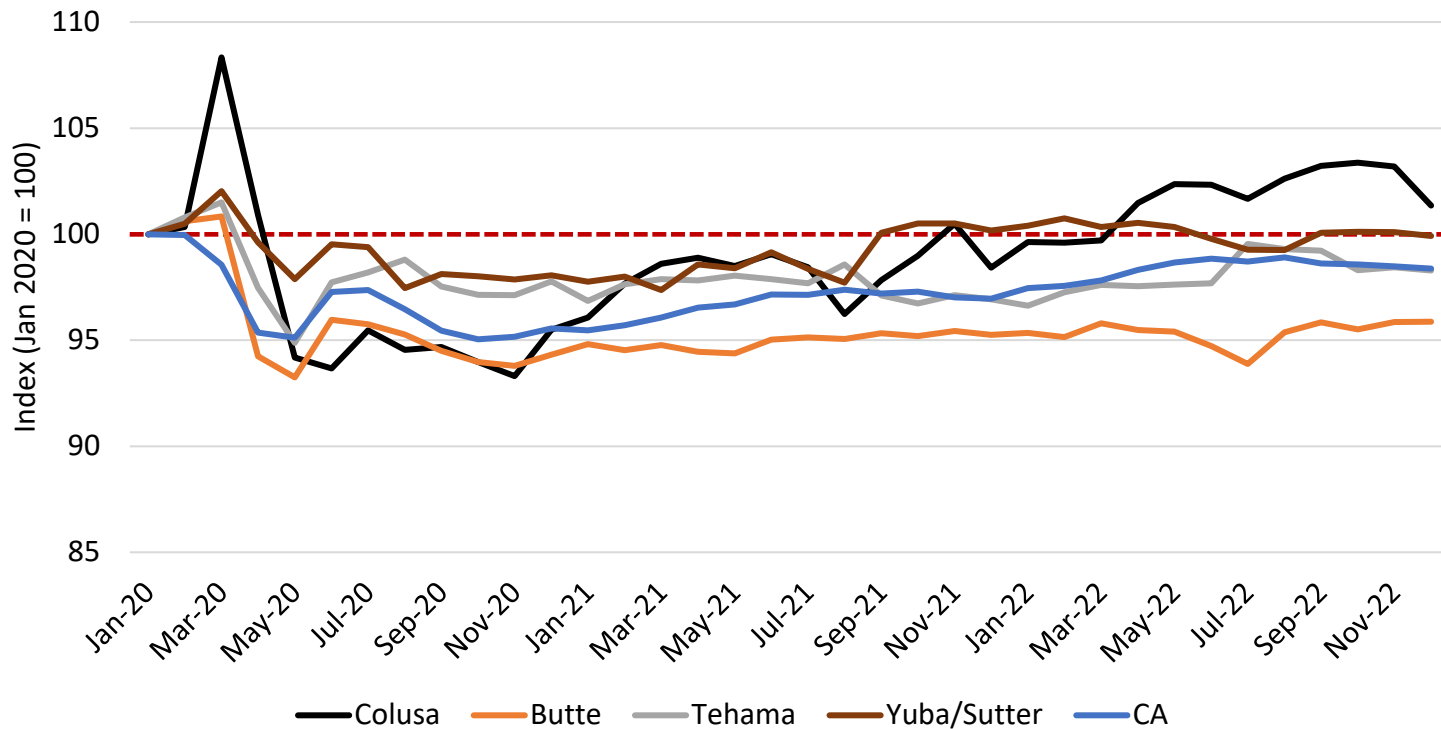
Robert Eyer, PhD

Economic Forensics and Analytics

eyer@econforensics.com

Presented March 6, 2023

Residential Labor Force, as of Dec 2022, Seasonally Adjusted Selected Counties and CA, Jan 2020 = 100

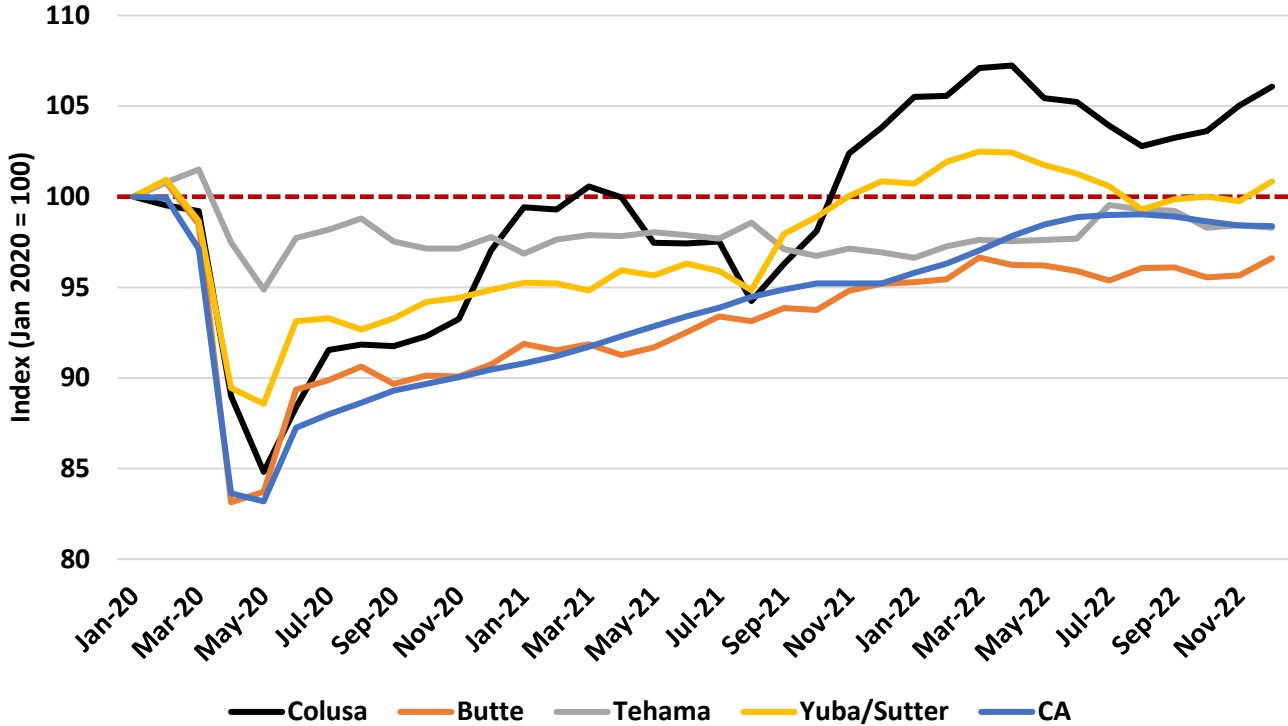


Labor supply versus labor demand a major issue statewide:

Colusa County has experienced more recovery here versus regional neighbors in terms of available workers.

Sources: California EDD, Bureau of Labor Statistics, and EFA, Data are Seasonally Adjusted

Residential Employment, as of Dec 2022, Selected Counties and CA, Jan 2020 = 100



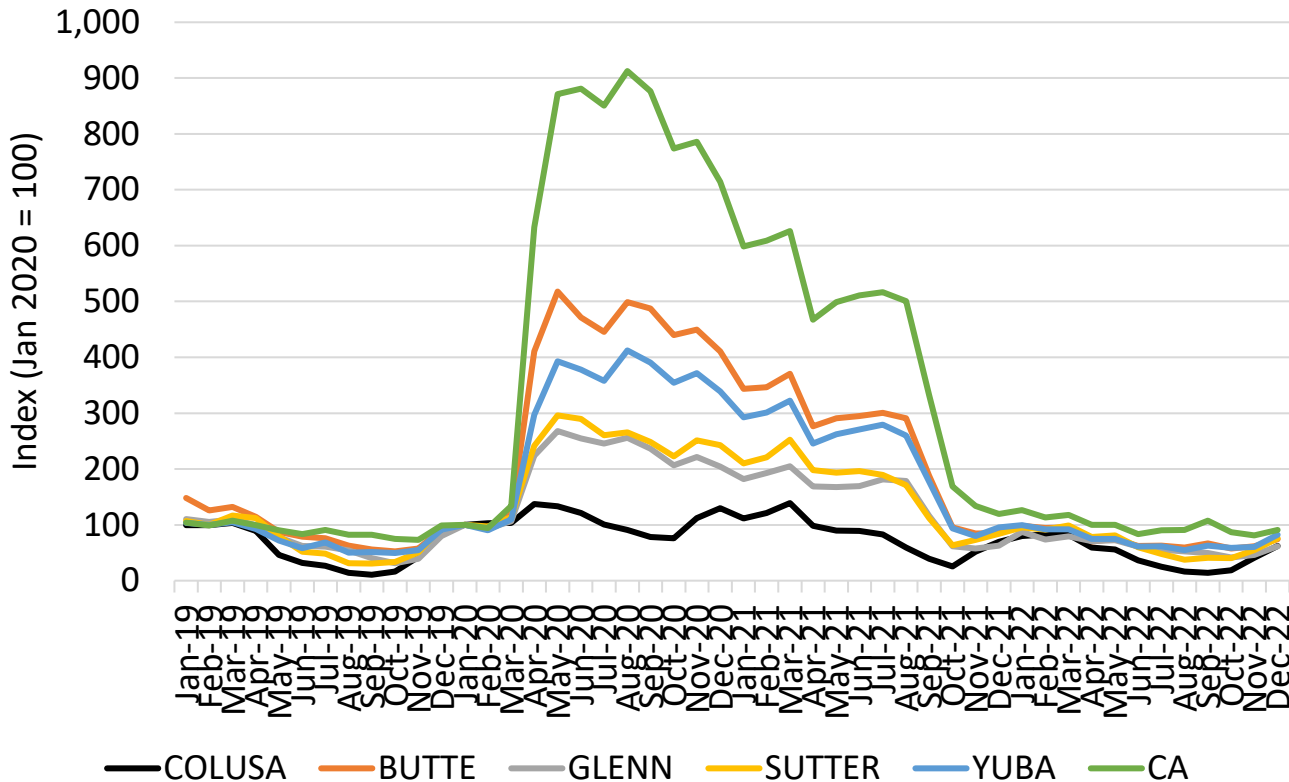
Residents with jobs provide local support for retailers and other merchants of goods and services.

Colusa being a place where workers were more available (see above) has translated into more county residents working compared to pre-pandemic levels versus regional counties otherwise.

Caveat: we are not measuring self-employed workers here.

Sources: California EDD, Bureau of Labor Statistics, and EFA, Data are Seasonally Adjusted

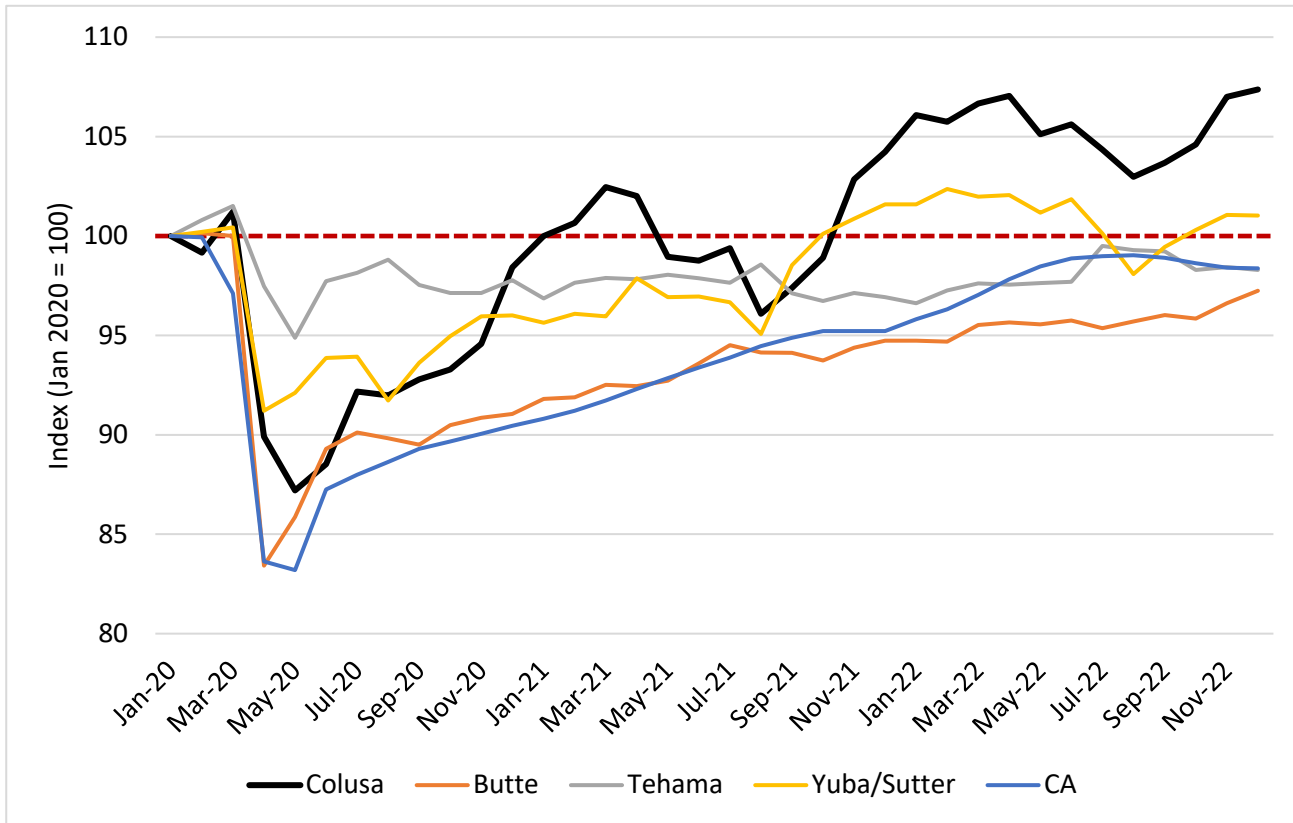
Continued Claims for Unemployment Insurance, Selected Counties and CA, Total Claims Index Jan 2020 = 100 to Dec 2022



Colusa was more resilient in terms of residents working during the depths of the pandemic recession (fewer claims for unemployment insurance).

However, there has been a recent, small increase following broader trends of job losses.

Jobs at Colusa County Employers, Compared to Selected Counties and California, Index, Jan 2020 = 100, Jan 2020 to Dec 2022

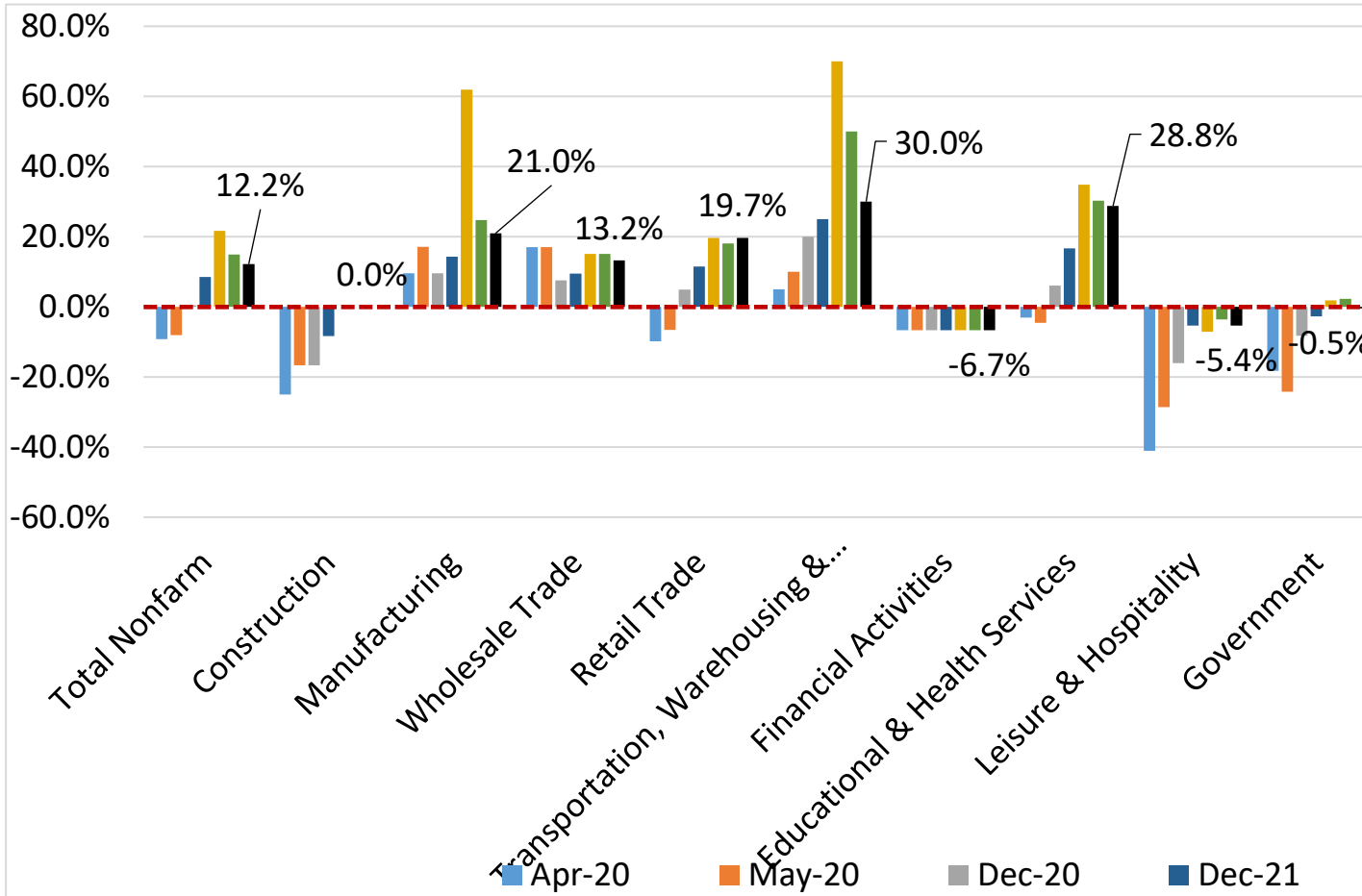


These data are jobs at local employers.

Colusa again showed regional strength here in terms of local employers providing jobs.

Commute data is the missing link (only officially available to 2019).

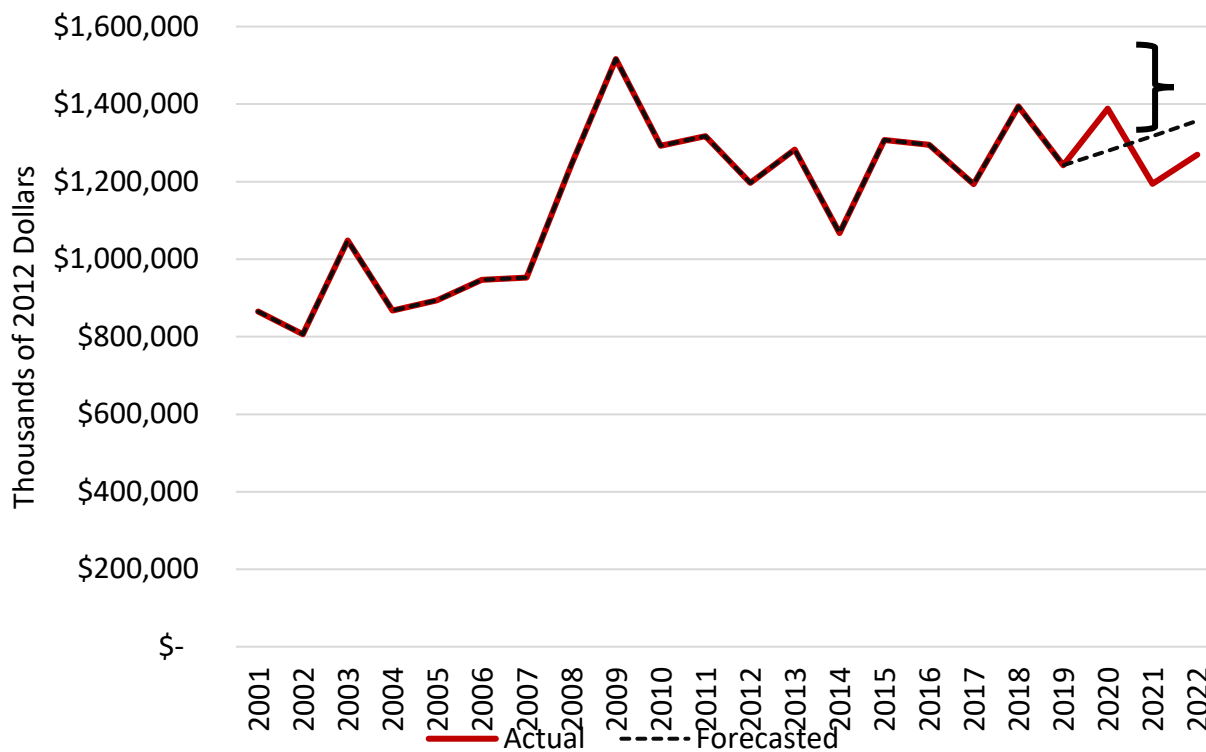
Changes in Employment by Industry, Colusa County, Compared to Jan 2020 as of Dec 2022, % Change in Jobs



These data show Colusa County has seen growth across its major industry sectors since the pre-pandemic benchmark (January 2020).

Finance, banking, insurance and real estate hiring has remained stable after the initial losses, where leisure and hospitality has recovered early losses, but now be at a stable level.

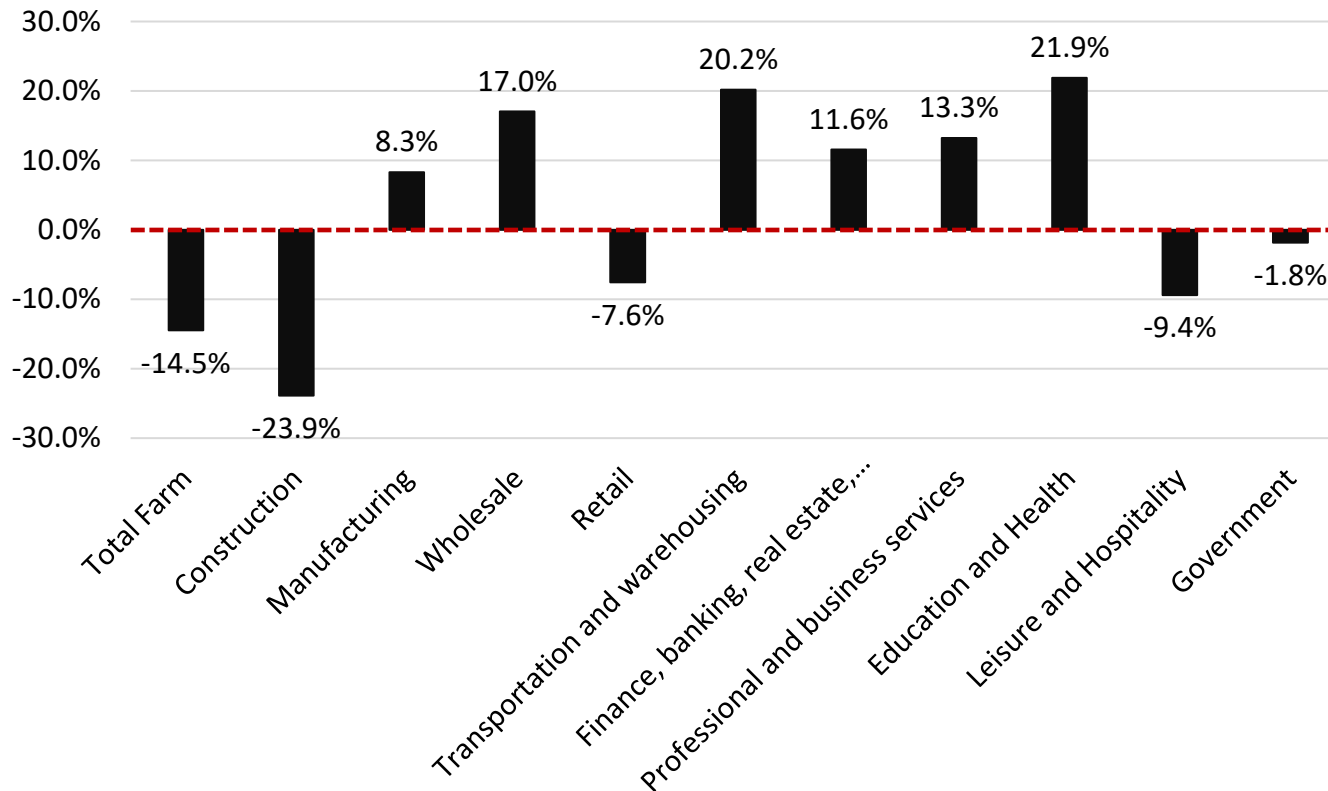
GRP Regionally: Where Are We? Real Gross Regional Product (Thousands of 2012 Dollars) 2007 to 2022 (Estimated) and if COVID-19 Had Not Happened (Estimated)



Major points here:

1. It was in 2021 that Colusa County experienced a shock from the pandemic, and that was likely inflation-driven more than productivity.
2. The black, dotted line is the forecast has the pandemic not happened.
3. The red line represents the actual data and a forecast for 2022 given jobs growth and lingering inflation that increased in 2022.

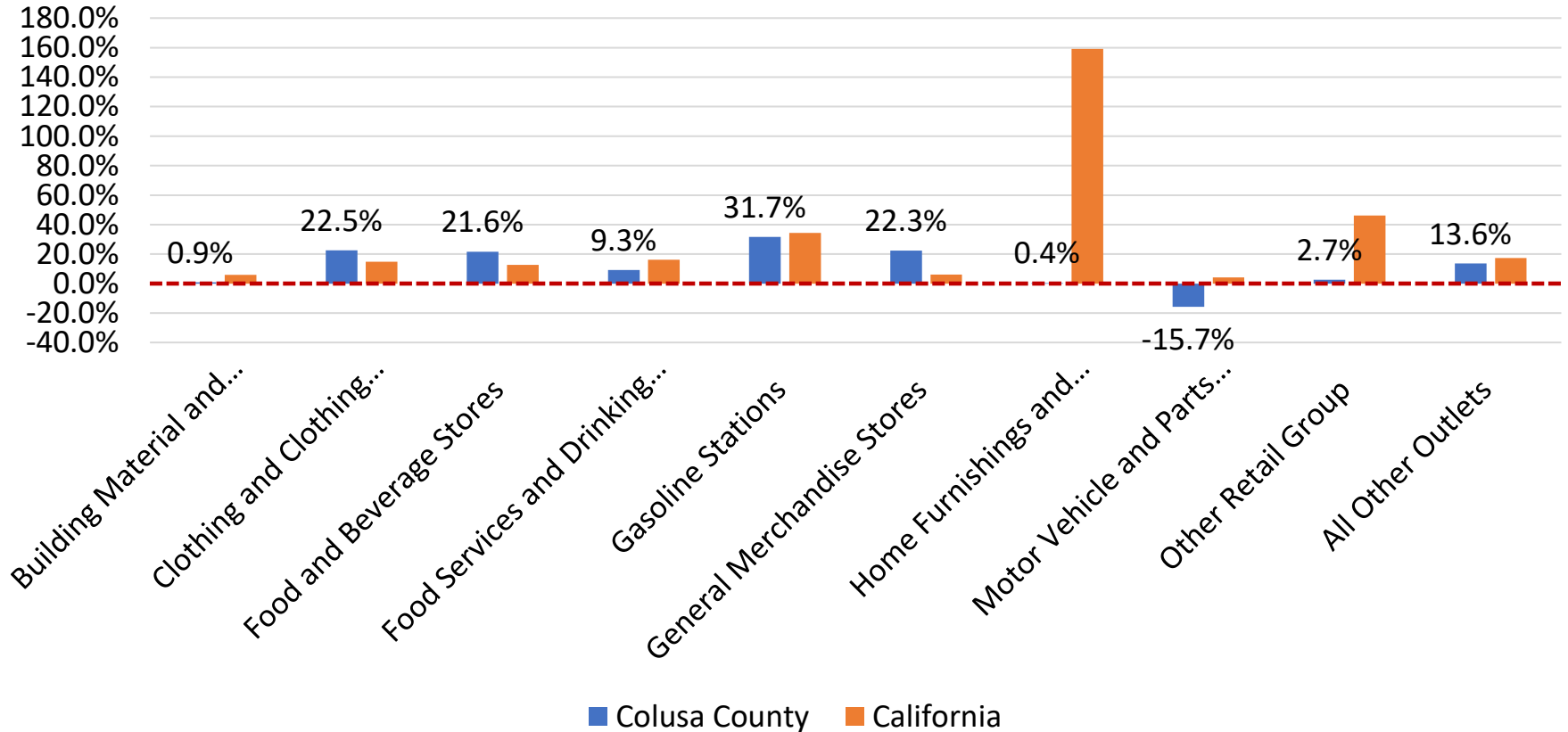
GRP by industry, Thousands of 2012 Dollars, Colusa County, % Change from 2019 to 2022



Gaps follow industry job losses, but losses less pronounced than jobs due to household fiscal stimulus and PPP:

1. Most industries in Colusa County have seen incomes increase since 2019 (pre-pandemic).
2. Construction jobs have just recovered in 2022 from the original shock from the pandemic.
3. Farm incomes have fallen most likely due to a mix of drought, inflation, and harvest issues.
4. Retail reductions are likely due to some businesses being lost and inflation

Taxable Sales, % Change Q3 2019 to Q3 2022: Raw Dollars (Not Inflation Adjusted)



Note: "Other Retail Group" includes primarily internet sales taxed locally but not fitting an industry group

Colusa in its Regional Context: Good News Generally

Colusa has shown resilience and growth since 2020

- May be based on population change and working families coming to Colusa
- May be that essential businesses remaining open in 2020 provide foundation for recovery and expansion

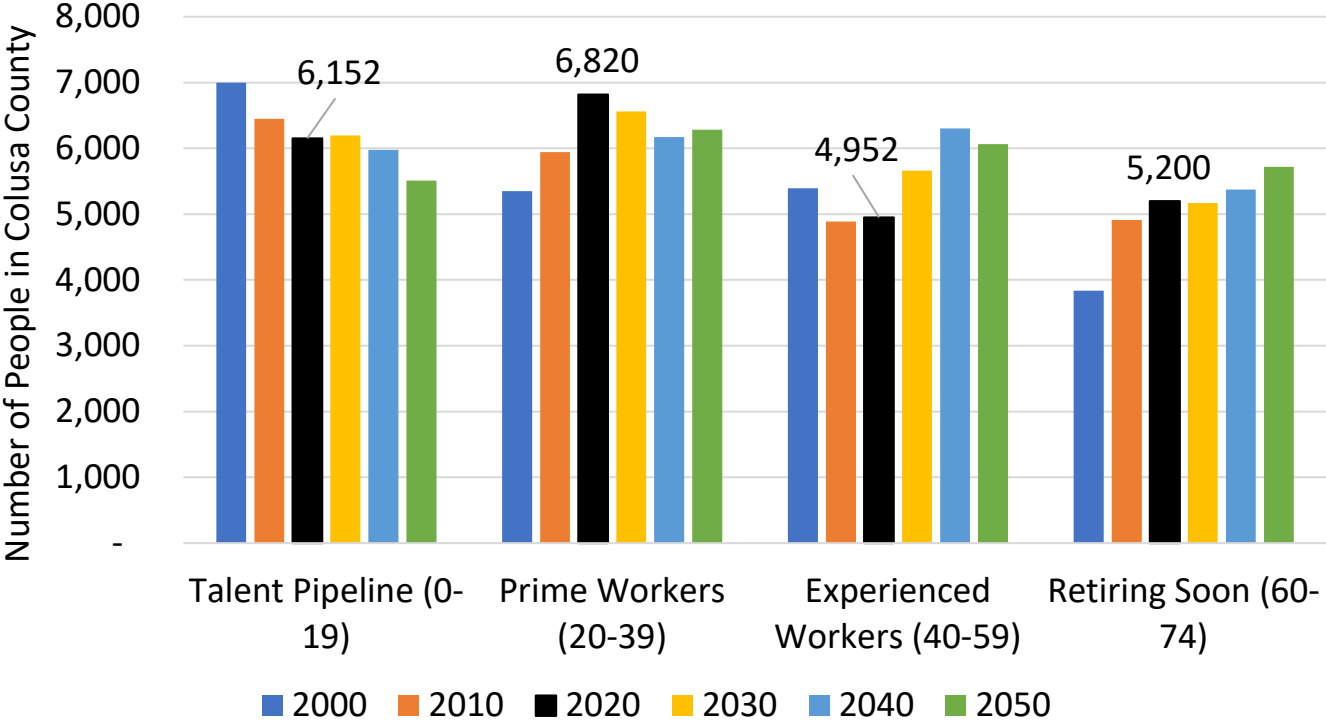
National and State Forecasts and context

- Inflation fading with the cost of higher interest rates (though interest rates are up, their levels are not closing in on double digits for 30-year mortgages)
- US and California labor markets showing signs of continued strength, though jobs losses being announced here and there
- Continued political uncertainty in both US and globally may affect financial markets more than labor markets
- Construction likely slower in 2023 and 2024 after amazing 2020-2022 period, due primarily to rising costs of construction and interest rates
- Agriculture may get some relief from recent rainfall, but drought not over, and rising commodities prices a mix of effects on farmers

The Future:
Labor Market and Housing Forecasts

Thinking about Workforce Development

Labor Force in Colusa County, 2000-2050

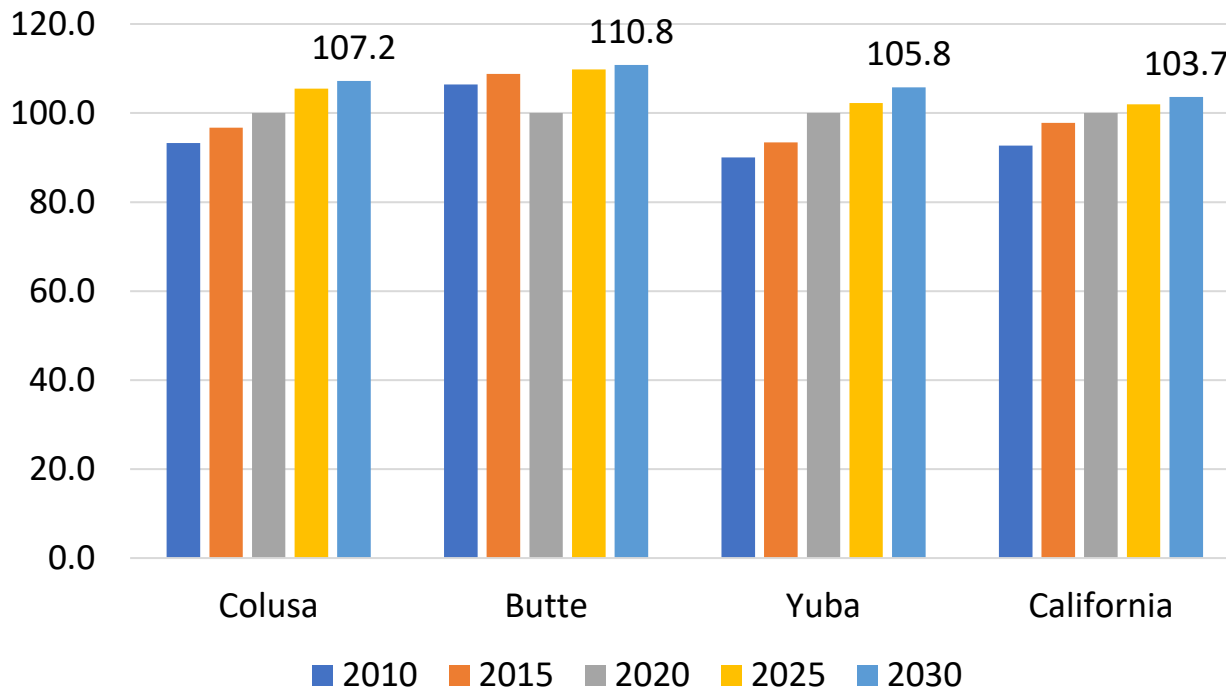


- Labor Force can be seen as having four components:
- Talent Pipeline (really about working families in the area)
- Prime Workers, including new HS and college grads and college students
- Experienced Workers (parents of the talent pipeline)
- Retiring Soon (more senior workers)
- Loss of Talent Pipeline suggests demographic change in many ways

Sources: California Department of Finance and EFA

Labor Force (LF) Actuals and Forecasts, 2010-2030

LF Defined as Pop Aged 18 to 74, Aggregated by County and compared to CA, Jan 2020 = 100

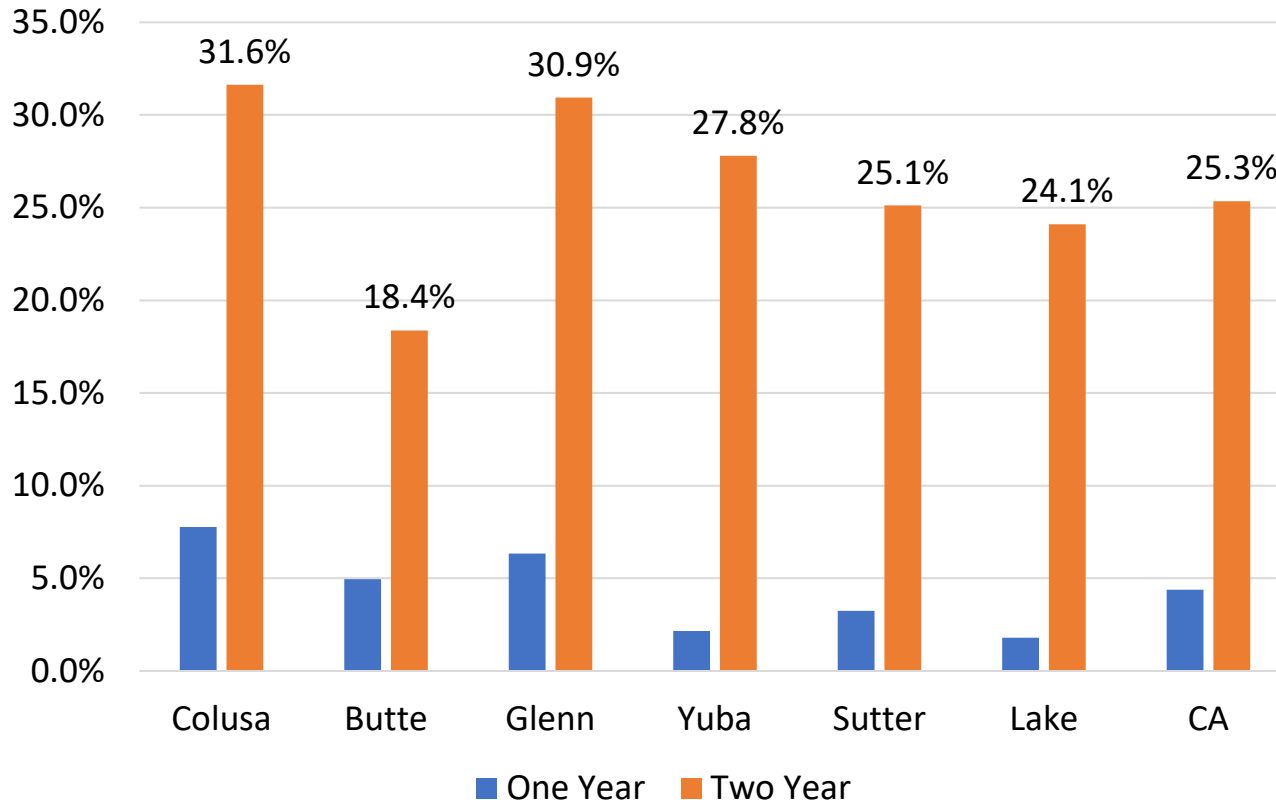


Colusa Labor Force predictions are following statewide forecasts versus Butte County.

2018 fire in Butte County and subsequent migration patterns remain an issue in Butte County's labor market.

Migration to Colusa County likely to continue to provide workers to 2030, as it ages slightly slower than before 2020.

Housing Market: % Change Median Home Price Looking Back One Year and Two Years, from December 2022



Colusa County Median Home Price, Dec 2022:

\$362,880

Dec 2019 = \$268,105

Dec 2022: Median \$

Butte \$414,100

Glenn \$363,000

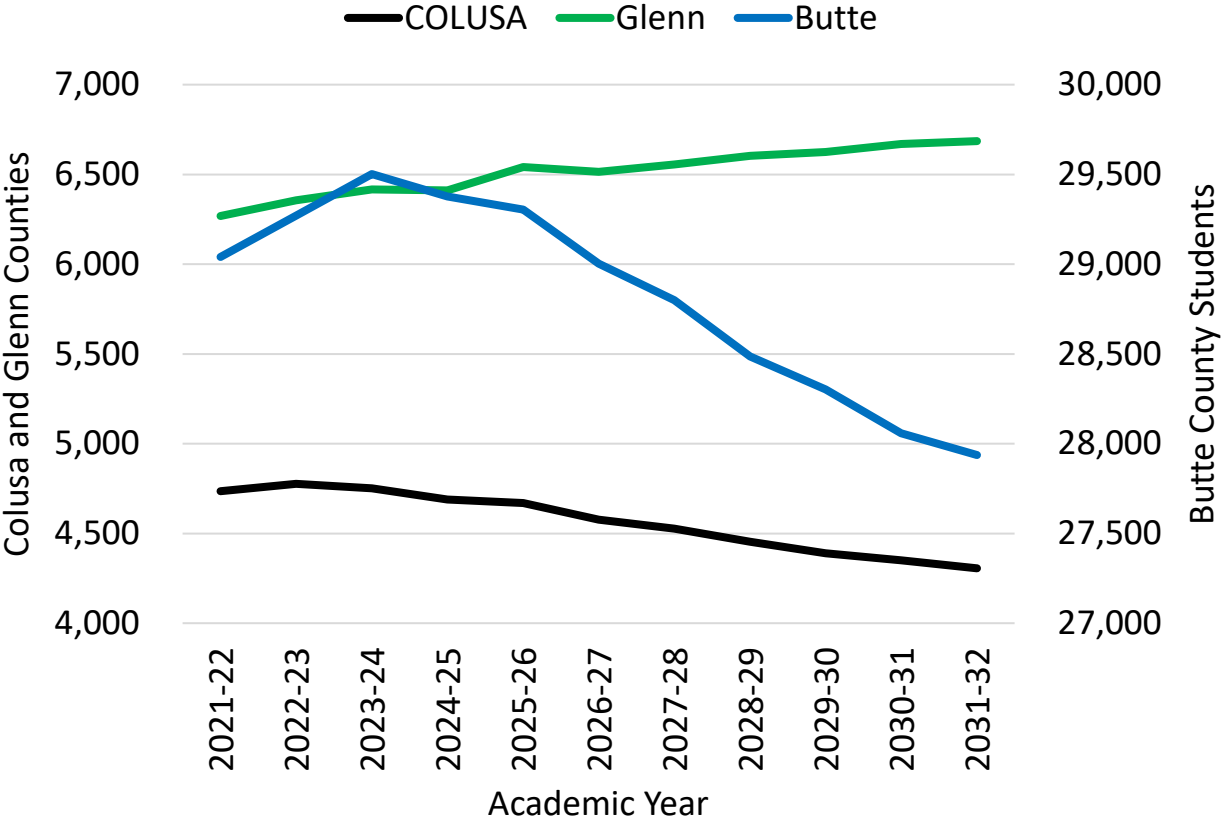
Yuba \$400,100

Sutter \$442,100

Lake \$340,400

CA \$760,600

K-12 Attendance Forecast



Colusa County drop approximately 9% over 10 academic years

- Butte County = -3.8%
- Glenn County = +6.7%
- Yuba County = +7.2%
- Sutter Count= +21.3%
- California = -8.9%

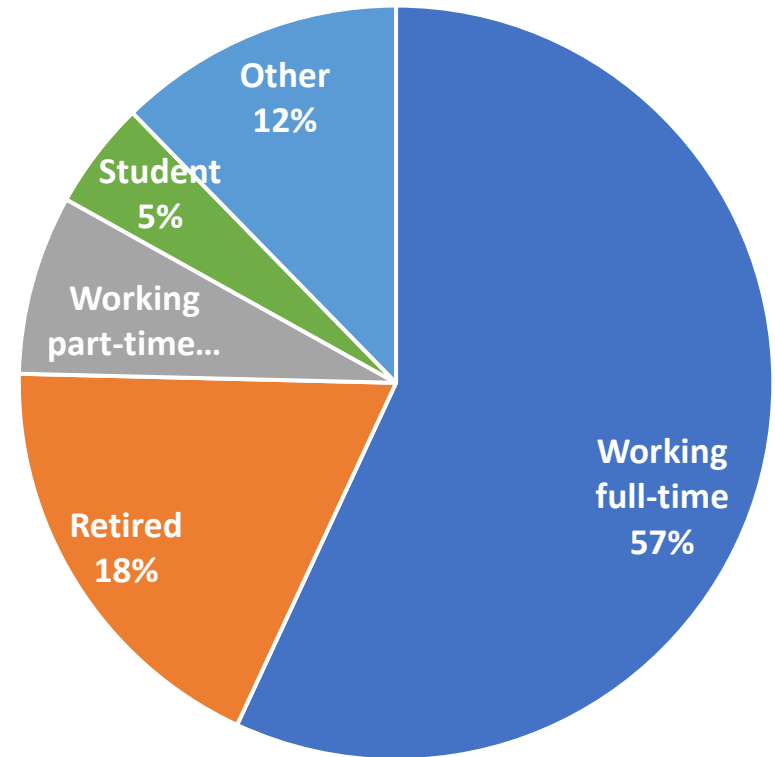
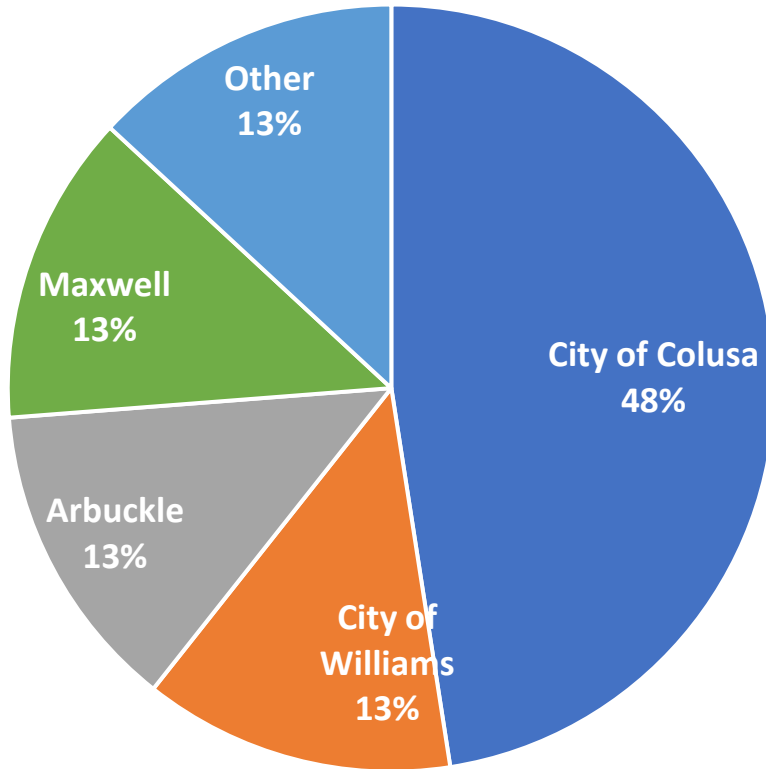
The drop for Colusa a function of an aging population, the predicted % change in Butte County is similar to Colusa, but many more workers.

Sources: California Department of Finance and EFA

Initial SWOT



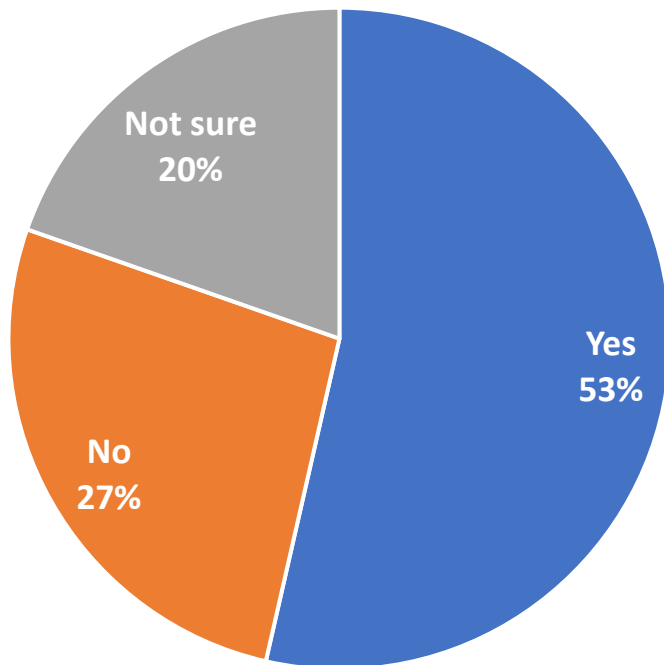
Demographics of Survey Participants



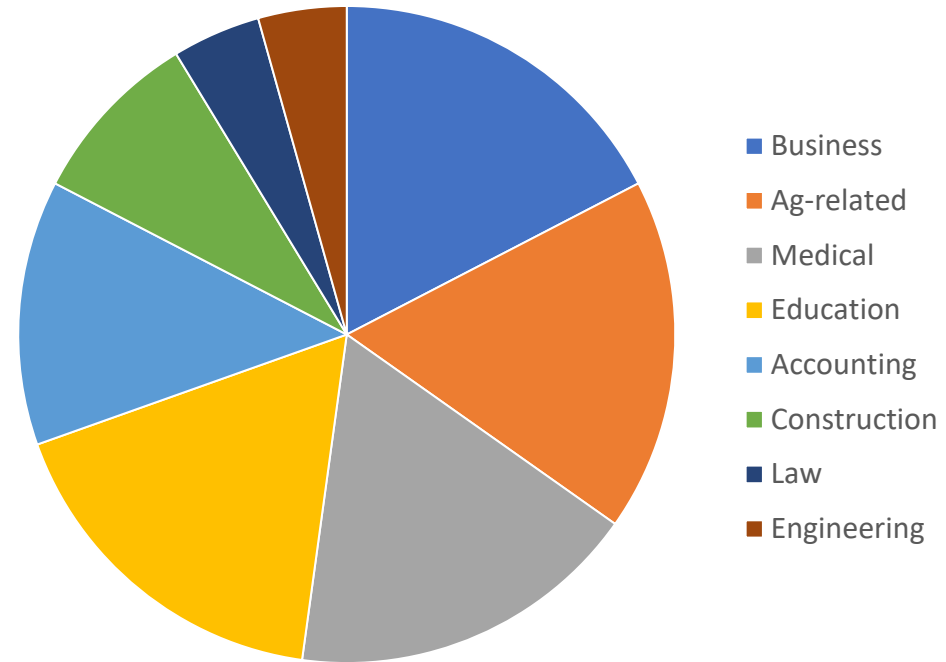
61% commuting less than 30 minutes

Underemployment

Do you have work experience or special training that qualifies you for a better-paying job than the one you currently have?



Areas of Studies



Assets & Opportunities

*Numbers are for reference only,
do not reflect priority*

1. Small town, safe, rural atmosphere
2. Downtown charm, local businesses
3. Sacramento River, Nature Preserve, open space
4. Community events, parks, theater
5. Playground, community pool
6. Historic, craftsman style homes
7. Courthouse
8. Ag and livestock industry
9. Smart growth, allow change
10. More public access to state and federal land for rec
11. Encourage cultural diversity



Challenges

*Numbers are for reference only,
do not reflect priority*

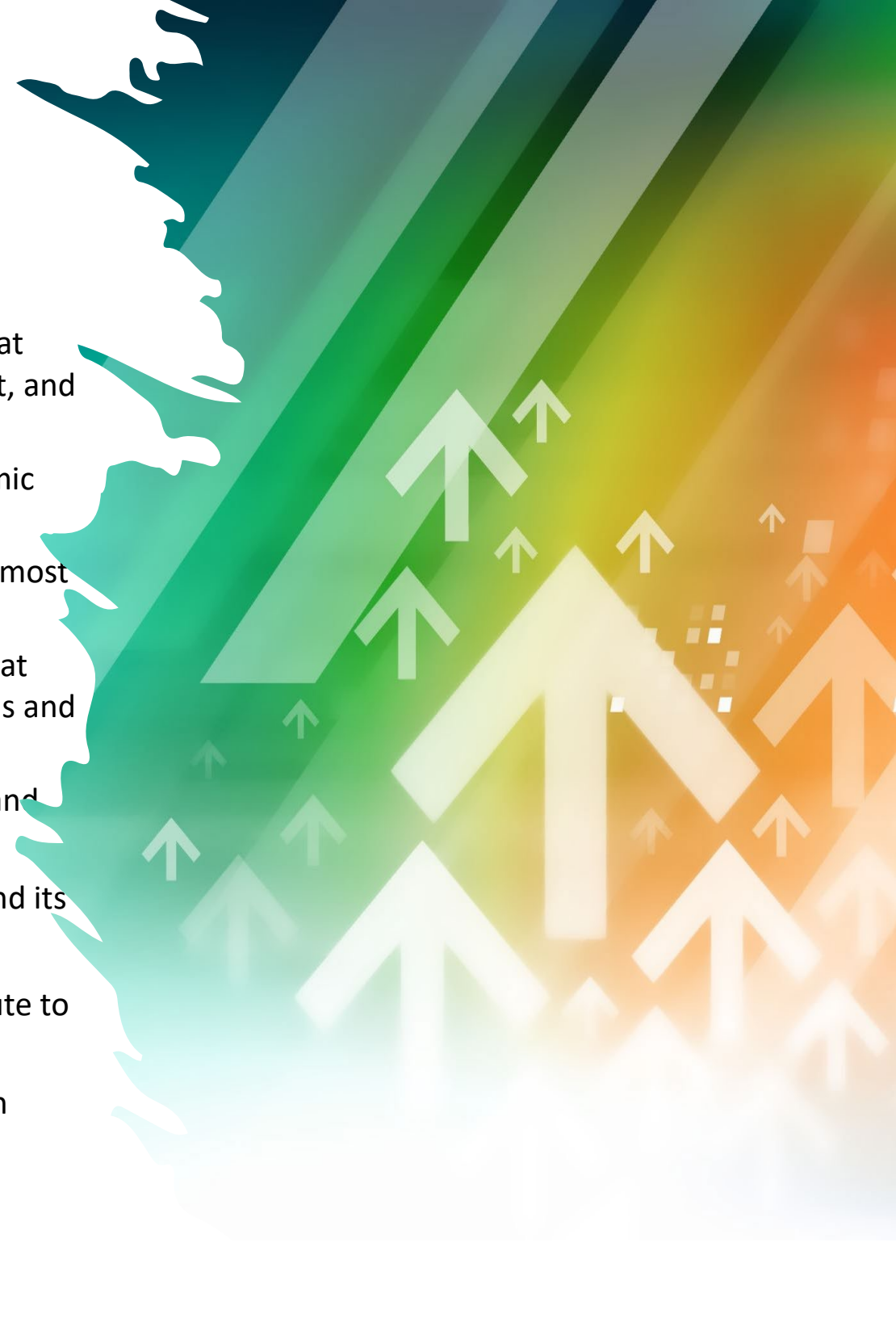
1. More and diverse industries including tourism, recreation, manufacturing, supporting ag industry
2. More jobs and better-paying jobs
3. Retain population
4. Housing, affordable options
5. Water, storage & flood protection (for ag & recreation)
6. Infrastructure, roads, broadband & cell service
7. Regulations, costs
8. Retail leakage, big box competition
9. Improve schools, expand curriculum, skills training
10. Municipal revenue stability
11. Clean-up, fix-up, noise control
12. Improve access to medical, senior services
13. Access to childcare
14. Homelessness



CEDS Goals

Compiled from Colusa County General Plan

1. Create sustainable long-term economic growth that provides high-paying jobs, reduces unemployment, and diversifies the county's economic base
2. Increase available resources to implement economic development strategies
3. Maintain and enhance agriculture as the county's most critical land use, economic sector and resource
4. Provide a multimodal road and highway system that supports the safe and efficient movement of goods and people to and from the county
5. Improve livability in the county through land use and transportation options
6. Protect the rural qualities that make the county and its communities distinct from others in California
7. Conserve and enhance the elements that contribute to a favorable quality of life
8. Increase opportunities for recreational activities in open space, in and around existing communities



Next Steps

CEDS TIMELINE	
MAR	<ul style="list-style-type: none">• Strategy Development• Capital Improvement Projects• Document Prep
APR	<ul style="list-style-type: none">• Monday, April 10 @ 9:00 a.m.• Draft CEDS - Committee Review• Draft CEDS - Public Review
MAY	<ul style="list-style-type: none">• Possible Public Revisions• Deliver to EDA for 30-day review• Possible EDA revisions

Thank You!



Colusa County CEDS Committee

April 10, 2023 – Agenda

- Welcome & Introductions
- Why do another plan?
- Review & Comments
 - Resident & Worker Survey Results
 - S.W.O.T.
 - CEDS Goals
- Discussion
 - Existing Plans
 - Strategy Focus & Action Items
- Next Steps:
 - Development Areas
 - Capital Improvement Plans



CEDS Contents

Economic Conditions is a summary of the economic and socio-economic conditions of the county.

SWOT Analysis identifies the critical internal and external factors (assets, challenges, and threats) that affect the county's economic development potential. Along with the data analysis, findings from the SWOT lead to and support the strategic direction and actions that focus on leveraging strengths and opportunities, overcoming challenges, and mitigating threats.

Action Plan provides a level of detail to implement strategies and achieve goals. The Action Plan is organized around three components of a strong economic development program

- 1) Business Climate
- 2) Economic Competitiveness
- 3) Talent

Performance Metrics will assist the county in tracking the implementation and the impact the CEDS has on the local economy.

Reference Documents

Colusa County Drought Crisis (video documentary)

Colusa County General Plan (2030)

Colusa County Planning Projects (website)

Sites Reservoir (sitesproject.org)

University of California Cooperative Extension, Colusa (website)

City of Colusa General Plan (2007)

City of Colusa Comprehensive Economic Development Strategy (CEDS) (2020)

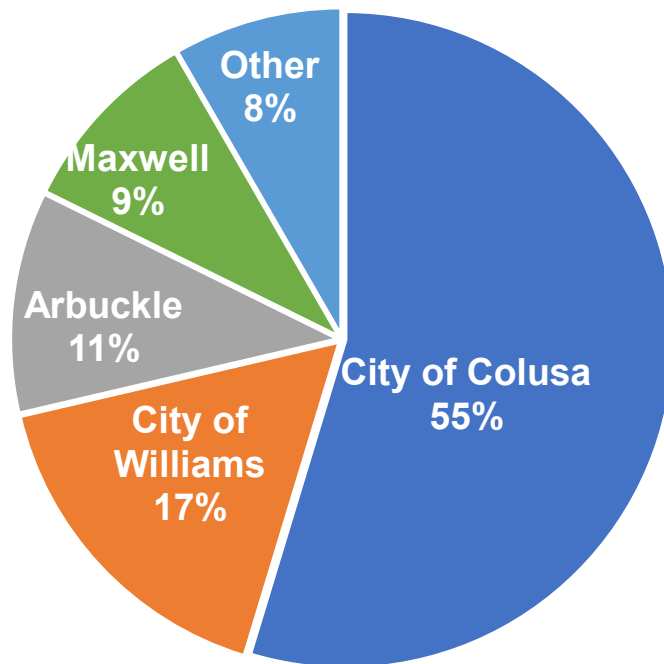
City of Colusa Downtown Development Plan (2012)

City of Colusa Civic Facilities Master Plan (2009)

City of Williams General Plan (2012)

Others??

Resident Survey - 192 Responses



Critical Challenges

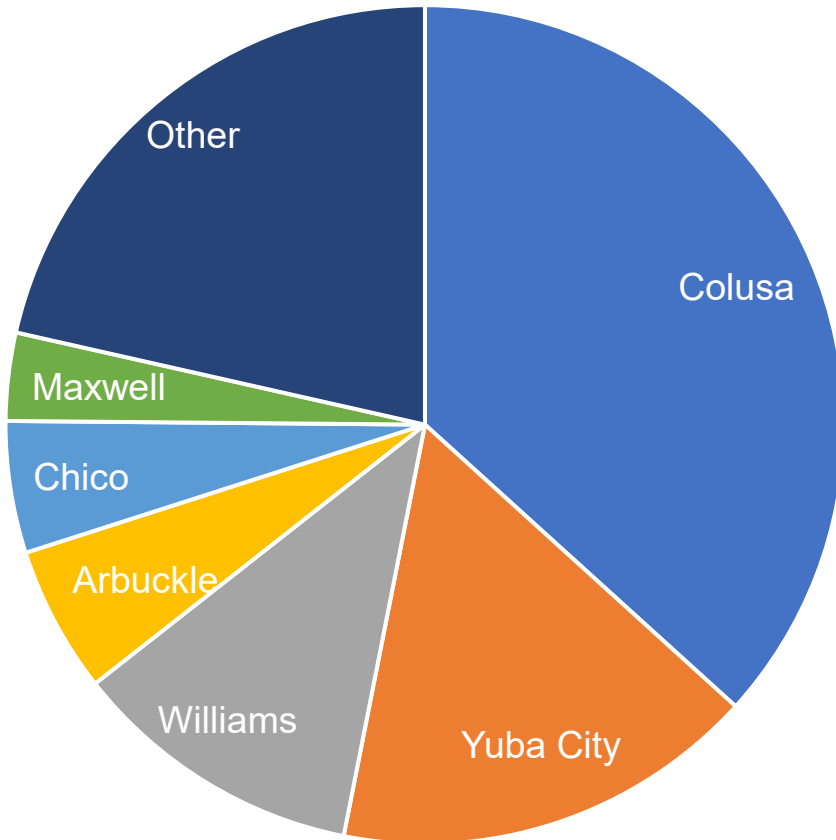
- Housing
- Better paying jobs
- Diverse industries
- Infrastructure
- Retail & services availability
- Water & storage
- Municipal revenues

Assets & Opportunities

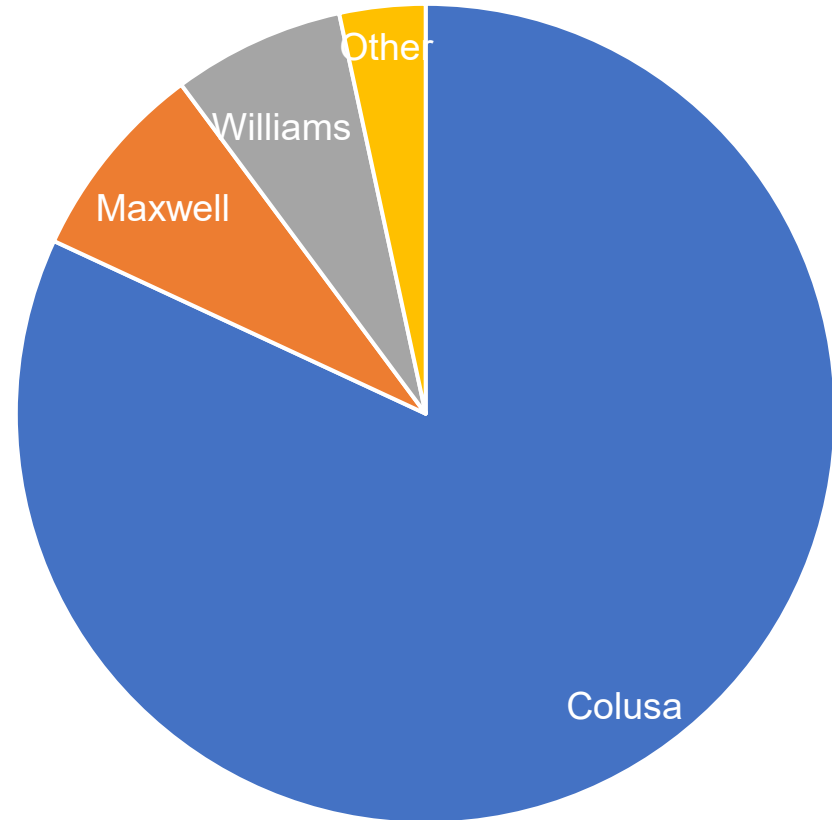
- Sacramento River, Preserves, Open Spaces (hunting, fishing, recreation)
- Ag Industry
- Downtowns, Historic Architecture
- Community Engagement

Worker Survey – 177 Responses

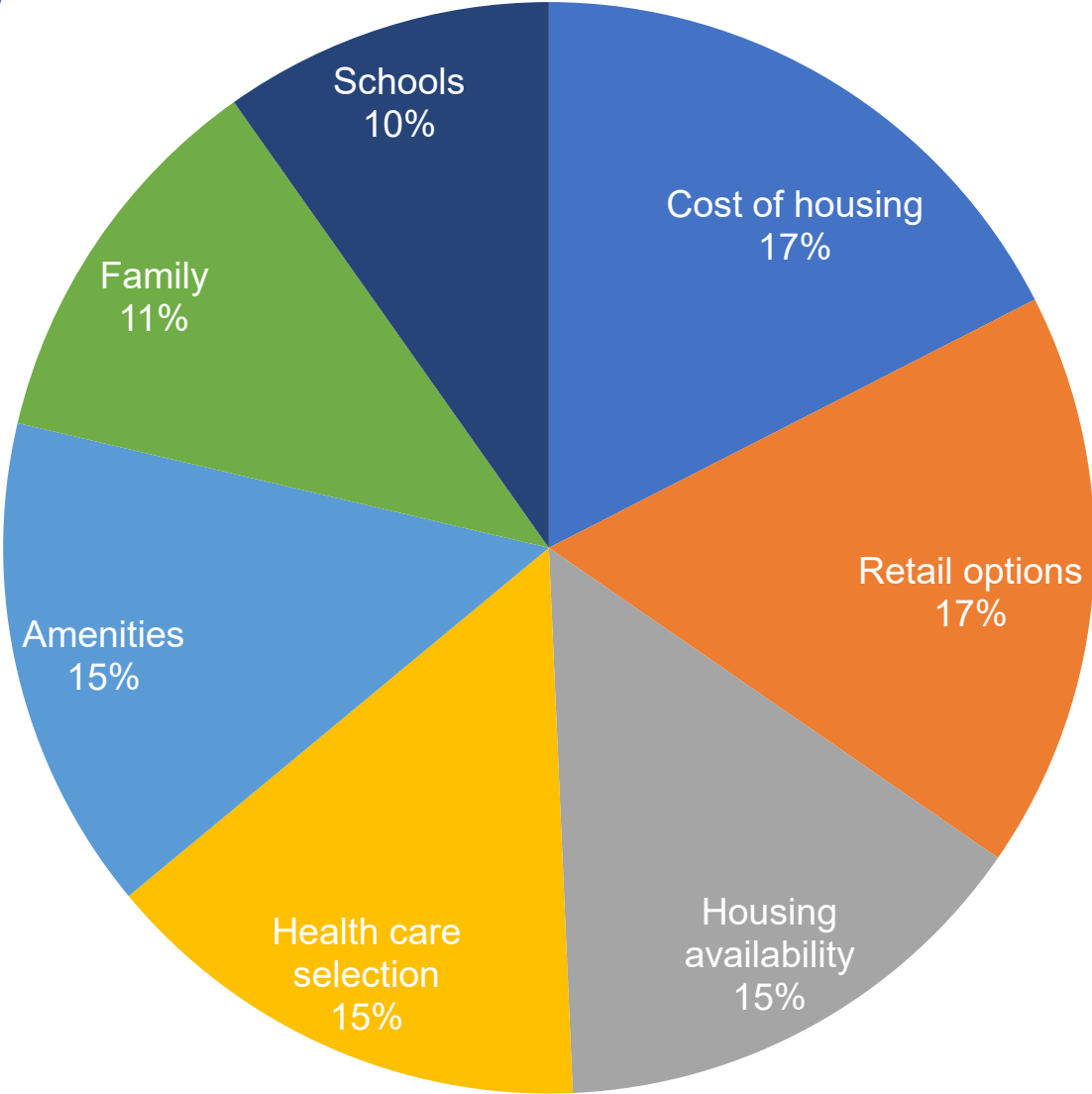
Where they live



Where they work



What is preventing you from making Colusa County your home?



STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Signs of recovery from pandemic; county regained its labor market and jobs ahead of neighboring communities and most industrial sectors show recovery • Central location and access to metro markets via interstate and state highways • Median age is younger than state (35 vs. 37) • More affordable cost of living compared to state and nation • Growth in median home prices; can also be considered a challenge for new home buyers • Access to outdoor recreation venues • Community engagement 	<ul style="list-style-type: none"> • Population and talent pipeline growth historically flat; ages 0-19 declining, older population growing • Declining K-12 enrollment • Little diversity, but a significant Hispanic population • Source of income from wages declining; SS, SSI & public assistance increasing • Population with H.S. education attainment increased slightly but higher levels of education flat • Economic base is weighted to population-serving industries vs. traded sector • Critical infrastructure needs (roadways, broadband, downtown improvements) • Economic development resources to support implementation, e.g., staff, funding 	<ul style="list-style-type: none"> • County's location and ag industry may support expanding food manufacturing and distribution • Sustainable and experimental ag research, production, processing (UCCE) • Energy production, distribution, research • Existing venues could be further leveraged to support a more robust visitor industry (waterways, nature preserve, casinos, restaurant, history) • Industrial and housing development sites • Sites Reservoir 	<ul style="list-style-type: none"> • Natural disasters e.g., wildfires, drought, flooding • Economic shifts • Inconsistent performance of the county's primary industry (agriculture) due to rising costs, weather, supply chain issues, available labor

CEDS Goals

1. Diversify the county's economic base to secure and maintain long-term economic growth and provide living-wage jobs for current and future residents while preserving and enhancing agriculture, the county's primary economic sector and resource.
2. Increase resources to implement economic development strategies and to improve and maintain the physical and social infrastructure that supports safe and healthy communities.
3. Preserve and balance the county's rural values with improvement of social, cultural, and natural assets.



Strategic Direction

- **Enhance Business Climate**—a proactive and collaborative approach to financing, and implementing economic development programs and strategies that support innovation and business growth
- **Improve Economic Competitiveness**—placemaking, financing public services, upgrading and expanding infrastructure to support business development and a safe and healthy standard of living
- **Cultivate Talent**—developing, retaining and attracting a skilled workforce



Action Plan – Enhance Business Climate

A proactive and collaborative approach to financing and implementing economic development programs and activities that support innovation and business growth

For discussion:

- Restart the multi-jurisdictional economic development meetings, expand membership with workforce development, small business partners
- Implement a solution to monitoring & manage goal achievement; e.g. Software technology as necessary
- Collaborate on grant funding applications and implementation
- Engage with the Butte College Small Business Development Center (SBDC) to establish a regular presence and office space in the county and cities thereby expanding services to start ups and small businesses, increasing access to local goods, services, and employment opportunities
- Collaborate on business visitation program - underway

Action Plan – Economic Competitiveness

Placemaking, finance public services, upgrade and expand infrastructure to support business development and a safe and healthy standard of living

For discussion:

- Encourage and support current and future development with necessary infrastructure and assistance
- Move forward with planned capital improvement projects for industry and housing
- Make downtown improvements to support resident, worker and visitor experiences (sidewalks, pedestrian amenities, parks) Enhance downtowns with entertainment venues, pedestrian amenities
- Revisit / move forward with hiking/bike path, parks and rec plans

Development Projects / Sites

- California Renewable Carbon
- Janus Solar PV, LLC
- Colusa Industrial Park
- Downtowns
- Sites Reservoir
- Interstate 5 sites
- New ag and ag-related, other industry industrial park (to attract)

Action Plan – Cultivate Talent

Develop, retain and attract a skilled workforce

For discussion:

- Strengthen the network of organizations that address workforce and training by regularly collaborating with schools, workforce, colleges, and businesses on skills requirements and training programs
- Work with schools and employers to implement programs for mentoring and job shadowing

Next Steps

- Identify Priority Development Areas
- Collect Capital Improvement Plans
- Add Details and Finalize Document

