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S A N J O A Q U I N P A R T N E R S H I P



SAN JOAQUIN PARTNERSHIP

Chairmen



Photo courtesy: Rich Turner

Robert K. Wheeler
1991 – 2007



Robert Kavanaugh
2007-2009



Kevin Huber
2009 – 2015



Bob Gutierrez
2016

Board of Directors 2017 Officers

Bob Gutierrez
Food 4 Less
Chairman

Susan Dell'Osso
The Cambay Group
Vice Chairman

Lewis Gale, Ph.D.
University of the Pacific
Secretary / Treasurer

Founders

Bank of Stockton
A. Teichert & Son
F & M Bank
General Mills
Greater Stockton
Chamber of Commerce
The Grupe Company
Port of Stockton
University of the Pacific
San Joaquin County
City of Lodi
City of Manteca
City of Ripon
City of Stockton
City of Tracy

Major Contributors

A. G. Spanos Companies
ABC NorCal
City of Lathrop
CT Realty
Food 4 Less
Grupe Commercial
Company
Northern California
Chapter NECA
Pacific Gas & Electric
Company
The Cambay Group

San Joaquin Partnership Staff

Michael S. Ammann
President & CEO

Christine Barnesberger-Youngsma
Office Manager

Brad Ecker
Client/Network Administrator

Mission Statement

Lead a cooperative countywide competitive economic development partnership that improves the economy and quality of life by attracting investment that results in new jobs.



ECONOMIC IMPACT

New Locations & Expansion

Wins List	Sq. Ft.	Jobs
Refinishing Group, Inc.	64,000	10
PrimeSource Building Products	129,960	25
Penske Truck Leasing	14,438	2
Griffin Soil Group	44,640	5–10
Targa Terminals	4,400	12 (+ Truck Drivers)
PG&E Training/Call Center (Assist)	137,840	450 Retained
Cepheid (Exp/Ret/Assist)	73,954	40–270
Oakland Pallet Company, Inc.	44,674	30–40
Best Express Foods, Inc.	102,350	300
Valley Snack Foods, Inc.	23,680	10–24
Air Transport International (PrimeAir)	25,800	200
Le Tote	150,000	175

Definitions for Economic Impact

Direct Impact: Estimated results from the operation of the business in the analysis

Indirect Impact: Estimated results from the suppliers and purchases made by the business

Induced Impact: Estimated results from household spending at local businesses—retail, health & personal—by new employees

SUMMARY TABLE OF ANNUAL ECONOMIC IMPACTS FROM SAN JOAQUIN PARTNERSHIP CLIENT ACTIVITIES, 2016 JOB WINS AT BUILDOUT

Economic Impacts	Direct	Indirect	Induced	Total
Employment	983.0	466.2	905.8	2,355.0
Total Industry Output	\$368,029,892	\$82,638,618	\$106,848,291	\$557,516,802
Labor Income	\$63,081,592	\$23,309,280	\$45,076,797	\$131,467,669

Source: Applied Development Economics, Inc., multiplier data from IMPLAN input-output model.

SUMMARY TABLE OF ANNUAL ECONOMIC IMPACTS FROM SAN JOAQUIN PARTNERSHIP CLIENT ACTIVITIES, 2016 JOBS RETAINED

Economic Impacts	Direct	Indirect	Induced	Total
Employment	450.0	153.8	257.4	861.3
Total Industry Output	\$85,130,345	\$26,269,948	\$30,354,788	\$141,755,081
Labor Income	\$18,060,772	\$6,370,952	\$12,822,650	\$37,254,374

Source: Applied Development Economics, Inc., multiplier data from IMPLAN input-output model.

PARTNERSHIP BOA

EXECUTIVE COMMITTEE



**Chairman
Bob Gutierrez**
Government Affairs
Food 4 Less



**Vice Chairman
Susan Dell'Osso**
President
The Cambay Group



**Secretary/Treasurer
Lewis Gale, Ph.D.**
Dean
Eberhardt School of Business
University of the Pacific



**Committee Member
David Nelson**
Sr. Vice President
Land Development
A.G. Spanos Co.



**Committee Member
Bob Johnson**
Council Member
City of Lodi

BOARD OF DIRECTORS



Greg Armstrong
Executive Director
Northern California
Chapter – NECA



Richard Aschieris
Director
Port of Stockton



Michele Daugherty
President & CEO
ABC Northern California



Steve DeBrum
Mayor
City of Manteca



Mary-Elizabeth Eberhardt
Vice President
Bank of Stockton



Bob Elliott
Board of Supervisors
San Joaquin County



Carter Ewing
Managing Partner
CT Realty



Bob Harmon
Senior Vice President
& Stockton Area Manager
Farmers & Merchants Bank
of California (F&M)



Kevin Huber
President
Grupe Commercial
Company



David Meier
Pacific Gas &
Electric Company
Senior Manager,
Local Customer Experience

R D O F D I R E C T O R S

BOARD OF DIRECTORS



Jake Parks
Council Member
City of Ripon



John Quinn
President
Food 4 Less Stores



Robert Rickman
Mayor
City of Tracy



Stephen Salvatore
City Manager
City of Lathrop



Michael Tubbs
Mayor
City of Stockton



Doug Wilhoit
CEO
Stockton Chamber
of Commerce





THE CORPORATION

Congratulations Team San Joaquin!



Michael S. Ammann
President & CEO



Christine Bamesberger-Youngsma
Office Manager



Brad Ecker
Client/Network Administrator

In last year's letter I discussed the upward trending local economy and the positive signs of growth which is now powering new business expansions and locations that have decreased the unemployment rate from a high of 18% in 2011 to 7% in 2016. The recovery is now complete.

This robust economic expansion can be credited to the staffs of San Joaquin County and its seven communities planning ahead during the recession while working with property owners to zone, entitle and

attract developers/contractors to build spec industrial, logistics and commercial buildings. The result is San Joaquin County has now completed or has under construction over 19 million sq. ft. of new buildings since 2013. Not including temporary construction jobs, these 46 new buildings will house 9,000 new jobs.

In addition to buildings, San Joaquin County now has the largest industrial park and biggest spec building project in Northern California. Prologis International Park of Commerce, a 1800 acre fully entitled, master-planned industrial/logistics park located in Tracy as well as the largest spec industrial building project of 1.7 million sq. ft. in 3 buildings now under construction in Stockton at NorCal Logistics Park will continue the attraction of new employers in the next 10 years.

Development like these has made San Joaquin USA the go to location for expanding businesses with the Nor Cal Mega Region. San Joaquin USA is rapidly becoming the new employment center for the Northern San Joaquin Region by providing both a job and a home for growing families.

What's driving this growth? One major technology trend is online purchasing and the growth of the logistical e-commerce supply. Of course the location of Amazon in January, 2013 started this trend and has made transportation and logistics the fastest growing industry in San Joaquin County. Amazon has absorbed over 2.6 million sq. ft. in 3 buildings and has established a major air cargo hub at Stockton Metro Airpark with daily flights by three Prime Air 767 aircrafts. Meanwhile UPS, FedEx, Medline and others have followed Amazon's lead with completion of major expansions over the past 4 years. In the future 3-D and additive manufacturing processes will move into these E-fulfillment supply chain centers.

A second major trend is the regional location of autonomous electric vehicles R&D, manufacturers and suppliers. Company facilities are locating from Fremont to Sparks, NV and down the Central Valley to Los Angeles. Of course, Tesla began renovations on a 431,000 square foot facility that was once utilized by Daimler-Chrysler as a distribution center in April 2014 and has continued to expand since then. Suppliers will follow.

All traditional local businesses including agriculture, food processing, specialty manufacturing and traditional warehousing are following this technology trend rapidly adopting advances to stay competitive and to access new markets with product and service adaptations.

In closing it's important to keep our teamwork and business friendly welcome mat out to attract new employers that will bring higher paying jobs. As major employers in the Bay Area and Silicon Valley face higher costs of doing business, commuter congestion and limited land and buildings they will look at our opportunity to put jobs adjacent to affordable housing in San Joaquin USA.

TIME. MONEY.

And how the Port of Stockton
helps your business save on both.

SHIP INLAND. SHIP STOCKTON.

Delays can be costly. You won't find them at the Port of Stockton. We're a centrally located, 35-foot deep-water port with none of the congestion and waits that typically conspire to slow you down. And with direct access to rail, freeways, distribution, and storage, your cargo keeps moving fast. And forward. Learn why the Port makes sense for your business.

portofstockton.com
209-946-0246



Port of Stockton
CALIFORNIA

Chair Elizabeth Blanchard, Vice-Chair Michael Patrick Duffy. Commissioners Sylvester Aguilar, R. Jay Allen, Gary Christopherson, Stephen Griffen, Victor Mow. Port Director Richard Aschieris.

HIGHLIGHTS OF THE OCTOBER 2017 CALIFORNIA FORECAST

- Over the next 12 months, real gross state product is forecast to grow 2.9% and the risk of recession is low.
- The California unemployment rate is about 5% and is forecast to stabilize just below 5% for the next three years. The labor force and number employed are projected to grow at 1% annual rate through 2020.
- Nonfarm payroll jobs will grow 1.5% over the next 12 months, about half the pace of the previous four years when job growth was between 2.5% and 3%. Payroll growth will decline further to 1% by 2020, which is to be expected for an economy near full employment.
- Health Services has become the largest employment sector in the state, and is projected to add about 40,000 positions over the next 12 months, less than the 65,000 jobs added in recent years.
- Professional Scientific & Technical Services is a high-paying sector that has fueled the recovery. Growth in this sector will slow to 22,000 jobs over the next year compared to over 50,000 in some recent years as Silicon Valley growth cools.
- Growing tourism and a gradual shift in consumer spending from retail to restaurants has fueled rapid growth in Leisure and Hospitality sector. However, this sector's growth is slowing to 30,000 new jobs over the next 12 months, and will drop below 20,000 new jobs by 2020 as higher minimum wages lead to slower hiring.
- State and local government employment will be one of the slowest growing sectors, projected at about 0.5% job growth over the next several years as state and local governments grapple with rising pension costs.
- Construction activity continues to grow with about 35,000 new jobs anticipated in each of the next three years, about a 4% annual growth rate.
- Single family housing starts are picking up, growing from 50,000 units in 2016 to a projected 60,000 in 2017 and 78,000 by 2020. Multi-family production is projected to exceed 50,000 units in 2017, and reach 60,000 units by 2021. Despite this improvement, housing production will be insufficient to relieve the state's growing housing shortage.
- California's population growth rate has declined to 0.7% and is projected to remain below 1% due to lower birth rates, immigration, and housing costs. The state will add about 280,000 residents in each of the next few years, notably fewer than in the past.



MARKETING SAN JOAQUIN COUNTY

The primary mission of the San Joaquin Partnership is to lead a cooperative countywide competitive economic development team that improves the overall San Joaquin County, California economy by attracting private investments into our cities and county that will create new jobs.

The San Joaquin Partnership also assists local communities in expansion and retention of employers upon the community's or businesses request. In addition, we support educational opportunities that increase the skills of the labor force that will attract higher wage employers. Finally, the San Joaquin Partnership cooperatively markets the positive image of our county and its communities.

The following highlights the marketing program targets and results of the two brands over the first six months of 2017.

The 2017 Marketing & Outreach Program targets the following industries with examples of successful past target industry locations.

- Food Processing (Pearl Crop)
- Fulfillment /Logistics Centers (Federal Express Ground)
- Advanced/Specialized Manufacturing (Tesla)
- Construction Materials (Pace Supply)
- Medical Equipment & Supplies (Medline)
- Office/Professional Services/IT (Franklin Templeton)
- Agricultural Technologies (Agro-Culture Liquid Fertilizers)
- Energy Resources & Technologies (Community Fuels)
- Healthcare (Vibra Healthcare)

"Grow It! Make It! Ship It!" San Joaquin USA Brand

In 2017, the San Joaquin Partnership plan includes the continuation of retaining and growing new business investment relationships by marketing and selling cooperatively with GoBiz, TeamCA, California Central Valley Economic Development Corporation, Real Estate Professional Associations (SIOR, IAMC, NAIOP, and CoreNet) and several Site Consultant Forums.

Of course, face to face sales calls will continue with prospects, site consultants, incentives advisors as well as retention calls on corporate headquarters with locations in San Joaquin County. These sales calls are appropriately made before or after the following events, conferences and trade shows.

Conferences

- Industrial Asset Management Council - Tampa, FL
- SIOR Spring - New Orleans, LA
- International Economic Development Council - Toronto
- Team California Consultants' Forum – Ontario, CA
- CA Association of Local Economic Developers - CALED – San Diego, CA
- Select USA Washington DC
- Logistics Development Forum – Vail, CO
- CoreNet Fall - Seattle
- Area Development Consultants Forum - St Petersburg, FL

Industry Expositions/ Trade Shows

- Winter Fancy Food Show, San Francisco with CCVEDC
- Westpack Anaheim, CA - with Central Valley EDC

- Society of Industrial & Office Realtors – Nor Cal/So Cal Chapter Events
- SIOR SoCal Networking & Dinner
- SIOR SoCal Golf Tourney - Dove Canyon Country Club
- SIOR Northern CA Chapter Tahoe Dinner
- SIOR National Conference - Chicago
- SIOR NorCal Holiday Dinner - 2017

Missions & National Outreach

- Sacramento Legislative, GoBiz & Broker Calls with California Central Valley Economic Development Corporation (CCVEDC)
- Broker Mission - New York/NJ
- San Francisco Bay Area Calls with CCVEDC – Broker/Site Consultant Visits
- LA & Ontario Mission Calls with CCVEDC
- SoCal Newport/Orange - Broker/ Site Consultant Visits with CCVEDC

Greater Silicon Valley Brand

The Partnership under the management of part-time consultant Randy Starbuck has continued its collaboration with San Joaquin County and the communities to market into Silicon Valley using the "Greater Silicon Valley" brand which was created in 2013.

This marketing and sales call program partners with TiE Silicon Valley, Joint Venture Silicon Valley, California Technology Council and other organizations with the following primary goals:

- Attract new investment and expanding Silicon Valley startups, technology firms, manufacturers, suppliers and logistics companies into San Joaquin communities. Examples include Amazon and Tesla and its suppliers.

- Continue to connect San Joaquin County entrepreneurs and startups with Silicon Valley mentor services (TIE Silicon Valley), funding sources, and talent to hire while providing the opportunity to sell services and products into Silicon Valley.

Events, Exhibition & Outreach

- Joint Venture Silicon Valley - State of the Valley Conference (Santa Clara, CA - 10 local community representatives and marketing table hosted by City of Tracy, Cafe Coop & SJ Partnership)
- Annual TiECon Sponsorship/ Marketing Booth(Santa Clara, CA - (Cities of Tracy & Manteca community representatives & 3 startups)
- Gateway to Growth Marketing Insert - paper and digital (Supported by local communities, developers, airport, port and other advertisers). Paper insert in Silicon Valley Business Journal and San Francisco Business Times issues plus digital online placement on business journal's web sites. Paper overrun for community marketing distribution at events, conferences and prospect packages. Placed on San Joaquin Partnership's and Greater Silicon Valley web sites as PDF download.
- Multiple evening events, conferences and presentations within Silicon Valley, San Francisco and East Bay. Examples include the Churchill Club, California Technology Council - Economic Advisory Board member, Joint Venture Silicon Valley, and the Bay Area Council, THRIVE AgTech, Hardware Massive, FoodBytes, SME ~ Silicon Valley, Plug & Play and Keiretsu Forums.
- Weekly prospect visits to Silicon Valley, San Francisco and East

Bay (Oakland/Berkeley/Emeryville) accelerators, co-working centers and Innovation Hubs to introduce startup/young tech companies to San Joaquin business opportunities. First six months visited 10 startup facilities and met with 55 startup companies working in the logistics, manufacturing, construction, clean energy and agriculture/food processing sectors.

- Randy Starbuck began escorting city representatives to individual meetings with startup companies based on city staff availability (City of Tracy ~ June)

Business Retention & Expansion

Support Business Team San Joaquin, a collaboration of the San Joaquin County Economic Development Agency, community economic development leaders, EDD, and the San Joaquin Partnership. Business Team San Joaquin provides cooperative services to retain and grow local companies and holds informative bi-monthly team meetings. San Joaquin Partnership is on call to San Joaquin County Economic Development Agency and community economic development leaders to assist in retention and expansion of companies such as these past successful projects - Medline, Pearl Crop and TAP Plastics.

Retention calls are led by San Joaquin County Economic Development Agency and targets major employers, major retail sales generators and all expanding companies. San Joaquin County Economic Development Agency also is the response team that meets with companies closing or downsizing business operations and laying off employees.

Other Community Service Activities

In addition, Mike Ammann is involved in local community economic development planning and program discussions as commission member of the City of Stockton Development Oversight Commission, and the Stockton Metropolitan Airport Advisory Commission as well as a participant on the City of Lodi Brownfields Advisory Committee and an appointee of the project to connect ACE to BART with the Alameda-San Joaquin Regional Rail Working Group, along with being a founding member of the I Hub San Joaquin Board of Directors.



Is Silicon Valley innovation knocking on your door? How will your company answer?

Located less than 60 miles east of the Silicon Valley and the San Francisco Bay area, the City of Tracy is a growing community that offers a unique opportunity for your business to be active, innovative, and connected.

TRACY IS ACTIVE - Tracy offers a global supply chain with a strong economic base and exponential growth opportunities. Investor developers such as Prologis, DCT Industrial, Ridgeline Property Group have taken interest in this bustling community and have begun construction on more than 2± million square feet of spec building development with more in the pipeline. In fact, Tracy has experienced more than 4± million square feet of building space being constructed since 2013. Total built industrial inventory is around 14± million square feet. The City of Tracy is ready for growth and provides expedited permitting services to meet the timing needs of your business.

TRACY IS INNOVATIVE - As part of the Greater Silicon Valley, the region draws from a labor shed of nearly 1 million

people. Its resident workforce is educated and skilled in the technology sector, logistics, and advanced manufacturing. Although Tracy's historical roots are in agriculture and food processing, current industries range from traditional food processing to e-commerce fulfillment to the sophistication of medical device research and development.

TRACY IS CONNECTED - Tracy is the gateway to the San Francisco Bay Area and the California Central Valley, which drives the opportunity to serve more than 14.5 million consumers with just-in-time delivery. A Tracy location offers access to both the Port of Oakland and the Port of Stockton. Union Pacific Railroad and BNSF Railways intermodal facilities are located less than

“Moving to Tracy gave the company the ability to expand...It has worked out great for us here.”

- John Petlansky, President & CEO Pacific Medical, Inc.

25 miles northeast of Tracy. Within 17 miles, the Stockton Metropolitan Airport serves Amazon Fulfillment operations in Tracy running multiple 767 Boeing air cargo deliveries to Amazon Prime customers each day. Interstate and freeway infrastructure adds to the mega regions multi-modal access needs for raw materials and product delivery.



INNOVATIVE



CONNECTED



If your company is actively seeking a location for growth, needs to be in proximity to innovation and talent, and your success depends on your interconnectedness to the world, the City of Tracy and the San Joaquin Partnership are prepared to assist you.

Contact us today to learn more about opportunities awaiting you in Tracy!

(209) 831-6493

www.ThinkInsideTheTriangle.com

www.greatersiliconvalley.com



CALIFORNIA OUTLOOK

State Growth Continues

California's economic growth has slowed from the nation-leading levels of recent years, but continues to expand at a steady rate. We project real gross state product to sustain its expansion at a 2.5% to 3.0% rate and payrolls to grow at about 1.5% rate for the next two years. The Trump administration has not been as disruptive to the healthcare system or international economy as initially feared, both of which are positive developments for California. Thus far, the political environment has featured a lot of noise and cultural conflict, but little in the way of substantive policy actions with significant economic impacts.

Near Term Uncertainties

That could change in the months ahead with tax reform and budget negotiations topping the fall policy agenda in Washington, and the President is weighing whether to reappoint Janet Yellen as chair of the Federal Reserve when her term expires this winter. This is an area to watch because a monetary policy mistake as the Fed continues its path towards normalizing interest rates is a significant risk to the forecast. There is also uncertainty on tax policy. While it seems that large tax cuts would be easy to pass with Republicans controlling Congress and the White House, the President may find it as politically challenging as healthcare reform due to vested interests and concerns about the federal debt. Thus, we are not anticipating any change to monetary policy and only incremental changes to tax policy. While the data points to a calm economic outlook, the political environment remains unpredictable, particularly at the global level where the North Korea nuclear crisis threatens.

Unemployment at Record Lows

In California, the unemployment rate is about 5% and is expected to remain at or slightly below this level over the next few years. Faster growth in California is constrained by the growing scarcity of skilled labor, and extreme housing costs that prevent faster growth to population and the work force.

State Moves to Reduce Housing Shortage

Housing affordability has become a crisis in California, and spurred the legislature to pass 15 housing related bills that the Governor signed in September. This package will provide a modest boost to housing construction in California. For example, we are now projecting 137,000 new housing units in 2020 compared to 132,000 in the May forecast. In 2017, we are expecting statewide housing starts to inch over 100,000 units for the first time since the Great Recession. This is still an insufficient supply to stop the upward pressure on rents and home prices. The most notable parts of the housing package are a \$4 billion bond, and a new fee on recording real estate documents that is estimated to generate about \$250 million in annual funding for affordable housing. Most of these funds will go towards subsidizing the construction of rent and income restricted apartments, and will modestly increase the chance of low-income households moving off the long-waiting list for these units. The best approach to stimulate production of market rate housing is reforming the allocation of property and sales taxes, so that new housing would be less of a financial drain on local governments. New local tax structures could also help restrain the growth of impact fees that tend to be fixed fees per unit which reduce the viability of developing smaller and more affordable apartments and single-family homes.



PARTNERSHIP INVESTORS

Two private sector investors joined the Partnership in 2016 and four in 2017, including one new member of the Board, CT Realty. They are highlighted in the listing below.

Private Sector Investors

A. G. Spanos Companies
A. Teichert & Son
ABC NorCal
ARDEX
Bank of Agriculture & Commerce
Bank of Stockton
BBVA Compass
BHI Management Consulting
BNSF Railway
Boyce Resource Development
Buzz Oates Companies
CA Water Service Co.
The Cambay Group
CB Richard Ellis
CenterPoint Properties
Colliers International
Collins Electrical Company, Inc.
CT Realty
Cummings Design & Advertising
Cushman & Wakefield
Custom Building Products
DeGregori, Gormsen & Ringer
Diede Construction
Dryco Construction, Inc.
DSS Company dba Knife River Construction
Durst Contract Interiors
East Louise Business Park
Farmers & Merchants Bank
Financial Center Credit Union
First Priority Greenfleet
Food 4 Less
Grupe Commercial Company
Haggerty Construction
Hakeem, Ellis & Marengo
Hartin and Hume, Inc.
Hilton Stockton
Holt of CA
JaniTek Cleaning Solutions
JLL
JM Eagle
Kaiser Permanente
Bob & Janet Kavanaugh
Kjeldsen, Sinnock & Neudeck, Inc.
Lagorio Family of Companies
Lee & Associates CRE
Marriott: Residence Inn & Courtyard
MCV Insurance Producers, Inc.
Mid Cal Industrial Properties
Moss Adams LLP
Neumiller & Beardslee
Newmark Cornish & Carey
Nor. CA Carpenters Regional Council

Nor. CA Chapter, NECA
Oak Valley Community Bank
Old Republic Title Co.
OmniTRAX/Stockton Terminal & Eastern RR (ST&E)
Pacific Gas & Electric Co.
Pacific Records Management
Patmon Company, Inc.
Pennino Management Group
Premier Finishing
ProLogis
Ray Morgan Company
The Record
Republic Services
Rivermaid Trading Company
The Robert Rishwain Family Foundation
San Joaquin Delta College
Sardee Industries, Inc.
Schwartz, Gianni, Lantsberger & Adamson
Accountancy Corporation
Siegfried Engineering, Inc.
Sisler & Sisler Construction
St. Joseph's Medical Center
Stockton Chamber of Commerce
Stockton Heat Hockey
Stockton Port Properties
Stockton Ports
Surtec, Inc.
Sutter Tracy Community Hospital
TMW & Associates, Inc.
United Rentals
University of the Pacific
U. S. Bank
Vaquero Farms
Verve Networks
Waste Management
Wells Fargo Bank
WMB Architects, Inc.

Public Sector Investors

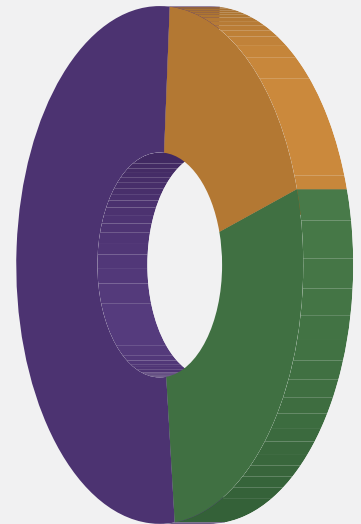
ACE - SJ Rail Commission
City of Lathrop
City of Lodi
City of Manteca
City of Ripon
City of Stockton
City of Tracy
Port of Stockton
San Joaquin County
San Joaquin Council of Governments
San Joaquin Regional Transit District

ATTACHMENT B

2017 BUDGET

Projected Revenues

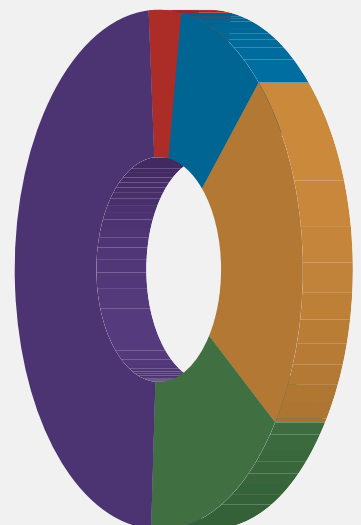
\$1,002,283



Private / New Contributions 52.8%
Public Contributions 28.3%
Miscellaneous Income 18.9%

Projected Expenses

\$992,582



Program 48.2%
Direct Marketing 15.9%
General Management 22.7%
Advertising Expense 9.7%
Fundraising 3.5%



S U C C E S S F U L P R O J E C T S

The San Joaquin Partnership's 2016 Marketing & Outreach Program also assisted local communities and businesses in expansion and retention of employers. In addition it supports educational opportunities that increase the skills of the labor force and markets a positive image.

Logistics

Air Transport International (ATI)

Provides air cargo services for Amazon PrimeAir.

New/Retained Jobs: 200 new

Square Footage: 25,800

Location: San Joaquin County (Stockton)

San Joaquin Partnership Services: Site locations, site/building tour, site analysis, information assistance.

Agency Assistance: Stockton Metropolitan Airport

Le Tote

Women's clothing rental agency with orders primarily from online.

New/Retained Jobs: 175 new

Square Footage: 150,000

Location: Stockton

San Joaquin Partnership Services: Incentive analysis, human resource assistance, permit assistance, meeting facilitation, provider referrals, water/wastewater analysis.

San Joaquin Partnership Investor(s) Pacific Gas & Electric

Broker(s): (Tenant Rep) Sandra Weck, Colliers International (Lessor Rep) Bob Taylor, Tim Mustin, JLL

Agency Assistance: City of Stockton, San Joaquin County WorkNet, State of CA EDD (Stockton office)

PrimeSource Building Products, Inc.

Building products and accessories supplier.

New/Retained Jobs: 25 new

Square Footage: 129,960

Location: Stockton

San Joaquin Partnership Services: Incentive information, human resource assistance, provider referrals, meeting facilitation.

San Joaquin Partnership Investor(s) Broker(s): (Tenant Rep) Jason Ovadia, JLL

(Lessor Rep) Bob Taylor, Tim Mustin, JLL

Agency Assistance: San Joaquin County WorkNet, San Joaquin Delta College

Targa Terminals

Biodiesel blending facility at the Port of Stockton.

New/Retained Jobs: 12 new

Square Footage: 4,400

Location: Stockton-Port

San Joaquin Partnership Services: Incentive information, fee estimates.

Agency Assistance: Port of Stockton, City of Stockton

Manufacturing

Best Express Foods, Inc.

Manufacturer of tortilla chips, corn/ flour tortillas, breads, pastries and cookies.

New/Retained Jobs: 300 new

Square Footage: 102,650

Location: Stockton

San Joaquin Partnership Services: Site location assistance, incentive information, provider referrals and meeting facilitation.

San Joaquin Partnership Investor(s) Pacific Gas & Electric, Haggerty Construction

Broker(s): (Buyer Rep) Jay Hagglund, Cassidy Turley

(Seller Rep) Darren McFadden & Thomas Davis, Lee & Associate

Agency Assistance: City of Stockton Economic Development Department





S U C C E S S F U L P R O J E C T S

Manufacturing

Cepheid

(Expansion/Assist)

Produces Molecular Diagnostic Testing Systems and devices for testing of patient specimens.

New/Retained Jobs: 40-270 new

Square Footage: 73,954

Location: Lodi

San Joaquin Partnership Services:
Site location assistance, incentive information.

Agency Assistance: City of Lodi

Oakland Pallet Company, Inc.

(Expansion/Retention)

Manufacturer & supplier of up cycled GMA grades & custom recycled hybrid pallets, hardwood, heat treated, block,

deck & wing pallets in California.

Supplier to Ghiradelli, Restoration Hardware, Tesla, Gallo, Coca-Cola, Trinchero Family Estates, etc.

New/Retained Jobs: 30-40 new

Square Footage: 44,674

Location: Stockton

San Joaquin Partnership Services:
Site location assistance, fee estimates, incentive analysis and permit assistance.

Broker(s): (Tenant Rep) Bob Taylor/Tim Mustin-JLL

(Sublessor Rep) John Fondale-
Newmark Cornish & Carey
Agency Assistance: City of Stockton

Refinishing Group, Inc.

Manufactures custom spray booths for autos, trucks, big rigs and custom needs.

New/Retained Jobs: 10 new

Square Footage: 64,000

Location: Tracy

San Joaquin Partnership Services:
Incentive information.

Broker(s): (Tenant Rep) Tyson Vallenari,
CB Richard Ellis

(Lessor Rep) Mike Goldstein, Greg O'Leary, Wes Widmer, Colliers International



S U C C E S S F U L P R O J E C T S

Valley Snack Foods, Inc.

Company roasts chick peas and nuts for various snack food manufacturers.

New/Retained Jobs: 10-24 new

Square Footage: 23,680

Location: Stockton

San Joaquin Partnership Services:
Incentive analysis, permit assistance,
meeting facilitation, provider referrals.

Broker(s): (Tenant Rep) Tom Solomon,
CoSol Commercial Real Estate

(Lessor Rep) Bob Taylor,
Tim Mustin, JLL

Agency Assistance: City of Stockton
(Economic Development, Community
Development, Municipal Utilities, Fire
Departments), San Joaquin Flood
Management Agency.

Griffin Soils Group

Truck maintenance & repair yard soil
stabilization company.

New/Retained Jobs: 5-10 new

Square Footage: 44,640

Location: Stockton

San Joaquin Partnership Services:
Incentive information, meeting
facilitation, provider referrals.

Broker(s): (Lessor & Tenant Rep) Mark
Reckers, Lee & Associates.

Agency Assistance: City of Stockton

Pacific Gas & Electric

(Expansion/Retention/Assist)
Regional Office. Billing and contact call
center. Credit operations and houses
an Energy Training Center.

New/Retained Jobs: 450 retained

Square Footage: 137,840

Location: Stockton

San Joaquin Partnership Services:
Information assistance.

Broker(s): (Lessor Rep) Brian Peterson/
Steve White, CB Richard Ellis
(Tenant Rep) Jon Bruner, Cushman &
Wakefield

Penske Truck Leasing

Truck maintenance facility.

New/Retained Jobs: 2 new

Square Footage: 14,438

Location: San Joaquin County (Tracy)

San Joaquin Partnership Services:
Permit assistance.

Agency Assistance: San Joaquin
County

Grand Totals

Projects: 12

New Jobs: 809-to-1068

Retained Jobs: 450

Square Footage: 816,036





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California Annual Forecast Summary

Year	2016	2017	2018	2019	2020	2021
Real Gross State Product (% Change)	2.9	2.6	2.9	2.7	2.4	2.3
Non-Farm Payroll Employment (% Change)	2.7	1.6	1.5	1.2	1.0	0.8
Unemployment Rate (% Change)	5.4	4.9	4.8	4.7	4.7	4.8
Housing Starts	96,300	110,400	128,600	133,200	136,800	141,000

Tesla Motors Chose Lathrop, CA as the place to grow.

- ★ Strategically located on I-5
- ★ Available industrial sites
- ★ Home to UP Intermodal
- ★ Business friendly city staff
- ★ New industrial buildings

"We look forward to working diligently with Tesla to create more opportunities for their continued success."

— Lathrop Mayor
Sonny Dhaliwal

www.ci.lathrop.ca.us
209-941-7220

"Lathrop is a prime location and a great low cost alternative for expanding Bay Area companies such as Tesla and we see great opportunity in the near future."

— City Manager
Stephen Salvatore



Central Valley Metro Forecast Summary

Non-Farm Payroll Employment (% Change)

Year	2016	2017	2018	2019	2020
Sacramento	3.5	1.8	2.4	1.6	1.4
Stockton	3.4	1.8	2.1	1.6	1.3
Modesto	3.3	2.8	2.1	1.0	1.0
Merced	2.6	2.4	3.2	1.7	1.7
Fresno	3.5	2.0	1.7	1.2	1.2
California	2.7	1.6	1.5	1.2	1.0

Unemployment Rate (%)

Year	2016	2017	2018	2019	2020
Sacramento	5.2	4.9	4.6	4.5	4.6
Stockton	8.1	7.5	7.2	6.8	6.8
Modesto	8.5	7.8	7.8	7.7	7.8
Merced	10.5	10.0	9.6	8.9	8.6
Fresno	9.4	9.1	9.0	8.8	8.8
California	5.4	4.9	4.8	4.7	4.7

NOTE: Sacramento MSA includes Sacramento, El Dorado, Placer, and Yolo Counties. Stockton, Merced, Fresno and Modesto MSAs correspond to San Joaquin, Merced, Fresno and Stanislaus Counties.

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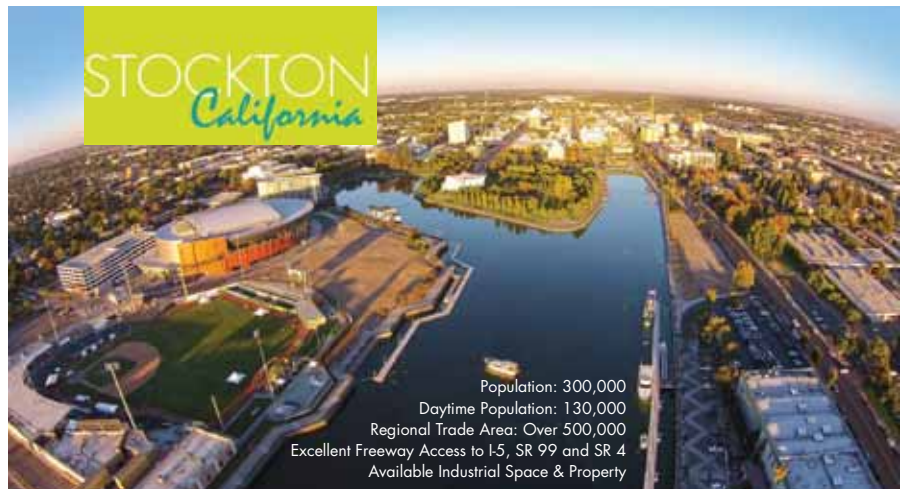
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Population: 300,000
Daytime Population: 130,000
Regional Trade Area: Over 500,000
Excellent Freeway Access to I-5, SR 99 and SR 4
Available Industrial Space & Property



AFFORDABLE BUILDINGS
and land for development or expansion.



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San Joaquin Partnership **helps companies grow**

The San Joaquin Partnership provides confidential no-cost/no obligation services to businesses and industries interested in locating or expanding their operations within San Joaquin County. Working closely with the County and its seven incorporated cities, the partnership helps facilitate, among other services:

- » Database of available properties
- » Site tours
- » Labor market analysis
- » Employee recruiting
- » Location incentives
- » Development fees and utility costs analyses
- » Government entitlement
- » Permitting

San Joaquin Partnership is a private, non-profit economic development corporation headquartered in Stockton.

**Learn more at www.sanjoaquinusa.org
or call 800-570-JOBS x5627.**



SAN JOAQUIN PARTNERSHIP

A private non-profit economic development
corporation serving San Joaquin County