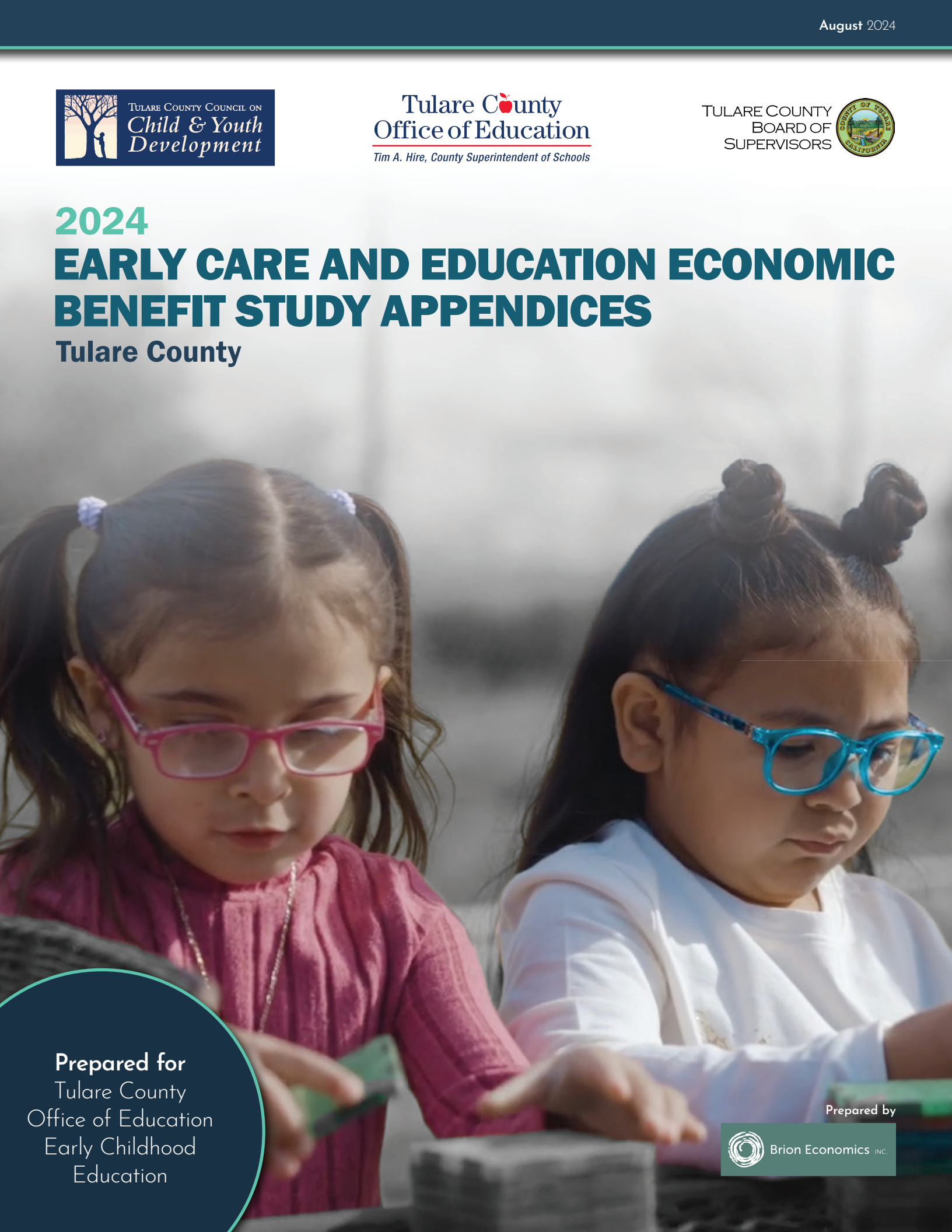
Tulare County Council on Child & Youth Development

Tulare County Office of Education
Tim A. Hire, County Superintendent of Schools

Tulare County Board of Supervisors

2024
EARLY CARE AND EDUCATION ECONOMIC BENEFIT STUDY APPENDICES
Tulare County



Prepared for
Tulare County Office of Education Early Childhood Education

Prepared by
Brion Economics INC.

Appendix A: IMPLAN Results and Base Data

Appendix A
Detailed IMPLAN Results and Base Data by Industry Sector
ECE Economic Benefit Study – Tulare County 2024

Source: Brion Economics, Inc.; Economic & Planning Systems, Inc.

Table A-1
Detailed IMPLAN Model Results for ECE Industry
ECE Economic Benefit Study – Tulare County 2024

IMPLAN Sector Code	Industry Sector	Direct Effect	Indirect Effect	Induced Effect	Total Effect
1	Oilseed farming		$0	$5	**$5**
2	Grain farming		$338	$785	**$1,123**
3	Vegetable & melon farming		$34	$1,677	**$1,711**
4	Fruit farming		$970	$32,619	**$33,589**
5	Tree nut farming		$255	$6,572	**$6,828**
6	Greenhouse, nursery, & floriculture production		$865	$5,962	**$6,827**
7	Tobacco farming		$0	$0	**$0**
8	Cotton farming		$92	$2,171	**$2,263**
9	Sugarcane & sugar beet farming		$0	$0	**$0**
10	All other crop farming		$1,411	$18,047	**$19,458**
11	Beef cattle ranching & farming, incl. feedlots & dual-purpose ranching & farming		$4,880	$11,856	**$16,736**
12	Dairy cattle & milk production		$236,941	$80,921	**$317,862**
13	Poultry & egg production		$119	$3,564	**$3,682**
14	Animal production, except cattle & poultry & eggs		$136	$3,395	**$3,531**
15	Forestry, forest products, & timber tract production		$5	$18	**$24**
16	Commercial logging		$215	$18	**$233**
18	Commercial hunting & trapping		$0	$2,462	**$2,462**
19	Support activities for agriculture & forestry		$6,841	$11,012	**$17,853**
20	Oil & gas extraction		$12,718	$16,354	**$29,071**
28	Stone mining & quarrying		$14,684	$6,385	**$21,069**
29	S& & gravel mining		$4,532	$376	**$4,907**
36	Support activities for oil & gas operations		$0	$1	**$1**
37	Metal mining services		$9	$7	**$16**
38	Other nonmetallic minerals services		$17	$4	**$21**
39	Electric power generation - Hydroelectric		$14,397	$9,014	**$23,411**
40	Electric power generation - Fossil fuel		$184,467	$115,489	**$299,956**
42	Electric power generation - Solar		$16,501	$10,331	**$26,832**
45	Electric power generation - Biomass		$18,441	$11,545	**$29,987**
47	Electric power transmission & distribution		$435,551	$272,684	**$708,235**
48	Natural gas distribution		$308,198	$310,773	**$618,971**
49	Water, sewage & other systems		$60,774	$117,119	**$177,893**
60	Maintenance & repair construction of nonresidential structures		$997,368	$259,455	**$1,256,823**
61	Maintenance & repair construction of residential structures		$30,367	$364,990	**$395,357**
62	Maintenance & repair construction of highways, streets, bridges, & tunnels		$0	$63	**$63**
63	Dog & cat food mfg.		$24	$2,887	**$2,911**
64	Other animal food mfg.		$21,930	$16,321	**$38,251**
69	Soybean & other oilseed processing		$32	$77	**$109**
70	Fats & oils refining & blending		$15	$83	**$98**
74	Nonchocolate confectionery mfg.		$37	$45	**$82**
77	Frozen fruits, juices & vegetables mfg.		$760	$32,926	**$33,686**
78	Frozen specialties mfg.		$937	$34,937	**$35,874**
79	Canned fruits & vegetables mfg.		$3,527	$1,427	**$4,954**
81	Dehydrated food products mfg.		$1,166	$299	**$1,465**
82	Cheese mfg.		$160,950	$24,701	**$185,652**
83	Dry, condensed, & evaporated dairy product mfg.		$19,260	$3,280	**$22,540**
84	Fluid milk mfg.		$478,854	$51,197	**$530,050**
85	Creamery butter mfg.		$190,742	$21,016	**$211,757**
86	Ice cream & frozen dessert mfg.		$29,560	$1,482	**$31,042**
87	Frozen cakes & other pastries mfg.		$1,621	$1,217	**$2,838**
88	Poultry processing		$346	$743	**$1,089**
89	Animal, except poultry, slaughtering		$627	$195	**$822**
90	Meat processed from carcasses		$27	$829	**$856**
91	Rendering & meat byproduct processing		$10	$47	**$58**
93	Bread & bakery product, except frozen, mfg.		$10,668	$7,877	**$18,545**
96	Tortilla mfg.		$1,829	$1,882	**$3,712**
97	Roasted nuts & peanut butter mfg.		$806	$12,840	**$13,646**
98	Other snack food mfg.		$12	$445	**$457**
99	Coffee & tea mfg.		$53	$707	**$759**
101	Mayonnaise, dressing, & sauce mfg.		$563	$447	**$1,010**
102	Spice & extract mfg.		$347	$1,053	**$1,401**

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ECE Economic Benefit Study – Tulare County 2024

IMPLAN Sector Code	Industry Sector	Direct Effect	Indirect Effect	Induced Effect	Total Effect
103	All other food mfg.		$83	$107	**$190**
106	Breweries		$15	$340	**$355**
107	Wineries		$79	$1,438	**$1,517**
110	Fiber, yarn, & thread mills		$1	$16	**$17**
115	Textile & fabric finishing mills		$3	$19	**$22**
119	Textile bag & canvas mills		$2	$25	**$27**
121	Other textile product mills		$29	$102	**$132**
122	Hosiery & sock mills		$0	$5	**$5**
123	Other apparel knitting mills		$0	$6	**$7**
124	Cut & sew apparel contractors		$0	$1	**$1**
125	Men's & boys' cut & sew apparel mfg.		$0	$4	**$5**
126	Women's & girls' cut & sew apparel mfg.		$2	$786	**$788**
127	Other cut & sew apparel mfg.		$0	$6	**$6**
128	Apparel accessories & other apparel mfg.		$0	$7	**$7**
130	Footwear mfg.		$0	$13	**$13**
132	Sawmills		$9,287	$516	**$9,803**
137	Wood windows & door mfg.		$15,973	$1,356	**$17,328**
139	Other millwork, incl. flooring		$3,795	$534	**$4,329**
140	Wood container & pallet mfg.		$1,109	$7,120	**$8,229**
141	Manufactured home (mobile home) mfg.		$1,775	$57	**$1,832**
143	All other misc. wood product mfg.		$5,058	$894	**$5,952**
147	Paperboard container mfg.		$50,887	$23,358	**$74,245**
148	Paper bag & coated & treated paper mfg.		$105	$108	**$213**
152	Printing		$54,350	$48,477	**$102,827**
160	Industrial gas mfg.		$3,998	$9,297	**$13,295**
163	Other basic organic chemical mfg.		$1,197	$1,543	**$2,740**
167	Nitrogenous fertilizer mfg.		$1,269	$1,014	**$2,282**
169	Fertilizer mixing		$414	$267	**$682**
170	Pesticide & other agricultural chemical mfg.		$163	$591	**$754**
171	Medicinal & botanical mfg.		$0	$8	**$8**
173	In-vitro diagnostic substance mfg.		$2	$7	**$8**
175	Paint & coating mfg.		$348	$56	**$404**
178	Polish & other sanitation good mfg.		$175	$205	**$380**
185	Other misc. chemical product mfg.		$113	$56	**$169**
186	Plastics packaging materials & unlaminated film & sheet mfg.		$486	$294	**$780**
187	Unlaminated plastics profile shape mfg.		$842	$590	**$1,432**
188	Plastics pipe & pipe fitting mfg.		$13,302	$4,351	**$17,653**
190	Polystyrene foam product mfg.		$2,010	$4,784	**$6,794**
191	Urethane & other foam product (except polystyrene) mfg.		$239	$773	**$1,012**
193	Other plastics product mfg.		$973	$475	**$1,448**
194	Tire mfg.		$39	$497	**$536**
196	Other rubber product mfg.		$39	$86	**$125**
203	Cement mfg.		$6,595	$1,352	**$7,947**
204	Ready-mix concrete mfg.		$31,955	$4,733	**$36,688**
206	Concrete pipe mfg.		$3,051	$1,390	**$4,440**
211	Cut stone & stone product mfg.		$53	$708	**$761**
215	Iron & steel mills & ferroalloy mfg.		$1,285	$216	**$1,502**
221	Aluminum sheet, plate, & foil mfg.		$7	$4	**$10**
222	Other aluminum rolling, drawing & extruding		$17	$13	**$30**
225	Nonferrous metal, except copper & aluminum, shaping		$13	$9	**$22**
230	Crown & closure mfg. & metal stamping		$178	$128	**$306**
234	Handtool mfg.		$10	$30	**$41**
235	Prefabricated metal buildings & components mfg.		$1,420	$484	**$1,904**
236	Fabricated structural metal mfg.		$1,003	$176	**$1,179**
237	Plate work mfg.		$241	$117	**$359**
238	Metal window & door mfg.		$1,411	$187	**$1,598**
239	Sheet metal work mfg.		$445	$54	**$498**
240	Ornamental & architectural metal work mfg.		$496	$64	**$560**
246	Spring & wire product mfg.		$214	$161	**$375**
247	Machine shops		$134	$146	**$281**
248	Turned product & screw, nut, & bolt mfg.		$21	$38	**$59**
250	Metal coating & nonprecious engraving		$19	$22	**$42**

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IMPLAN Sector Code	Industry Sector	Direct Effect	Indirect Effect	Induced Effect	Total Effect
251	Electroplating, anodizing, & coloring metal		$16	$20	**$36**
252	Valve & fittings, other than plumbing, mfg.		$175	$72	**$247**
253	Plumbing fixture fitting & trim mfg.		$2,997	$589	**$3,586**
259	Other fabricated metal mfg.		$178	$72	**$250**
260	Farm machinery & equipment mfg.		$245	$161	**$407**
265	Semiconductor machinery mfg.		$1	$2	**$3**
266	Food product machinery mfg.		$5	$1	**$6**
271	Photographic & photocopying equipment mfg.		$0	$0	**$1**
272	Other commercial service industry machinery mfg.		$4	$4	**$8**
279	Machine tool mfg.		$1	$2	**$3**
285	Pump & pumping equipment mfg.		$4	$3	**$6**
286	Air & gas compressor mfg.		$2	$2	**$4**
288	Conveyor & conveying equipment mfg.		$7	$2	**$9**
293	Packaging machinery mfg.		$5	$5	**$10**
302	Broadcast & wireless communications equipment mfg.		$0	$2	**$2**
305	Printed circuit assembly (electronic assembly) mfg.		$2	$4	**$6**
307	Semiconductor & related device mfg.		$5	$8	**$13**
315	Totalizing fluid meter & counting device mfg.		$47	$24	**$71**
320	Blank magnetic & optical recording media mfg.		$13,296	$11,640	**$24,937**
321	Software & other prerecorded & record reproducing		$9	$13	**$23**
339	All other misc. electrical equipment & component mfg.		$4	$4	**$8**
342	Heavy duty truck mfg.		$4	$13	**$17**
348	Motor vehicle electrical & electronic equipment mfg.		$23	$19	**$42**
351	Motor vehicle metal stamping		$8	$10	**$18**
352	Other motor vehicle parts mfg.		$64	$126	**$191**
353	Motor vehicle steering, suspension component (except spring), & brake systems mfg.		$1,770	$931	**$2,700**
362	Motorcycle, bicycle, & parts mfg.		$21	$78	**$99**
365	Wood kitchen cabinet & countertop mfg.		$161	$97	**$257**
374	Mattress mfg.		$4	$447	**$451**
379	Ophthalmic goods mfg.		$0	$27	**$27**
380	Dental laboratories		$0	$15	**$15**
381	Jewelry & silverware mfg.		$6	$721	**$727**
382	Sporting & athletic goods mfg.		$2	$3	**$5**
385	Sign mfg.		$1,405	$1,229	**$2,634**
391	All other misc. mfg.		$20	$15	**$35**
392	Wholesale - Motor vehicle & motor vehicle parts & supplies		$34,463	$131,282	**$165,745**
393	Wholesale - Professional & commercial equipment & supplies		$80,286	$275,751	**$356,037**
394	Wholesale - Household appliances & electrical & electronic goods		$100,987	$122,824	**$223,811**
395	Wholesale - Machinery, equipment, & supplies		$94,853	$87,588	**$182,441**
396	Wholesale - Other durable goods merchant wholesalers		$210,797	$239,017	**$449,814**
397	Wholesale - Drugs & druggists' sundries		$4,392	$220,971	**$225,363**
398	Wholesale - Grocery & related product wholesalers		$326,305	$195,199	**$521,504**
399	Wholesale - Petroleum & petroleum products		$131,006	$446,526	**$577,532**
400	Wholesale - Other nondurable goods merchant wholesalers		$155,660	$544,226	**$699,886**
401	Wholesale - Wholesale electronic markets & agents & brokers		$20,702	$43,917	**$64,619**
402	Retail - Motor vehicle & parts dealers		$15,313	$555,650	**$570,963**
403	Retail - Furniture & home furnishings stores		$3,351	$229,489	**$232,840**
404	Retail - Electronics & appliance stores		$2,670	$199,330	**$202,000**
405	Retail - Building material & garden equipment & supplies stores		$112,069	$411,376	**$523,445**
406	Retail - Food & beverage stores		$5,399	$1,226,142	**$1,231,541**
407	Retail - Health & personal care stores		$369	$567,102	**$567,471**
408	Retail - Gasoline stores		$17,720	$596,434	**$614,154**
409	Retail - Clothing & clothing accessories stores		$559	$789,948	**$790,506**
410	Retail - Sporting goods, hobby, musical instrument & book stores		$4,666	$317,147	**$321,813**
411	Retail - General merchandise stores		$13,113	$1,182,117	**$1,195,229**
412	Retail - misc. store retailers		$6,483	$468,002	**$474,485**
413	Retail - Nonstore retailers		$29,435	$2,063,490	**$2,092,926**
414	Air transportation		$7,060	$16,992	**$24,052**
415	Rail transportation		$30,129	$18,049	**$48,178**
416	Water transportation		$266	$4,189	**$4,455**
417	Truck transportation		$469,105	$742,426	**$1,211,531**

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IMPLAN Sector Code	Industry Sector	Direct Effect	Indirect Effect	Induced Effect	Total Effect
418	Transit & ground passenger transportation		$95,131	$221,829	**$316,960**
419	Pipeline transportation		$7,110	$7,831	**$14,940**
420	Scenic & sightseeing transportation & support activities for transportation		$53,766	$116,646	**$170,412**
421	Couriers & messengers		$103,100	$240,946	**$344,047**
422	Warehousing & storage		$147,782	$465,408	**$613,190**
423	Newspaper publishers		$20,329	$30,425	**$50,754**
424	Periodical publishers		$2,667	$5,086	**$7,753**
428	Software publishers		$4,616	$55,507	**$60,123**
429	Motion picture & video industries		$49,226	$63,120	**$112,346**
430	Sound recording industries		$2,950	$21,734	**$24,684**
431	Radio & television broadcasting		$67,308	$84,978	**$152,286**
432	Cable & other subscription programming		$90,503	$150,723	**$241,226**
433	Wired telecommunications carriers		$60,747	$140,973	**$201,719**
434	Wireless telecommunications carriers (except satellite)		$153,697	$338,793	**$492,491**
435	Satellite, telecommunications resellers, & all other telecommunications		$10,915	$20,199	**$31,114**
436	Data processing, hosting, & related services		$8,528	$26,479	**$35,007**
437	News syndicates, libraries, archives & all other information services		$590	$19,975	**$20,565**
438	Internet publishing & broadcasting & web search portals		$34,777	$48,906	**$83,683**
439	Nondepository credit intermediation & related activities		$45,886	$324,082	**$369,967**
440	Securities & commodity contracts intermediation & brokerage		$103,598	$307,283	**$410,881**
441	Monetary authorities & depository credit intermediation		$553,202	$1,250,360	**$1,803,562**
442	Other financial investment activities		$204,410	$595,484	**$799,894**
443	Direct life insurance carriers		$780	$56,208	**$56,988**
444	Insurance carriers, except direct life		$534,485	$779,312	**$1,313,797**
445	Insurance agencies, brokerages, & related activities		$548,561	$704,261	**$1,252,821**
446	Funds, trusts, & other financial vehicles		$5,815	$541,595	**$547,409**
447	Other real estate		$17,310,245	$1,664,353	**$18,974,598**
448	Tenant-occupied housing		$0	$452,516	**$452,516**
449	Owner-occupied dwellings		$0	$9,392,159	**$9,392,159**
450	Automotive equipment rental & leasing		$24,139	$92,149	**$116,288**
451	General & consumer goods rental except video tapes & discs		$28,512	$174,724	**$203,237**
452	Video tape & disc rental		$2	$56,306	**$56,308**
453	Commercial & industrial machinery & equipment rental & leasing		$79,652	$36,599	**$116,251**
454	Lessors of nonfinancial intangible assets		$2,076	$2,371	**$4,447**
455	Legal services		$139,260	$180,201	**$319,461**
456	Accounting, tax preparation, bookkeeping, & payroll services		$590,532	$249,654	**$840,186**
457	Architectural, engineering, & related services		$315,209	$78,931	**$394,140**
458	Specialized design services		$8,636	$11,691	**$20,327**
459	Custom computer programming services		$12,816	$7,664	**$20,480**
460	Computer systems design services		$9,153	$4,865	**$14,017**
461	Other computer related services, incl. facilities management		$5,273	$2,803	**$8,077**
462	Management consulting services		$93,897	$51,969	**$145,867**
463	Environmental & other technical consulting services		$123,683	$73,899	**$197,582**
464	Scientific research & development services		$10,911	$244,993	**$255,904**
465	Advertising, public relations, & related services		$65,480	$57,178	**$122,658**
466	Photographic services		$7,077	$38,632	**$45,709**
467	Veterinary services		$122	$116,241	**$116,363**
468	Marketing research & all other misc. professional, scientific, & technical services		$119,249	$39,549	**$158,798**
469	Management of companies & enterprises		$278,071	$228,430	**$506,501**
470	Office administrative services		$51,841	$25,114	**$76,955**
471	Facilities support services		$8,918	$5,769	**$14,688**
472	Employment services		$1,237,481	$677,607	**$1,915,088**
473	Business support services		$101,848	$91,212	**$193,060**
474	Travel arrangement & reservation services		$7,812	$62,422	**$70,234**
475	Investigation & security services		$61,886	$50,141	**$112,027**
476	Services to buildings		$1,215,013	$241,675	**$1,456,688**
477	Landscape & horticultural services		$458,936	$168,247	**$627,183**
478	Other support services		$45,394	$47,057	**$92,452**
479	Waste management & remediation services		$177,205	$136,536	**$313,740**
480	Elementary & secondary schools		$0	$68,310	**$68,310**

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IMPLAN Sector Code	Industry Sector	Direct Effect	Indirect Effect	Induced Effect	Total Effect
481	Junior colleges, colleges, universities, & professional schools		$611	$173,338	**$173,949**
482	Other educational services		$2,739	$140,151	**$142,890**
483	Offices of physicians		$0	$2,113,456	**$2,113,456**
484	Offices of dentists		$0	$581,297	**$581,297**
485	Offices of other health practitioners		$0	$426,771	**$426,771**
486	Outpatient care centers		$0	$1,086,835	**$1,086,835**
487	Medical & diagnostic laboratories		$1	$144,484	**$144,485**
488	Home health care services		$0	$129,991	**$129,991**
489	Other ambulatory health care services		$83	$230,185	**$230,268**
490	Hospitals		$0	$263,428	**$263,428**
491	Nursing & community care facilities		$0	$697,958	**$697,958**
492	Residential intellectual disability, mental health, substance abuse & other facilities		$0	$177,883	**$177,883**
493	Individual & family services		$0	$698,211	**$698,211**
494	**Child day care services**	**$282,190,359**	**$0**	**$152,982**	**$282,343,341**
495	Community food, housing, & other relief services, incl. rehabilitation services		$0	$286,982	**$286,982**
496	Performing arts companies		$3,316	$34,097	**$37,414**
497	Commercial Sports Except Racing		$5,177	$34,275	**$39,451**
498	Racing & Track Operation		$144	$17,672	**$17,816**
499	Independent artists, writers, & performers		$84,059	$10,317	**$94,376**
500	Promoters of performing arts & sports & agents for public figures		$17,228	$79,906	**$97,134**
501	Museums, historical sites, zoos, & parks		$1	$16,575	**$16,576**
502	Amusement parks & arcades		$10	$5,044	**$5,054**
503	Gambling industries (except casino hotels)		$390	$95,947	**$96,338**
504	Other amusement & recreation industries		$1,614	$39,661	**$41,276**
505	Fitness & recreational sports centers		$3,552	$58,056	**$61,608**
506	Bowling centers		$0	$15,044	**$15,044**
507	Hotels & motels, incl. casino hotels		$310	$1,146	**$1,456**
508	Other accommodations		$3	$451	**$454**
509	Full-service restaurants		$990,062	$1,487,495	**$2,477,557**
510	Limited-service restaurants		$177,288	$2,898,313	**$3,075,601**
511	All other food & drinking places		$538,634	$758,658	**$1,297,292**
512	Automotive repair & maintenance, except car washes		$121,199	$772,099	**$893,298**
513	Car washes		$48,841	$523,606	**$572,447**
514	Electronic & precision equipment repair & maintenance		$50,971	$34,151	**$85,122**
515	Commercial & industrial machinery & equipment repair & maintenance		$156,069	$92,539	**$248,608**
516	Personal & household goods repair & maintenance		$55,567	$71,561	**$127,128**
517	Personal care services		$0	$184,724	**$184,724**
518	Death care services		$0	$53,589	**$53,589**
519	Dry-cleaning & laundry services		$48,799	$25,701	**$74,500**
520	Other personal services		$3,949	$151,680	**$155,629**
521	Religious organizations		$0	$857,219	**$857,219**
522	Grantmaking, giving, & social advocacy organizations		$9	$199,919	**$199,928**
523	Business & professional associations		$9,235	$52,889	**$62,124**
524	Labor & civic organizations		$0	$167,068	**$167,068**
525	Private households		$0	$79,696	**$79,696**
526	Postal service		$41,438	$80,818	**$122,256**
527	Federal electric utilities		$0	$0	**$0**
528	Other federal government enterprises		$1,263	$2,304	**$3,566**
534	Other local government enterprises		$1,639,261	$1,034,391	**$2,673,653**
	Totals	**$282,190,359**	**$34,913,009**	**$52,471,148**	**$369,574,516**

Note: Only industry sectors with a positive benefit are shown; all sectors with $0 benefit are hidden.

Source: IMPLAN Cloud; Brion Economics, Inc.; Economic & Planning Systems, Inc.

Table A-2
Detailed IMPLAN Base Industry Data - 2022
ECE Economic Benefit Study – Tulare County 2024

Industry Sector Code	Industry Sector	Total Output	Wage and Salary Employment	Employee Compensation	Proprietor Employment	Proprietor Income	Other Property Income	Taxes on Production and Imports Net of Subsidies
1	Oilseed farming	$405,990	0.0	$1,190	0.1	$128,341	$258,660	$2,319
2	Grain farming	$13,316,361	14.4	$941,495	4.4	$3,648,716	$2,745,099	($426,571)
3	Vegetable & melon farming	$12,509,877	38.2	$1,620,419	11.8	$2,845,202	$3,794,022	$164,297
4	Fruit farming	$1,414,034,683	5,912.3	$191,747,556	1,230.9	$495,702,097	$465,848,170	$19,273,144
5	Tree nut farming	$373,007,268	1,601.5	$63,688,815	467.9	$112,302,011	$120,266,367	$5,408,302
6	Greenhouse, nursery, & floriculture production	$62,577,264	244.8	$10,958,946	10.1	$7,937,453	$26,421,713	$763,692
7	Tobacco farming	$0	-	$0	-	$0	$0	$0
8	Cotton farming	$35,021,654	248.2	$16,029,911	20.8	$4,049,487	$12,044,782	($52,718)
9	Sugarcane & sugar beet farming	$0	-	$0	-	$0	$0	$0
10	All other crop farming	$68,146,188	394.4	$20,369,482	704.2	$8,283,983	$21,750,991	($227,348)
11	Beef cattle ranching & farming, including feedlots & dual-purpose ranching & farming	$739,578,536	195.1	$11,269,355	1,120.9	$99,416,847	$323,121,204	$6,544,850
12	Dairy cattle & milk production	$2,874,804,901	2,683.5	$127,257,275	723.0	$172,822,675	$408,479,363	$31,982,255
13	Poultry & egg production	$73,422,230	56.1	$4,606,482	8.7	$1,364,341	$4,719,303	$1,125,323
14	Animal production, except cattle & poultry & eggs	$26,687,585	38.5	$2,363,698	18.8	$7,901,429	$15,988,028	$267,766
15	Forestry, forest products, & timber tract production	$7,948,105	32.8	$1,654,059	15.6	$4,547,848	$305,108	$138,128
16	Commercial logging	$10,231,285	16.0	$1,408,461	11.2	$5,758,704	$1,792,737	$164,207
17	Commercial fishing	$0	-	$0	-	$0	$0	$0
18	Commercial hunting & trapping	$5,383,722	1.9	$65,429	3.2	$1,980,800	$3,044,835	$198,414
19	Support activities for agriculture & forestry	$1,410,213,378	25,707.8	$1,166,611,715	786.8	$51,407,505	($5,565,599)	$61,723,209
20	Oil & gas extraction	$39,094,555	-	$0	41.9	$285,274	$0	$3,484,042
21	Coal mining	$0	-	$0	-	$0	$0	$0
22	Copper, nickel, lead, & zinc mining	$0	-	$0	-	$0	$0	$0
23	Iron ore mining	$0	-	$0	-	$0	$0	$0
24	Gold ore mining	$0	-	$0	-	$0	$0	$0
25	Silver ore mining	$0	-	$0	-	$0	$0	$0
26	Uranium-radium-vanadium ore mining	$0	-	$0	-	$0	$0	$0
27	Other metal ore mining	$0	-	$0	-	$0	$0	$0
28	Stone mining & quarrying	$23,409,015	26.1	$1,985,141	3.8	$462,245	$13,521,510	$1,014,516
29	S& & gravel mining	$11,130,001	30.6	$2,399,900	3.3	$267,110	$3,244,344	$732,566
30	Other clay, ceramic, refractory minerals mining	$0	-	$0	-	$0	$0	$0
31	Potash, soda, & borate mineral mining	$0	-	$0	-	$0	$0	$0
32	Phosphate rock mining	$0	-	$0	-	$0	$0	$0
33	Other chemical & fertilizer mineral mining	$0	-	$0	-	$0	$0	$0
34	Other nonmetallic minerals	$0	-	$0	-	$0	$0	$0
35	Drilling oil & gas wells	$10,719,582	15.0	$1,275,228	8.1	$38,140	$2,115,826	$731,162
36	Support activities for oil & gas operations	$925,813	-	$0	4.5	$30,674	$0	$99,421
37	Metal mining services	$3,648,933	-	$0	4.5	$30,675	$0	$357,669
38	Other nonmetallic minerals services	$3,463,116	-	$0	4.5	$30,675	$0	$336,623
39	Electric power generation - Hydroelectric	$15,130,054	14.3	$3,523,399	2.0	$38,327	$3,311,109	$2,290,283
40	Electric power generation - Fossil fuel	$193,855,873	99.9	$23,437,800	5.9	$184,910	$43,634,186	$28,107,865
41	Electric power generation - Nuclear	$0	-	$0	-	$0	$0	$0
42	Electric power generation - Solar	$17,340,909	18.8	$4,191,309	0.8	$14,560	$3,628,161	$2,590,895
43	Electric power generation - Wind	$0	-	$0	-	$0	$0	$0
44	Electric power generation - Geothermal	$0	-	$0	-	$0	$0	$0
45	Electric power generation - Biomass	$19,379,914	12.6	$2,471,567	0.8	$12,288	$3,802,389	$2,179,553
46	Electric power generation - All other	$0	-	$0	-	$0	$0	$0
47	Electric power transmission & distribution	$137,273,562	85.2	$16,944,557	4.5	$44,566	$31,642,448	$11,839,635
48	Natural gas distribution	$449,696,247	312.9	$61,288,573	17.8	$641,860	$128,915,938	$43,893,314
49	Water, sewage & other systems	$50,545,279	111.6	$13,501,912	4.5	$67,185	$11,857,356	$4,377,646
50	Construction of new health care structures	$48,136,706	273.5	$17,528,123	89.1	$7,068,325	$4,128,408	$335,411
51	Construction of new mfg. structures	$80,330,205	414.1	$27,276,784	130.3	$10,308,105	$3,762,504	$578,381
52	Construction of new power & communication structures	$117,720,148	528.3	$34,694,138	174.0	$13,988,528	$21,852,927	$1,131,884
53	Construction of new educational & vocational structures	$127,197,009	775.3	$58,375,162	170.6	$13,680,506	$10,363,420	$782,035
54	Construction of new highways & streets	$145,743,026	646.1	$44,817,302	197.6	$15,935,421	$17,685,483	$961,588
55	Construction of new commercial structures, including farm structures	$180,111,417	1,117.9	$70,973,921	357.3	$28,098,846	$916,087	$2,226,111
56	Construction of other new nonresidential structures	$119,995,511	658.1	$41,914,139	166.4	$13,453,937	($51,853)	$997,645
57	Construction of new single-family residential structures	$381,677,286	1,645.3	$107,074,424	554.8	$44,228,587	$68,046,013	$4,407,592
58	Construction of new multifamily residential structures	$84,859,103	561.9	$36,576,409	187.8	$15,061,080	$14,693,500	$811,395
59	Construction of other new residential structures	$323,801,123	827.1	$55,214,846	260.1	$20,899,000	$68,548,161	$3,614,879
60	Maint. & repair construction of nonresidential structures	$189,839,821	543.7	$35,453,285	179.5	$14,474,959	$28,906,195	$2,235,174
61	Maint. & repair construction of residential structures	$86,634,749	289.4	$17,701,435	97.4	$6,705,046	$11,271,492	$2,471,639
62	Maint. & repair construction of highways, streets, bridges, & tunnels	$33,524,636	95.4	$6,265,649	30.4	$2,477,188	$5,071,050	$597,781
63	Dog & cat food mfg.	$100,702,818	80.5	$9,645,093	32.3	$127,703	$9,112,911	$3,177,094
64	Other animal food mfg.	$838,593,699	530.8	$62,411,835	96.8	$810,886	$35,441,979	$35,602,280
65	Flour milling	$0	-	$0	-	$0	$0	$0
66	Rice milling	$0	-	$0	-	$0	$0	$0
67	Malt mfg.	$0	-	$0	-	$0	$0	$0
68	Wet corn milling	$0	-	$0	-	$0	$0	$0
69	Soybean & other oilseed processing	$11,707,902	2.1	$137,784	-	$0	$431,203	$131,156
70	Fats & oils refining & blending	$5,518,170	2.2	$175,035	0.4	$3,015	$189,446	$50,340
71	Breakfast cereal mfg.	$0	-	$0	-	$0	$0	$0
72	Beet sugar mfg.	$0	-	$0	-	$0	$0	$0
73	Sugar cane mills & refining	$0	-	$0	-	$0	$0	$0
74	Nonchocolate confectionery mfg.	$1,632,386	3.2	$236,725	0.6	$3,384	$64,875	$17,292
75	Chocolate & confectionery mfg. from cacao beans	$0	-	$0	-	$0	$0	$0
76	Confectionery mfg. from purchased chocolate	$0	-	$0	-	$0	$0	$0
77	Frozen fruits, juices & vegetables mfg.	$502,561,342	829.8	$61,476,935	67.1	$655,580	$48,080,323	$5,059,917
78	Frozen specialties mfg.	$579,000,294	1,420.4	$93,110,745	164.0	$1,099,660	$24,342,869	$4,435,966
79	Canned fruits & vegetables mfg.	$80,379,173	138.6	$8,822,388	11.4	$103,080	$5,773,443	$671,630
80	Canned specialties	$0	-	$0	-	$0	$0	$0
81	Dehydrated food products mfg.	$27,782,318	52.8	$3,489,939	4.4	$62,010	$1,926,580	$260,252
82	Cheese mfg.	$1,530,337,518	1,235.5	$117,117,865	270.3	$1,303,728	$34,207,661	$15,090,013
83	Dry, condensed, & evaporated dairy product mfg.	$112,338,125	72.3	$8,957,149	23.8	$70,718	$9,220,425	$994,531
84	Fluid milk mfg.	$679,420,742	794.9	$71,652,492	102.9	$1,340,208	$33,666,960	$7,709,010
85	Creamery butter mfg.	$671,096,570	393.6	$40,523,318	43.7	$326,431	$64,395,117	$10,576,207
86	Ice cream & frozen dessert mfg.	$40,373,568	86.4	$6,213,185	9.3	$115,181	$2,002,279	$467,635

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Industry Sector Code	Industry Sector	Total Output	Wage and Salary Employment	Employee Compensation	Proprietor Employment	Proprietor Income	Other Property Income	Taxes on Production and Imports Net of Subsidies
87	Frozen cakes & other pastries mfg.	$23,816,590	175.2	$7,689,560	10.3	$988,369	$2,729,681	$3,038,263
88	Poultry processing	$8,931,198	24.1	$1,202,568	1.5	$16,740	$175,214	$89,909
89	Animal, except poultry, slaughtering	$3,803,664	4.6	$465,879	0.3	$64,748	$66,975	$45,880
90	Meat processed from carcasses	$10,002,136	15.4	$1,180,099	2.5	$69,824	($8,654)	$106,761
91	Rendering & meat byproduct processing	$2,771,062	4.6	$465,915	0.3	$64,734	$63,568	$42,329
92	Seafood product preparation & packaging	$0	-	$0	-	$0	$0	$0
93	Bread & bakery product, except frozen, mfg.	$79,971,592	426.8	$21,247,181	30.6	$1,117,605	$7,586,209	$3,630,350
94	Cookie & cracker mfg.	$0	-	$0	-	$0	$0	$0
95	Dry pasta, mixes, & dough mfg.	$0	-	$0	-	$0	$0	$0
96	Tortilla mfg.	$8,844,103	34.5	$1,164,604	2.2	$12,943	$247,935	$113,616
97	Roasted nuts & peanut butter mfg.	$547,131,411	824.4	$57,997,450	95.2	$1,472,550	$82,879,516	$6,337,342
98	Other snack food mfg.	$6,849,200	10.4	$1,192,316	-	$0	$932,869	$72,400
99	Coffee & tea mfg.	$26,453,501	37.8	$2,315,135	3.4	$11,332	$1,422,500	$300,805
100	Flavoring syrup & concentrate mfg.	$0	-	$0	-	$0	$0	$0
101	Mayonnaise, dressing, & sauce mfg.	$39,415,225	58.4	$4,397,228	9.0	$37,387	$2,735,799	$432,355
102	Spice & extract mfg.	$39,859,928	58.5	$4,682,903	9.5	$47,165	$2,112,750	$435,808
103	All other food mfg.	$3,711,864	9.4	$222,593	0.4	$2,546	$64,752	$37,581
104	Bottled & canned soft drinks & water	$0	-	$0	-	$0	$0	$0
105	Manufactured ice	$0	-	$0	-	$0	$0	$0
106	Breweries	$2,269,439	5.4	$381,080	0.5	$131,945	$218,466	$260,911
107	Wineries	$44,456,877	99.8	$7,072,582	6.6	$4,359,349	$4,076,546	$1,884,624
108	Distilleries	$0	-	$0	-	$0	$0	$0
109	Tobacco product mfg.	$0	-	$0	-	$0	$0	$0
110	Fiber, yarn, & thread mills	$7,536,155	16.8	$520,413	6.1	$607,964	$89,560	$145,616
111	Broadwoven fabric mills	$0	-	$0	-	$0	$0	$0
112	Narrow fabric mills & schiffli machine embroidery	$0	-	$0	-	$0	$0	$0
113	Nonwoven fabric mills	$0	-	$0	-	$0	$0	$0
114	Knit fabric mills	$0	-	$0	-	$0	$0	$0
115	Textile & fabric finishing mills	$12,002,458	31.5	$1,112,347	6.7	$731,300	$268,196	$179,127
116	Fabric coating mills	$0	-	$0	-	$0	$0	$0
117	Carpet & rug mills	$0	-	$0	-	$0	$0	$0
118	Curtain & linen mills	$0	-	$0	-	$0	$0	$0
119	Textile bag & canvas mills	$2,723,704	7.0	$331,548	3.2	$765,066	$104,226	$32,017
120	Rope, cordage, twine, tire cord & tire fabric mills	$0	-	$0	-	$0	$0	$0
121	Other textile product mills	$4,505,448	14.8	$615,757	6.3	$1,244,623	$104,407	$56,345
122	Hosiery & sock mills	$369,463	3.0	$82,737	0.7	$14,716	$27,681	$39,150
123	Other apparel knitting mills	$439,493	3.0	$82,745	0.7	$14,724	$35,864	$54,682
124	Cut & sew apparel contractors	$266,208	3.0	$82,721	0.7	$14,704	$5,863	$7,020
125	Men's & boys' cut & sew apparel mfg.	$385,713	3.0	$82,721	0.7	$14,704	$16,140	$10,535
126	Women's & girls' cut & sew apparel mfg.	$40,620,352	3.0	$82,721	165.3	$13,375,205	$50,975	$749,787
127	Other cut & sew apparel mfg.	$449,797	3.0	$82,723	0.7	$14,706	$27,691	$14,279
128	Apparel accessories & other apparel mfg.	$463,556	3.0	$82,726	0.7	$14,706	$34,730	$20,123
129	Leather & hide tanning & finishing	$0	-	$0	-	$0	$0	$0
130	Footwear mfg.	$2,906,548	-	$0	15.6	$1,328,312	$0	$35,495
131	Other leather & allied product mfg.	$0	-	$0	-	$0	$0	$0
132	Sawmills	$30,524,537	53.0	$4,357,335	4.8	($127,135)	$4,299,315	$182,825
133	Wood preservation	$0	-	$0	-	$0	$0	$0
134	Veneer & plywood mfg.	$0	-	$0	-	$0	$0	$0
135	Engineered wood member & truss mfg.	$0	-	$0	-	$0	$0	$0
136	Reconstituted wood product mfg.	$0	-	$0	-	$0	$0	$0
137	Wood windows & door mfg.	$26,689,449	77.9	$5,269,766	13.7	($68,077)	$3,074,181	$158,139
138	Cut stock, resawing lumber, & planing	$0	-	$0	-	$0	$0	$0
139	Other millwork, including flooring	$9,798,737	25.6	$1,802,982	3.9	($44,121)	$1,787,277	$58,010
140	Wood container & pallet mfg.	$71,599,208	252.1	$14,239,785	33.8	($203,163)	$9,056,275	$432,159
141	Manufactured home (mobile home) mfg.	$95,032,257	265.3	$16,826,508	46.7	($173,188)	$11,106,347	$650,372
142	Prefabricated wood building mfg.	$0	-	$0	-	$0	$0	$0
143	All other misc. wood product mfg.	$7,410,628	23.3	$1,435,317	3.2	($24,984)	$1,009,895	$45,210
144	Pulp mills	$0	-	$0	-	$0	$0	$0
145	Paper mills	$0	-	$0	-	$0	$0	$0
146	Paperboard mills	$0	-	$0	-	$0	$0	$0
147	Paperboard container mfg.	$623,737,027	1,080.6	$82,268,455	17.6	$36,629	$42,575,743	$6,850,999
148	Paper bag & coated & treated paper mfg.	$9,717,393	19.6	$1,618,345	0.6	$1,061	$998,518	$100,981
149	Stationery product mfg.	$0	-	$0	-	$0	$0	$0
150	Sanitary paper product mfg.	$0	-	$0	-	$0	$0	$0
151	All other converted paper product mfg.	$0	-	$0	-	$0	$0	$0
152	Printing	$97,920,015	376.9	$25,578,065	168.7	$5,922,245	$9,820,786	$1,060,292
153	Support activities for printing	$0	-	$0	-	$0	$0	$0
154	Petroleum refineries	$40,374,203	-	$0	3.8	$987,750	$0	$299,217
155	Asphalt paving mixture & block mfg.	$0	-	$0	-	$0	$0	$0
156	Asphalt shingle & coating materials mfg.	$0	-	$0	-	$0	$0	$0
157	Petroleum lubricating oil & grease mfg.	$0	-	$0	-	$0	$0	$0
158	All other petroleum & coal products mfg.	$0	-	$0	-	$0	$0	$0
159	Petrochemical mfg.	$0	-	$0	-	$0	$0	$0
160	Industrial gas mfg.	$37,820,144	21.6	$3,022,082	1.8	$48,438	$14,176,506	$618,012
161	Synthetic dye & pigment mfg.	$0	-	$0	-	$0	$0	$0
162	Other basic inorganic chemical mfg.	$0	-	$0	-	$0	$0	$0
163	Other basic organic chemical mfg.	$269,103,075	114.0	$13,361,535	14.3	$238,810	$42,661,477	$3,821,629
164	Plastics material & resin mfg.	$0	-	$0	-	$0	$0	$0
165	Synthetic rubber mfg.	$0	-	$0	-	$0	$0	$0
166	Artificial & synthetic fibers & filaments mfg.	$0	-	$0	-	$0	$0	$0
167	Nitrogenous fertilizer mfg.	$72,112,032	30.2	$3,058,231	1.0	$45,059	$20,455,731	$1,113,976
168	Phosphatic fertilizer mfg.	$0	-	$0	-	$0	$0	$0
169	Fertilizer mixing	$37,815,351	49.6	$3,702,442	1.1	$47,687	$10,433,892	$520,961
170	Pesticide & other agricultural chemical mfg.	$13,713,438	8.4	$379,304	0.3	$6,482	$2,132,259	$247,253
171	Medicinal & botanical mfg.	$6,495,998	9.8	$713,407	0.3	$27,308	$1,669,073	$87,511
172	Pharmaceutical preparation mfg.	$0	-	$0	-	$0	$0	$0
173	In-vitro diagnostic substance mfg.	$13,766,160	30.7	$1,676,981	1.0	$88,078	$2,560,597	$208,698
174	Biological product (except diagnostic) mfg.	$0	-	$0	-	$0	$0	$0
175	Paint & coating mfg.	$5,417,749	6.6	$245,660	0.2	$5,490	$698,364	$91,970

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Detailed IMPLAN Base Industry Data - 2022
ECE Economic Benefit Study – Tulare County 2024

Industry Sector Code	Industry Sector	Total Output	Wage and Salary Employment	Employee Compensation	Proprietor Employment	Proprietor Income	Other Property Income	Taxes on Production and Imports Net of Subsidies
176	Adhesive mfg.	$0	-	$0	-	$0	$0	$0
177	Soap & other detergent mfg.	$0	-	$0	-	$0	$0	$0
178	Polish & other sanitation good mfg.	$7,565,569	16.1	$549,853	0.4	$12,975	$1,230,635	$137,430
179	Surface active agent mfg.	$0	-	$0	-	$0	$0	$0
180	Toilet preparation mfg.	$0	-	$0	-	$0	$0	$0
181	Printing ink mfg.	$0	-	$0	-	$0	$0	$0
182	Explosives mfg.	$0	-	$0	-	$0	$0	$0
183	Custom compounding of purchased resins	$0	-	$0	-	$0	$0	$0
184	Photographic film & chemical mfg.	$0	-	$0	-	$0	$0	$0
185	Other misc. chemical product mfg.	$5,501,497	8.3	$295,547	0.1	$5,284	$520,424	$102,945
186	Plastics packaging materials & unlaminated film & sheet mfg.	$35,467,342	61.9	$5,137,496	10.3	$139,732	$2,178,527	$259,201
187	Unlaminated plastics profile shape mfg.	$91,068,237	150.4	$12,560,327	15.0	$291,830	$10,853,299	$589,688
188	Plastics pipe & pipe fitting mfg.	$370,871,401	473.4	$37,148,570	36.4	$924,482	$48,914,926	$2,840,229
189	Laminated plastics plate, sheet (except packaging), & shape mfg.	$0	-	$0	-	$0	$0	$0
190	Polystyrene foam product mfg.	$133,182,039	261.5	$20,048,344	17.4	$389,799	$10,534,850	$1,071,774
191	Urethane & other foam product (except polystyrene) mfg.	$27,723,869	53.6	$4,252,917	5.5	$87,840	$2,212,467	$204,415
192	Plastics bottle mfg.	$0	-	$0	-	$0	$0	$0
193	Other plastics product mfg.	$14,051,611	39.9	$2,472,963	3.3	$58,614	$843,665	$105,443
194	Tire mfg.	$6,171,281	13.7	$1,082,406	2.3	$20,681	$158,191	$57,808
195	Rubber & plastics hoses & belting mfg.	$0	-	$0	-	$0	$0	$0
196	Other rubber product mfg.	$11,237,621	33.7	$2,312,211	2.9	$47,056	$421,265	$87,952
197	Pottery, ceramics, & plumbing fixture mfg.	$0	-	$0	-	$0	$0	$0
198	Brick, tile, & other structural clay product mfg.	$0	-	$0	-	$0	$0	$0
199	Flat glass mfg.	$0	-	$0	-	$0	$0	$0
200	Other pressed & blown glass & glassware mfg.	$0	-	$0	-	$0	$0	$0
201	Glass container mfg.	$0	-	$0	-	$0	$0	$0
202	Glass product mfg. made of purchased glass	$0	-	$0	-	$0	$0	$0
203	Cement mfg.	$16,441,311	22.8	$1,800,702	2.7	$1,575,235	$2,255,411	$197,313
204	Ready-mix concrete mfg.	$47,297,020	82.6	$7,364,686	11.8	$4,421,694	$4,654,089	$482,954
205	Concrete block & brick mfg.	$0	-	$0	-	$0	$0	$0
206	Concrete pipe mfg.	$5,791,969	14.0	$936,577	1.2	$498,158	$645,186	$80,405
207	Other concrete product mfg.	$0	-	$0	-	$0	$0	$0
208	Lime mfg.	$0	-	$0	-	$0	$0	$0
209	Gypsum product mfg.	$0	-	$0	-	$0	$0	$0
210	Abrasive product mfg.	$0	-	$0	-	$0	$0	$0
211	Cut stone & stone product mfg.	$1,449,979	5.9	$339,841	0.6	$261,312	$102,849	$13,903
212	Ground or treated mineral & earth mfg.	$0	-	$0	-	$0	$0	$0
213	Mineral wool mfg.	$0	-	$0	-	$0	$0	$0
214	misc. nonmetallic mineral products mfg.	$0	-	$0	-	$0	$0	$0
215	Iron & steel mills & ferroalloy mfg.	$14,252,397	7.8	$658,264	-	$0	$989,050	$172,358
216	Iron, steel pipe & tube mfg. from purchased steel	$0	-	$0	-	$0	$0	$0
217	Rolled steel shape mfg.	$0	-	$0	-	$0	$0	$0
218	Steel wire drawing	$0	-	$0	-	$0	$0	$0
219	Alumina refining & primary aluminum production	$0	-	$0	-	$0	$0	$0
220	Secondary smelting & alloying of aluminum	$0	-	$0	-	$0	$0	$0
221	Aluminum sheet, plate, & foil mfg.	$49,591,802	44.4	$2,964,403	4.5	$4,307	$3,467,540	$521,819
222	Other aluminum rolling, drawing & extruding	$103,874,954	167.0	$13,556,038	16.1	($37,244)	$7,203,213	$980,776
223	Nonferrous metal (exc aluminum) smelting & refining	$0	-	$0	-	$0	$0	$0
224	Copper rolling, drawing, extruding & alloying	$0	-	$0	-	$0	$0	$0
225	Nonferrous metal, except copper & aluminum, shaping	$9,103,135	18.5	$1,169,046	1.7	$1,489	$275,257	$86,684
226	Secondary processing of other nonferrous metals	$0	-	$0	-	$0	$0	$0
227	Ferrous metal foundries	$0	-	$0	-	$0	$0	$0
228	Nonferrous metal foundries	$0	-	$0	-	$0	$0	$0
229	Custom roll forming	$0	-	$0	-	$0	$0	$0
230	Crown & closure mfg. & metal stamping	$13,324,626	38.5	$3,327,852	4.6	$70,708	$813,580	$100,770
231	Iron & steel forging	$0	-	$0	-	$0	$0	$0
232	Nonferrous forging	$0	-	$0	-	$0	$0	$0
233	Cutlery, utensil, pot, & pan mfg.	$0	-	$0	-	$0	$0	$0
234	H& tool mfg.	$3,207,021	10.2	$729,705	0.8	$15,318	$376,425	$30,560
235	Prefabricated metal buildings & components mfg.	$111,708,957	219.1	$22,085,830	20.7	$365,041	$9,580,743	$1,068,130
236	Fabricated structural metal mfg.	$35,916,594	75.4	$6,138,590	7.6	$101,233	$2,533,675	$353,591
237	Plate work mfg.	$7,694,028	27.3	$1,629,565	2.4	$27,586	$173,441	$79,453
238	Metal window & door mfg.	$15,009,544	46.2	$3,382,176	4.0	$59,560	$1,106,169	$143,242
239	Sheet metal work mfg.	$10,398,707	32.7	$2,451,303	1.9	$47,991	$778,258	$91,152
240	Ornamental & architectural metal work mfg.	$5,016,627	17.9	$1,454,359	1.3	$29,665	$277,386	$43,147
241	Power boiler & heat exchanger mfg.	$0	-	$0	-	$0	$0	$0
242	Metal tank (heavy gauge) mfg.	$0	-	$0	-	$0	$0	$0
243	Metal cans mfg.	$0	-	$0	-	$0	$0	$0
244	Metal barrels, drums & pails mfg.	$0	-	$0	-	$0	$0	$0
245	Hardware mfg.	$0	-	$0	-	$0	$0	$0
246	Spring & wire product mfg.	$18,188,757	52.7	$4,292,384	3.7	$65,746	$1,115,289	$151,451
247	Machine shops	$7,936,310	45.5	$2,441,817	2.0	$47,937	$378,594	$74,896
248	Turned product & screw, nut, & bolt mfg.	$10,364,831	35.3	$2,177,894	5.0	$53,211	$500,400	$96,012
249	Metal heat treating	$0	-	$0	-	$0	$0	$0
250	Metal coating & nonprecious engraving	$3,863,065	12.5	$407,288	0.5	$7,452	$268,155	$39,575
251	Electroplating, anodizing, & coloring metal	$3,387,834	19.0	$1,218,676	1.5	$27,973	$82,402	$28,471
252	Valve & fittings, other than plumbing, mfg.	$22,379,131	52.3	$4,176,613	7.8	$83,308	$1,725,282	$223,398
253	Plumbing fixture fitting & trim mfg.	$49,118,077	70.3	$4,802,308	6.2	$110,346	$5,639,668	$616,897
254	Ball & roller bearing mfg.	$0	-	$0	-	$0	$0	$0
255	Small arms ammunition mfg.	$0	-	$0	-	$0	$0	$0
256	Ammunition, except for small arms, mfg.	$0	-	$0	-	$0	$0	$0
257	Small arms, ordnance, & accessories mfg.	$0	-	$0	-	$0	$0	$0
258	Fabricated pipe & pipe fitting mfg.	$0	-	$0	-	$0	$0	$0
259	Other fabricated metal mfg.	$4,726,367	14.9	$1,123,948	1.5	$21,912	$315,814	$45,796
260	Farm machinery & equip. mfg.	$260,992,810	348.8	$28,976,150	24.2	$262,375	$25,989,497	$3,211,151
261	Lawn & garden equip. mfg.	$0	-	$0	-	$0	$0	$0
262	Construction machinery mfg.	$0	-	$0	-	$0	$0	$0

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263	Mining machinery & equip. mfg.	$0	-	$0	-	$0	$0	$0
264	Oil & gas field machinery & equip. mfg.	$0	-	$0	-	$0	$0	$0
265	Semiconductor machinery mfg.	$13,272,721	27.6	$1,639,790	0.4	$82,110	$429,427	$140,555
266	Food product machinery mfg.	$7,090,961	23.9	$1,139,722	0.9	$9,840	$196,976	$106,597
267	Sawmill, woodworking, & paper machinery	$0	-	$0	-	$0	$0	$0
268	Printing machinery & equip. mfg.	$0	-	$0	-	$0	$0	$0
269	All other industrial machinery mfg.	$0	-	$0	-	$0	$0	$0
270	Optical instrument & lens mfg.	$1,115,652	3.5	$194,386	-	$0	$110,906	$13,770
271	Photographic & photocopying equip. mfg.	$305,365	0.9	$48,301	-	$0	$14,000	$3,594
272	Other commercial service industry machinery mfg.	$3,807,029	9.6	$443,054	0.2	$3,603	$372,046	$45,512
273	Air purification & ventilation equip. mfg.	$0	-	$0	-	$0	$0	$0
274	Heating equip. (except warm air furnaces) mfg.	$0	-	$0	-	$0	$0	$0
275	Air conditioning, refrigeration, & warm air heating equip. mfg.	$0	-	$0	-	$0	$0	$0
276	Industrial mold mfg.	$0	-	$0	-	$0	$0	$0
277	Special tool, die, jig, & fixture mfg.	$0	-	$0	-	$0	$0	$0
278	Cutting tool & machine tool accessory mfg.	$0	-	$0	-	$0	$0	$0
279	Machine tool mfg.	$3,218,207	11.2	$393,478	0.5	$6,002	$144,527	$39,924
280	Rolling mill & other metalworking machinery mfg.	$0	-	$0	-	$0	$0	$0
281	Turbine & turbine generator set units mfg.	$0	-	$0	-	$0	$0	$0
282	Speed changer, industrial high-speed drive, & gear mfg.	$0	-	$0	-	$0	$0	$0
283	Mechanical power transmission equip. mfg.	$0	-	$0	-	$0	$0	$0
284	Other engine equip. mfg.	$0	-	$0	-	$0	$0	$0
285	Pump & pumping equip. mfg.	$22,047,722	40.4	$3,797,995	2.7	$27,664	$3,520,911	$244,517
286	Air & gas compressor mfg.	$25,758,945	55.8	$4,981,819	5.3	$41,108	$2,168,764	$315,559
287	Elevator & moving stairway mfg.	$0	-	$0	-	$0	$0	$0
288	Conveyor & conveying equip. mfg.	$45,375,505	145.1	$11,649,080	10.7	$73,475	$1,511,731	$546,878
289	Overhead cranes, hoists, & monorail systems mfg.	$0	-	$0	-	$0	$0	$0
290	Industrial truck, trailer, & stacker mfg.	$0	-	$0	-	$0	$0	$0
291	Power-driven h& tool mfg.	$0	-	$0	-	$0	$0	$0
292	Welding & soldering equip. mfg.	$0	-	$0	-	$0	$0	$0
293	Packaging machinery mfg.	$51,846,804	114.9	$11,569,301	11.9	$104,723	$7,661,391	$543,263
294	Industrial process furnace & oven mfg.	$0	-	$0	-	$0	$0	$0
295	Fluid power cylinder & actuator mfg.	$0	-	$0	-	$0	$0	$0
296	Fluid power pump & motor mfg.	$0	-	$0	-	$0	$0	$0
297	Scales, balances, & misc. general purpose machinery mfg.	$8,574,632	24.6	$2,288,453	1.5	$24,878	$692,852	$87,801
298	Electronic computer mfg.	$0	-	$0	-	$0	$0	$0
299	Computer storage device mfg.	$0	-	$0	-	$0	$0	$0
300	Computer terminals & other computer peripheral equip. mfg.	$0	-	$0	-	$0	$0	$0
301	Telephone apparatus mfg.	$0	-	$0	-	$0	$0	$0
302	Broadcast & wireless communications equip. mfg.	$17,079,936	44.8	$2,715,463	0.2	($5,619)	$1,328,300	$355,721
303	Other communications equip. mfg.	$0	-	$0	-	$0	$0	$0
304	Audio & video equip. mfg.	$0	-	$0	-	$0	$0	$0
305	Printed circuit assembly (electronic assembly) mfg.	$18,537,156	41.2	$1,345,400	-	$0	$1,200,228	$374,198
306	Bare printed circuit board mfg.	$0	-	$0	-	$0	$0	$0
307	Semiconductor & related device mfg.	$43,389,742	62.2	$4,408,896	-	$0	$3,390,384	$927,790
308	Capacitor, resistor, coil, transformer, & other inductor mfg.	$0	-	$0	-	$0	$0	$0
309	Electronic connector mfg.	$0	-	$0	-	$0	$0	$0
310	Other electronic component mfg.	$0	-	$0	-	$0	$0	$0
311	Electromedical & electrotherapeutic apparatus mfg.	$0	-	$0	-	$0	$0	$0
312	Search, detection, & navigation instruments mfg.	$0	-	$0	-	$0	$0	$0
313	Automatic environmental control mfg.	$0	-	$0	-	$0	$0	$0
314	Industrial process variable instruments mfg.	$0	-	$0	-	$0	$0	$0
315	Totalizing fluid meter & counting device mfg.	$28,737,777	65.2	$4,240,199	0.9	($1,737)	$5,908,832	$608,041
316	Electricity & signal testing instruments mfg.	$0	-	$0	-	$0	$0	$0
317	Analytical laboratory instrument mfg.	$0	-	$0	-	$0	$0	$0
318	Irradiation apparatus mfg.	$0	-	$0	-	$0	$0	$0
319	Watch, clock, & other measuring & controlling device mfg.	$0	-	$0	-	$0	$0	$0
320	Blank magnetic & optical recording media mfg.	$8,623,404	4.8	$304,740	-	$0	$753,967	$166,350
321	Software & other prerecorded & record reproducing	$4,066,085	12.2	$578,155	-	$0	$257,294	$91,998
322	Electric lamp bulb & part mfg.	$0	-	$0	-	$0	$0	$0
323	Lighting fixture mfg.	$0	-	$0	-	$0	$0	$0
324	Small electrical appliance mfg.	$0	-	$0	-	$0	$0	$0
325	Household cooking appliance mfg.	$0	-	$0	-	$0	$0	$0
326	Household refrigerator & home freezer mfg.	$0	-	$0	-	$0	$0	$0
327	Household laundry equip. mfg.	$0	-	$0	-	$0	$0	$0
328	Other major household appliance mfg.	$0	-	$0	-	$0	$0	$0
329	Power, distribution, & specialty transformer mfg.	$0	-	$0	-	$0	$0	$0
330	Motor & generator mfg.	$0	-	$0	-	$0	$0	$0
331	Switchgear & switchboard apparatus mfg.	$0	-	$0	-	$0	$0	$0
332	Relay & industrial control mfg.	$0	-	$0	-	$0	$0	$0
333	Storage battery mfg.	$0	-	$0	-	$0	$0	$0
334	Primary battery mfg.	$0	-	$0	-	$0	$0	$0
335	Fiber optic cable mfg.	$0	-	$0	-	$0	$0	$0
336	Other communication & energy wire mfg.	$0	-	$0	-	$0	$0	$0
337	Wiring device mfg.	$0	-	$0	-	$0	$0	$0
338	Carbon & graphite product mfg.	$0	-	$0	-	$0	$0	$0
339	All other misc. electrical equip. & component mfg.	$25,801,189	75.9	$6,012,800	7.0	$268,207	$153,151	$412,265
340	Automobile mfg.	$0	-	$0	-	$0	$0	$0
341	Light truck & utility vehicle mfg.	$0	-	$0	-	$0	$0	$0
342	Heavy duty truck mfg.	$114,469,132	136.7	$6,209,148	2.5	($104,991)	$1,024,720	$687,784
343	Motor vehicle body mfg.	$0	-	$0	-	$0	$0	$0
344	Truck trailer mfg.	$0	-	$0	-	$0	$0	$0
345	Motor home mfg.	$0	-	$0	-	$0	$0	$0
346	Travel trailer & camper mfg.	$0	-	$0	-	$0	$0	$0
347	Motor vehicle gasoline engine & engine parts mfg.	$0	-	$0	-	$0	$0	$0
348	Motor vehicle electrical & electronic equip. mfg.	$258,900	0.5	$35,249	-	$0	$3,219	$2,820
349	Motor vehicle transmission & power train parts mfg.	$0	-	$0	-	$0	$0	$0
350	Motor vehicle seating & interior trim mfg.	$0	-	$0	-	$0	$0	$0

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351	Motor vehicle metal stamping	$13,495,790	34.3	$2,301,865	1.1	($70,135)	$126,258	$89,204
352	Other motor vehicle parts mfg.	$5,228,665	11.0	$575,608	0.2	($11,360)	$48,710	$36,677
353	Motor vehicle steering, suspension component (except spring), & brake systems mfg.	$12,119,537	23.3	$1,579,406	0.7	($44,867)	$161,102	$80,450
354	Aircraft mfg.	$0	-	$0	-	$0	$0	$0
355	Aircraft engine & engine parts mfg.	$0	-	$0	-	$0	$0	$0
356	Other aircraft parts & auxiliary equip. mfg.	$0	-	$0	-	$0	$0	$0
357	Guided missile & space vehicle mfg.	$0	-	$0	-	$0	$0	$0
358	Propulsion units & parts for space vehicles & guided missiles mfg.	$0	-	$0	-	$0	$0	$0
359	Railroad rolling stock mfg.	$0	-	$0	-	$0	$0	$0
360	Ship building & repairing	$0	-	$0	-	$0	$0	$0
361	Boat building	$0	-	$0	-	$0	$0	$0
362	Motorcycle, bicycle, & parts mfg.	$13,747,386	22.1	$1,562,045	-	$0	$4,086,529	$211,993
363	Military armored vehicle, tank, & tank component mfg.	$0	-	$0	-	$0	$0	$0
364	All other transportation equip. mfg.	$0	-	$0	-	$0	$0	$0
365	Wood kitchen cabinet & countertop mfg.	$5,479,216	28.1	$1,318,767	2.7	$450,749	$203,075	$26,820
366	Upholstered household furniture mfg.	$0	-	$0	-	$0	$0	$0
367	Nonupholstered wood household furniture mfg.	$0	-	$0	-	$0	$0	$0
368	Other household nonupholstered furniture mfg.	$0	-	$0	-	$0	$0	$0
369	Institutional furniture mfg.	$0	-	$0	-	$0	$0	$0
370	Wood office furniture mfg.	$0	-	$0	-	$0	$0	$0
371	Custom architectural woodwork & millwork	$0	-	$0	-	$0	$0	$0
372	Office furniture, except wood, mfg.	$0	-	$0	-	$0	$0	$0
373	Showcase, partition, shelving, & locker mfg.	$0	-	$0	-	$0	$0	$0
374	Mattress mfg.	$23,451,012	46.8	$2,561,709	9.0	$950,567	$917,695	$121,354
375	Blind & shade mfg.	$0	-	$0	-	$0	$0	$0
376	Surgical & medical instrument mfg.	$0	-	$0	-	$0	$0	$0
377	Surgical appliance & supplies mfg.	$0	-	$0	-	$0	$0	$0
378	Dental equip. & supplies mfg.	$0	-	$0	-	$0	$0	$0
379	Ophthalmic goods mfg.	$5,155,470	13.0	$974,326	4.1	$490,958	$792,488	$62,820
380	Dental laboratories	$1,902,263	11.8	$618,559	1.5	$315,173	$67,463	$19,506
381	Jewelry & silverware mfg.	$8,113,437	27.9	$895,292	5.7	$150,512	$510,826	$640,184
382	Sporting & athletic goods mfg.	$483,714	1.3	$64,570	0.2	$26,694	$22,665	$7,028
383	Doll, toy, & game mfg.	$0	-	$0	-	$0	$0	$0
384	Office supplies (except paper) mfg.	$0	-	$0	-	$0	$0	$0
385	Sign mfg.	$2,556,294	13.1	$782,189	1.6	$229,130	($65,943)	$26,551
386	Gasket, packing, & sealing device mfg.	$0	-	$0	-	$0	$0	$0
387	Musical instrument mfg.	$0	-	$0	-	$0	$0	$0
388	Fasteners, buttons, needles, & pins mfg.	$0	-	$0	-	$0	$0	$0
389	Broom, brush, & mop mfg.	$0	-	$0	-	$0	$0	$0
390	Burial casket mfg.	$0	-	$0	-	$0	$0	$0
391	All other misc. mfg.	$475,768	1.6	$78,221	0.2	$28,951	$20,152	$5,621
392	Wholesale - Motor vehicle & motor vehicle parts & supplies	$80,189,927	185.2	$12,363,532	9.6	$1,706,108	$11,761,280	$7,129,841
393	Wholesale - Professional & commercial equip. & supplies	$185,897,927	583.4	$40,695,227	42.0	$7,562,387	$20,950,836	$18,585,020
394	Wholesale - Household appliances & electrical & electronic goods	$114,683,821	191.8	$15,529,948	13.3	$2,657,711	$17,482,504	$10,764,662
395	Wholesale - Machinery, equip., & supplies	$236,020,422	661.6	$54,701,338	39.4	$7,503,031	$36,775,383	$25,741,076
396	Wholesale - Other durable goods merchant wholesalers	$177,517,756	502.5	$33,602,385	30.1	$4,995,015	$20,921,912	$19,812,067
397	Wholesale - Drugs & druggistsâ€™ sundries	$78,281,076	97.2	$9,339,323	8.3	$1,302,778	$13,437,488	$3,186,400
398	Wholesale - Grocery & related product wholesalers	$239,776,499	776.2	$77,686,497	59.5	$10,111,221	$33,550,992	$8,195,635
399	Wholesale - Petroleum & petroleum products	$698,725,854	176.0	$21,739,495	9.9	$3,019,970	$19,687,503	$593,654,164
400	Wholesale - Other nondurable goods merchant wholesalers	$547,693,173	1,056.6	$110,819,023	91.6	$14,260,506	$79,241,698	$123,075,233
401	Wholesale - Wholesale electronic markets & agents & brokers	$53,743,892	390.7	$32,580,041	14.3	$5,010,407	$3,865,468	$1,329,935
402	Retail - Motor vehicle & parts dealers	$139,414,224	757.0	$51,152,645	87.4	$4,036,760	$10,263,388	$36,205,116
403	Retail - Furniture & home furnishings stores	$54,394,164	343.9	$16,778,649	87.8	$3,448,521	$3,101,878	$10,114,222
404	Retail - Electronics & appliance stores	$47,002,757	402.1	$19,753,851	62.7	$3,192,501	($2,283,844)	$7,980,551
405	Retail - Building material & garden equip. & supplies stores	$243,924,060	1,455.8	$63,009,779	45.9	$3,766,652	$50,141,604	$62,560,410
406	Retail - Food & beverage stores	$364,428,660	2,994.6	$133,102,808	205.1	$21,228,770	$47,252,128	$48,474,012
407	Retail - Health & personal care stores	$131,180,353	1,028.9	$53,014,913	276.9	$6,382,161	$13,596,103	$14,637,933
408	Retail - Gasoline stores	$211,588,373	900.2	$32,859,756	22.3	$28,634,515	$30,944,120	$46,316,817
409	Retail - Clothing & clothing accessories stores	$220,421,017	1,411.8	$38,755,655	321.4	$6,950,047	$17,506,159	$46,369,540
410	Retail - Sporting goods, hobby, musical instrument & book stores	$89,874,663	825.0	$32,953,740	185.2	$5,971,902	$5,907,279	$14,266,604
411	Retail - General merch& merchandise stores	$394,045,310	3,090.0	$128,377,639	73.2	$833,400	$43,278,385	$92,531,580
412	Retail - misc. store retailers	$110,704,791	1,048.3	$32,521,653	849.1	$15,623,302	($3,482,622)	$22,974,397
413	Retail - Nonstore retailers	$572,348,952	873.7	$36,041,499	1,505.9	$8,718,614	$255,820,637	$59,301,071
414	Air transportation	$7,082,068	0.9	$58,274	17.2	$1,071,420	$56,782	$1,237,971
415	Rail transportation	$39,491,963	71.6	$10,257,699	-	$0	$9,384,181	($2,411,156)
416	Water transportation	$2,017,549	-	$0	2.0	$834,062	$0	$39,951
417	Truck transportation	$843,742,173	2,648.8	$220,892,830	638.6	$68,626,220	$146,732,518	$7,264,944
418	Transit & ground passenger transportation	$93,165,894	396.0	$18,333,694	1,463.6	$25,203,174	$19,118,352	$2,073,892
419	Pipeline transportation	$9,420,443	8.2	$1,523,051	0.8	$365,162	$1,959,335	$1,722,678
420	Scenic & sightseeing transportation & support activities for transportation	$78,144,772	533.5	$35,483,009	78.1	$24,883,965	($7,988,059)	$1,414,041
421	Couriers & messengers	$204,285,132	1,371.6	$76,912,481	1,344.8	$784,321	$91,807,788	$2,048,921
422	Warehousing & storage	$521,860,890	3,746.0	$298,846,702	77.8	$3,274,183	$23,416,257	$2,896,892
423	Newspaper publishers	$11,869,950	56.9	$3,974,604	2.2	$164,176	$3,946,804	$198,319
424	Periodical publishers	$1,952,080	7.3	$561,904	0.4	$26,328	$418,638	$35,080
425	Book publishers	$0	-	$0	-	$0	$0	$0
426	Directory, mailing list, & other publishers	$0	-	$0	-	$0	$0	$0
427	Greeting card publishing	$0	-	$0	-	$0	$0	$0
428	Software publishers	$20,320,878	46.2	$5,115,981	16.4	$977,576	$6,574,082	$596,482
429	Motion picture & video industries	$38,432,378	155.9	$4,331,415	28.6	($443,318)	$3,012,044	$1,271,511
430	Sound recording industries	$11,494,495	10.0	$484,253	6.2	($6,854)	$3,527,761	$1,189,960
431	Radio & television broadcasting	$37,170,970	55.0	$5,346,351	4.9	$7,247,897	$2,133,851	$111,724
432	Cable & other subscription programming	$65,979,113	27.7	$2,780,162	4.5	$5,120,764	$12,299,704	$390,569
433	Wired telecommunications carriers	$69,510,706	163.7	$17,710,716	11.8	($76,694)	$12,361,472	$963,467
434	Wireless telecommunications carriers (except satellite)	$135,596,973	63.4	$7,124,307	6.4	($37,472)	$34,999,907	$1,288,896

Table A-2
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ECE Economic Benefit Study – Tulare County 2024

Industry Sector Code	Industry Sector	Total Output	Wage and Salary Employment	Employee Compensation	Proprietor Employment	Proprietor Income	Other Property Income	Taxes on Production and Imports Net of Subsidies
435	Satellite, telecommunications resellers, & all other telecommunications	$9,677,208	25.8	$2,847,824	3.3	($23,824)	$227,772	$103,457
436	Data processing, hosting, & related services	$12,996,664	11.1	$563,363	15.3	$114,268	$704,943	$209,143
437	News syndicates, libraries, archives & all other information services	$6,570,560	19.5	$1,662,570	0.4	$39,372	$1,127,470	$69,632
438	Internet publishing & broadcasting & web search portals	$20,301,188	14.2	$722,031	3.8	$163,586	$1,343,209	$224,236
439	Nondepository credit intermediation & related activities	$83,167,732	424.0	$42,331,203	88.4	$1,524,886	$846,943	$3,340,031
440	Securities & commodity contracts intermediation & brokerage	$94,209,938	53.8	$9,529,543	1,047.8	$16,455,515	($3,085,298)	$1,176,185
441	Monetary authorities & depository credit intermediation	$361,827,796	794.2	$65,265,815	113.9	$2,179,174	$140,873,060	$8,850,598
442	Other financial investment activities	$146,282,727	84.1	$7,247,775	1,023.9	$10,560,003	$552,871	$2,501,053
443	Direct life insurance carriers	$13,720,980	62.1	$2,966,032	16.0	$52,503	$1,111,754	$1,529,159
444	Insurance carriers, except direct life	$278,382,204	445.4	$28,436,183	140.9	$618,881	$25,271,723	$20,272,281
445	Insurance agencies, brokerages, & related activities	$282,230,965	836.3	$58,280,561	233.7	$1,019,452	$15,685,168	$2,774,014
446	Funds, trusts, & other financial vehicles	$126,833,587	183.6	$21,097,294	396.0	$1,398,843	$3,365,841	$561,720
447	Other real estate	$1,086,321,324	948.2	$51,095,540	4,890.8	$131,807,699	$140,322,994	$31,871,075
448	Tenant-occupied housing	$130,912,901	78.4	$3,295,977	311.6	$9,620,798	$80,302,858	$27,873,393
449	Owner-occupied dwellings	$2,072,621,444	-	$0	-	$0	$1,487,929,264	$229,474,096
450	Automotive equip. rental & leasing	$29,700,417	82.5	$5,043,676	31.1	$1,397,230	$11,679,788	$3,266,767
451	General & consumer goods rental except video tapes & discs	$62,716,402	307.1	$17,980,516	96.3	$4,043,086	$10,413,874	$8,338,903
452	Video tape & disc rental	$17,446,371	90.2	$4,777,510	15.2	$732,273	$2,129,980	$3,175,433
453	Commercial & industrial machinery & equip. rental & leasing	$51,855,821	118.0	$11,091,292	57.0	$3,018,118	$20,584,466	$3,498,734
454	Lessors of nonfinancial intangible assets	$2,226,930	1.8	$24,597	8.1	$126,596	$466,615	$345,262
455	Legal services	$71,385,665	255.9	$17,818,490	188.8	$7,072,912	$13,617,377	$3,724,800
456	Accounting, tax preparation, bookkeeping, & payroll services	$139,657,449	619.1	$38,828,729	369.5	$14,836,025	$24,057,651	$1,348,241
457	Architectural, engineering, & related services	$219,659,003	731.0	$64,456,475	617.2	$30,456,657	$12,473,625	$1,825,271
458	Specialized design services	$6,130,262	21.3	$940,989	9.4	$378,436	$1,366,185	$220,316
459	Custom computer programming services	$47,449,824	333.2	$25,615,129	89.6	$2,813,912	($169,100)	$929,816
460	Computer systems design services	$11,450,103	57.4	$4,325,800	72.9	$3,146,263	($130,185)	$225,049
461	Other computer related services, including facilities management	$2,790,511	8.0	$469,492	6.0	$274,083	$212,881	$54,674
462	Management consulting services	$40,517,830	217.9	$11,810,205	136.0	$5,492,856	$514,246	$434,457
463	Environmental & other technical consulting services	$44,200,462	156.0	$14,931,485	144.9	$6,669,557	$3,051,722	$431,006
464	Scientific research & development services	$320,883,663	1,231.4	$107,570,070	139.6	$4,627,734	$38,690,230	$4,265,433
465	Advertising, public relations, & related services	$26,346,444	71.1	$2,400,635	58.1	$1,314,917	$3,117,908	$465,013
466	Photographic services	$9,271,597	28.4	$997,713	5.7	$247,055	$2,658,464	$499,080
467	Veterinary services	$31,465,181	188.5	$13,617,310	81.2	$4,433,701	$3,442,495	$296,737
468	Marketing research & all other misc. professional, scientific, & technical services	$28,972,972	77.1	$3,217,637	34.6	$1,420,773	$5,284,457	$296,812
469	Management of companies & enterprises	$140,234,997	609.7	$70,012,981	2.4	$611,626	$10,477,828	$1,853,400
470	Office administrative services	$17,017,931	173.0	$12,601,681	70.5	$1,435,927	($9,360,447)	$84,825
471	Facilities support services	$6,119,351	29.7	$1,513,101	6.7	$183,865	$518,842	$29,408
472	Employment services	$828,024,849	5,696.1	$313,228,153	1,759.5	$36,694,583	$114,832,706	$4,201,175
473	Business support services	$51,160,583	467.7	$28,094,577	170.7	$3,504,739	($5,061,506)	$712,897
474	Travel arrangement & reservation services	$15,261,272	25.7	$2,470,185	24.8	$429,551	$1,444,987	$94,949
475	Investigation & security services	$26,828,864	367.5	$15,348,810	84.1	$1,753,442	($44,758)	$303,620
476	Services to buildings	$174,148,891	1,260.9	$55,055,857	288.3	$5,889,194	$19,852,184	$2,570,284
477	L& scape & horticultural services	$104,149,739	820.7	$40,028,147	171.7	$3,655,166	$7,499,648	$1,777,573
478	Other support services	$27,443,946	125.3	$11,104,221	40.1	$834,809	$2,563,444	$208,516
479	Waste management & remediation services	$104,676,466	414.7	$24,163,282	13.3	$705,754	$13,987,890	$4,302,140
480	Elementary & secondary schools	$13,758,505	250.0	$13,975,079	54.8	$484,827	($3,940,103)	$434,287
481	Junior colleges, colleges, universities, & professional schools	$54,251,941	589.8	$27,928,771	164.0	$1,747,174	$5,269,082	$1,808,315
482	Other educational services	$37,875,526	358.8	$15,076,034	54.1	$497,835	$528,779	$1,375,656
483	Offices of physicians	$470,371,261	2,472.0	$266,949,729	695.6	$43,102,928	($43,336)	$3,842,861
484	Offices of dentists	$135,436,439	1,033.4	$66,762,466	173.4	$10,541,867	$20,392,565	$885,074
485	Offices of other health practitioners	$108,014,258	816.7	$42,821,720	107.2	$6,606,978	$34,192,839	$1,400,595
486	Outpatient care centers	$255,382,003	1,637.1	$141,420,736	397.9	$24,351,594	($1,859,344)	$1,616,739
487	Medical & diagnostic laboratories	$32,445,762	172.5	$10,199,266	27.2	$1,647,589	$10,242,660	$267,437
488	Home health care services	$28,986,102	311.0	$20,430,124	51.1	$3,086,213	($155,098)	$223,226
489	Other ambulatory health care services	$52,071,368	354.8	$23,504,378	60.3	$3,811,367	$6,532,626	$381,670
490	Hospitals	$90,627,538	443.5	$40,410,557	10.0	$90,579	$6,738,059	$1,041,625
491	Nursing & community care facilities	$254,794,922	2,725.7	$143,596,681	139.3	$3,505,976	$2,260,580	$5,220,640
492	Residential mental retardation, mental health, substance abuse & other facilities	$52,957,049	674.2	$32,432,794	35.7	$790,579	($6,037)	$813,543
493	Individual & family services	$239,775,750	5,742.4	$150,558,133	771.9	$17,482,357	($2,806,678)	($6,477,924)
494	Child day care services	$31,299,336	296.8	$12,306,787	38.4	$886,701	$13,594,643	($951,964)
495	Community food, housing, & other relief services, including rehabilitation services	$136,657,622	1,318.1	$61,241,258	278.6	$6,400,983	($335,364)	($3,226,339)
496	Performing arts companies	$8,531,175	14.4	$759,053	124.7	$876,776	$287,234	$53,649
497	Commercial Sports Except Racing	$8,113,320	67.1	$967,159	145.0	$2,748,922	($838,272)	$34,071
498	Racing & Track Operation	$4,765,762	26.4	$658,092	32.5	$750,189	$232,230	$67,127
499	Independent artists, writers, & performers	$4,976,351	4.2	$228,164	82.5	$469,472	$243,283	$57,030
500	Promoters of performing arts & sports & agents for public figures	$19,406,431	22.1	$621,963	178.0	$1,297,928	$468,712	$83,737
501	Museums, historical sites, zoos, & parks	$4,503,560	50.4	$2,076,056	-	$0	$124,934	$6,042
502	Amusement parks & arcades	$2,164,415	41.7	$949,458	5.5	$110,174	$80,201	$424,372
503	Gambling industries (except casino hotels)	$27,283,106	147.4	$4,652,803	52.4	$1,561,445	$10,404,530	$1,758,677
504	Other amusement & recreation industries	$13,403,185	275.4	$10,427,014	34.9	$648,838	($2,832,261)	$825,366
505	Fitness & recreational sports centers	$13,409,714	275.0	$6,505,094	18.1	$352,263	$76,230	$810,298
506	Bowling centers	$3,371,356	43.7	$1,445,871	4.8	$114,731	$406,420	$190,283
507	Hotels & motels, including casino hotels	$117,550,377	781.9	$37,825,698	171.6	$5,190,007	$27,602,592	$6,094,337
508	Other accommodations	$35,950,222	350.6	$24,079,830	48.4	$989,999	$2,962,498	$801,418
509	Full-service restaurants	$371,009,579	3,555.6	$113,284,970	338.1	$12,607,356	$42,502,608	$28,625,765
510	Limited-service restaurants	$805,677,492	7,241.6	$190,922,276	567.2	$27,698,788	$68,171,247	$70,187,782
511	All other food & drinking places	$225,975,300	2,543.7	$93,064,011	179.1	$5,803,733	$30,697,675	$12,208,713
512	Automotive repair & Maint. , except car washes	$223,986,369	1,609.1	$91,468,818	497.1	$44,308,670	($12,605,443)	$33,573,421
513	Car washes	$137,183,725	815.2	$46,922,985	124.4	$10,173,632	$9,942,397	$27,393,257

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Industry Sector Code	Industry Sector	Total Output	Wage and Salary Employment	Employee Compensation	Proprietor Employment	Proprietor Income	Other Property Income	Taxes on Production and Imports Net of Subsidies
514	Electronic & precision equip. repair & Maint.	$27,496,595	135.4	$8,042,488	56.8	$3,001,732	$2,053,505	$2,791,520
515	Commercial & industrial machinery & equip. repair & Maint.	$126,364,487	571.6	$42,285,302	284.1	$31,228,006	($2,783,026)	$14,622,902
516	Personal & household goods repair & Maint.	$25,395,279	133.0	$6,508,195	51.0	$2,207,084	$5,719,222	$3,257,939
517	Personal care services	$40,442,697	459.1	$17,139,562	1,184.8	$32,957,758	($19,109,042)	$1,648,390
518	Death care services	$16,176,268	120.8	$5,681,720	359.4	$10,355,377	($5,383,995)	$765,825
519	Dry-cleaning & laundry services	$10,691,071	109.7	$4,100,247	276.6	$7,624,515	($4,288,407)	$601,390
520	Other personal services	$38,019,297	203.5	$9,472,608	440.5	$12,586,306	$2,521,125	$1,876,531
521	Religious organizations	$285,948,827	3,604.9	$180,552,940	102.5	$2,246,736	($118,927,396)	$0
522	Grantmaking, giving, & social advocacy organizations	$44,314,373	180.4	$10,139,068	8.0	$146,360	$16,173,030	$1,332,385
523	Business & professional associations	$13,884,740	57.4	$4,922,938	3.6	$74,175	$2,546,352	$439,506
524	Labor & civic organizations	$36,237,267	218.1	$7,915,238	5.3	$106,592	$11,357,867	$1,160,652
525	Private households	$17,216,600	1,869.2	$17,216,600	-	$0	$0	$0
526	Postal service	$39,820,919	419.5	$39,540,530	-	$0	$264,747	$0
527	Federal electric utilities	$0	-	$0	-	$0	$0	$0
528	Other federal government enterprises	$643,761	1.2	$105,872	-	$0	$495,107	($46,896)
529	State government passenger transit	$0	-	$0	-	$0	$0	$0
530	State government electric utilities	$0	-	$0	-	$0	$0	$0
531	Other state government enterprises	$0	-	$0	-	$0	$0	$0
532	Local government passenger transit	$0	-	$0	-	$0	$0	$0
533	Local government electric utilities	$0	-	$0	-	$0	$0	$0
534	Other local government enterprises	$391,473,723	1,224.6	$95,838,518	-	$0	$52,550,208	($78,620,404)
535	* Not an industry (Used & secondhand goods)	$0	-	$0	-	$0	$0	$0
536	* Not an industry (Scrap)	$0	-	$0	-	$0	$0	$0
537	* Not an industry (Rest of world adjustment)	$0	-	$0	-	$0	$0	$0
538	* Not an industry (Noncomparable foreign imports)	$0	-	$0	-	$0	$0	$0
539	* Employment & payroll of state govt, education	$0	-	$0	-	$0	$0	$0
540	* Employment & payroll of state govt, hospitals & health services	$92,721,927	1,201.9	$84,764,940	-	$0	$7,956,987	$0
541	* Employment & payroll of state govt, other services	$36,104,330	364.8	$33,287,365	-	$0	$2,816,965	$0
542	* Employment & payroll of local govt, education	$1,642,332,857	16,527.0	$1,506,164,719	-	$0	$136,168,138	$0
543	* Employment & payroll of local govt, hospitals & health services	$606,767,932	5,379.5	$559,932,890	-	$0	$46,835,041	$0
544	* Employment & payroll of local govt, other services	$691,049,603	5,653.6	$632,296,401	-	$0	$58,753,202	$0
545	* Employment & payroll of federal govt, military	$72,913,882	732.9	$30,495,467	-	$0	$42,418,415	$0
546	* Employment & payroll of federal govt, non-military	$105,662,754	602.2	$64,685,910	-	$0	$40,976,844	$0
								$2,208,466,168
	Totals, All Sectors	**$42,615,676,183**	**184,500.7**	**$11,396,177,500**	**38,922.3**	**$2,213,081,910**	**$6,494,056,815**	**$4,416,932,336**

Source: IMPLAN Cloud; Tulare County Office of Education; Brion Economics, Inc.; Economic & Planning Systems, Inc.

Appendix B: ECE Facility Needs, Costs, and Funding Options

Appendix B estimates the total cost of building 50% of the current shortfall of Infant/Toddler care, based on a variety of facility types to meet that demand. New ECE care centers (20%), new Family Child Care Homes (40%), renovation of commercial space (10%), expansion of existing centers (10%), and new portable/modular buildings (20%) building costs are estimated. Then, two possible countywide funding mechanisms are analyzed, including a sales tax add-on and parcel tax. These are illustrative in nature to show the possibilities of meeting the shortfall of ECE spaces in the County.

Summary of Findings

- **Average Cost per ECE Space:** The average cost of a new ECE space assuming a mix of new center-based spaces and FCCHS and portables is about **$36,500 per space.** New ECE center spaces cost on average $66,000 per space and renovation is the most expensive option at about $74,000 per space. FCCHs are the most affordable option, however, they do not provide many spaces per FCCH given the maximum license limit of 14 spaces.

- **Estimated Cost of New Infant/Toddler Spaces:** To provide 4,500 new Infant/Toddler spaces, given the mix of spaces listed above, would cost about $164.5 million and $167.8 million assuming a 2% administrative cost.

- **Estimated Teachers for New Infant/Toddler Spaces:** Providing an additional 4,500 spaces for Infants/Toddlers would require roughly 1,290 new early care teachers, excluding additional teacher aides, administrative personnel, and directors. Facility development needs to go hand-in-hand with improving the working conditions in the ECE field to attract a sufficient workforce.

- **Sales Tax Add-On Method of Funding**: A countywide 0.25% sales tax add-on initiative, if approved by voters, could generate about **$27.8 million per year and $556 million over 20 years**. This revenue stream would be ample to construct the 4,500 ECE spaces and could provide additional funding for increased wages and other challenges facing the industry.

- **New Sales Tax per Person per Year:** Conservatively, this 0.25% sales tax measure would result in new sales taxes of **about $61 per person per year** in the County. Businesses would also pay the sales tax and new population growth would increase sales tax revenues and thus, the actual cost per person would be less over time.

- **Parcel Tax Method of Funding**: A new parcel tax would generate enough revenue to fund the new 4,500 spaces as well. The average annual parcel tax would equal about **$96 per year per parcel**. The actual cost per parcel would vary based on land use, density, etc.

- **Pay-As-You-Go Method**: The two above methods assume the financing of 4,500 spaces all at once. A more phased approach to new facility development would cost less in interest and insurance costs and thus, the sales tax and/or parcel tax could be smaller as a result.

- **Public Financing of ECE Facilities and Needs**: Countywide measures, whether parcel taxes or sales tax add-ons, are becoming more popular in California. A new sales tax initiative in Alameda County will generate $150 million per year for children, families, and ECE projects. San Mateo County has had a similar sales tax measure for many years, and most recently funded $37.4 million for the Early Learning and Care Trust Fund in FY 21/22. The City of Oakland has a parcel tax generating $30 million per year for early care and education, preschool, and college access support.

- **Other Mechanisms Cities Can Implement**: Development Agreements, Community Benefits Programs, Developer Impact Fees, and Employer-based ECE are other methods that local jurisdictions can implement to address the need for new ECE facilities. Each of these methods has been used throughout the State to address ECE needs. The County could work with local cities on feasibility studies regarding these methods.

Detailed Analysis

This **Appendix** discusses different financing strategies that can be utilized to help fund the development of ECE facilities in Tulare County. The goal of this analysis is to show how the current shortage of licensed ECE spaces could be alleviated and met. Given the high costs of land and construction, combined with the low-profit margins associated with the ECE industry, providing quality ECE facilities is a challenge faced by communities throughout California. Understanding different financial mechanisms that can help offset costs is important in trying to address the shortage of ECE in the County. Providing public funding for facilities can free up operating income that is normally spent on rent or debt service, allowing for higher wages for staff and covering other operations costs. This analysis is illustrative rather than prescriptive. Should the County move forward with a financing method, a more detailed assessment would be needed to determine how the money would be allocated to providers and what the requirements of such funding would be. For this analysis, only the need for Infant/Toddler care is addressed because:

- TK expansion will continue to meet much of the need for Preschool spaces in the County as it rolls out;
- School Age care is often provided by local schools which have different funding sources;
- Quality Infant/Toddler care addresses the needs of young children when their brains are developing the fastest.

The analysis estimates the cost of addressing **50% of the unmet need or about 4,500 new spaces** for Infant/Toddler care, given the magnitude of the current shortfall. Some parents may continue to use unlicensed care provided by family, friends, and neighbors (FFNs) or provide care themselves by working split shifts and making other care arrangements. Some ECE facilities will be provided by the private sector and/or employers, and thus, the unmet need will be less than 100%.

There are several mechanisms or combinations thereof that could be employed to meet existing shortfalls in the County. For this analysis, the following qualifications should be kept in mind.

- The actual costs of meeting the unmet need could vary depending on the type of building employed, specific site conditions, and infrastructure needs.
- Some facility projects may cost less due to individual circumstances.
- If more "pay-as-you-go" methods are used, financing and bond issuance costs will be less.
- Mechanisms, such as community benefit programs or foundation funding, could be utilized which would reduce overall costs and shift costs to the private sector.
- If cities and the County were to reduce land use and permitting costs and other barriers to developing ECE, this could also reduce facility costs.
- The cost estimates are based on real project costs for various recent ECE facility projects (by type), adjusted for inflation. Actual costs may vary.
- **Land costs for new centers are excluded as the location of new facilities is not known, and land costs can vary greatly.**

Providing an additional 4,500 spaces for Infants/Toddlers would require roughly 1,290 new early care teachers, excluding additional teacher aides, administrative personnel, and directors. Facility development needs to go hand-in-hand with improving the working conditions in the ECE field to attract a sufficient workforce.

As discussed in **Chapter II**, there is currently a shortage of licensed ECE spaces in Tulare County, and this shortage will shift over the next 5 years due to the rollout of universal TK and shifting

demographics in the County. This analysis focuses on the shortage of Infant/Toddler care as of 2023 of approximately 9,027 Infant/Toddler spaces; the analysis focused on the costs of providing funding for 4,513 Infant/Toddler spaces. This analysis assumes a combination of new and expanded center-based care and FCCH care will meet the need.

Summaries of the estimated costs associated with meeting current Infant/Toddler shortfalls and demand for ECE facilities and the various financing mechanisms that can be utilized and possibly implemented are discussed below.

B.1 New ECE Facilities Costs

The average cost per ECE space varies depending on the type of construction project and provider. FCCHs are the least expensive type of facility as care is done in the provider's home. This analysis assumes that the future development of new spaces to meet unmet demand would be broken down into the following proportions for the purpose of estimating costs:

1. 20% - New center construction
2. 40% - Family Child Care Homes
3. 10% - Renovations of commercial space
4. 10% - Expanding existing centers
5. 20% - Portable/modular buildings

This mix of facility types balances the cost of new spaces between high- and low-cost options and reflects the wide range of options available. FCCHs for instance are the least expensive option while renovations of existing centers are the most expensive, on average. These assumptions apply to the unmet demand as of 2023 for Infant/Toddler care. The actual distribution will vary. The overall average cost per space for all types of spaces is $36,500 based on the distribution above. The inclusion of FCCHs skew the average cost per space downward, given the small amount of funding needed for this type of facility; the cost of a home or apartment is not included. The average cost per ECE space by type of development is shown in **Exhibit B-1** below.

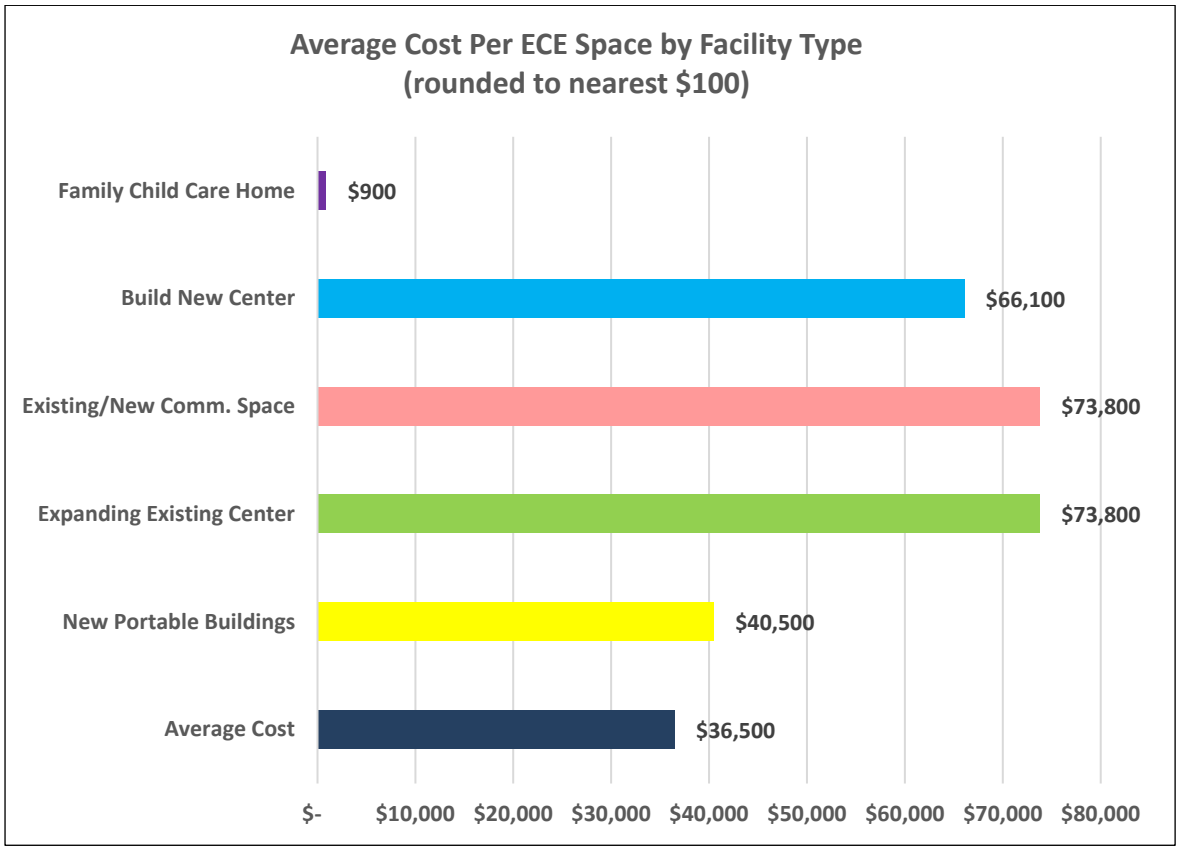
Data on recent ECE center projects was collected as part of this effort to develop average ECE costs per space for the five types of facility development above.[1] Project costs were adjusted to 2023 dollars,

[1] It should be noted that the project costs are for ECE projects that may serve children 0 to 12 years old; however, project cost focused on just children 0 to 4 years old is not available and is considered generally the same. Actual costs may be higher due to the special needs of infants and toddlers.

using the Construction Cost Index published by the State of California and the Bureau of Labor Statistics' Consumer Price Index (CPI). Detailed project cost data by type of project are included in **Appendix C**.

The estimated cost of developing ECE spaces by type to meet 50% of the unmet demand in 2024 for children 0 up to 2.7 years old is calculated in **Table B-1**.

Exhibit B-1



Building a new ECE center (i.e., a new free-standing building) is estimated to cost $66,136 per space, on average.[2] It is assumed that 20% of Infant/Toddler demand would be met through new construction, totaling 903 spaces. The total cost associated with building new center-based spaces is estimated at $59.7 million, as shown in **Table B-1**.

[2] New construction can be less expensive than using older existing buildings due to the high cost of upgrading to current building codes.

FCCHs provide affordable ECE to both families and providers in terms of average costs per space. FCCHs can be small or large, serving up to 8 or 14 children, respectively.[3] The average cost per ECE space for a new FCCH is $921. Costs can be higher if the home needs major repairs or renovation. Only start-up costs, including equipment, furniture, and toys, are included in these cost estimates, and no major renovation costs are assumed. FCCHs are assumed to meet 40% of the unmet need for Infant/Toddler care or a total of 1,805 new FCCH spaces assuming three Infants/Toddlers per FCCH. These new FCCHs would also generate an increased supply of Preschool and School Age spaces, which are needed in the County. The total cost for this option is estimated at $1.7 million. Whether this amount of space could be provided through FCCHs depends on whether providers can find affordable housing or leases that will accommodate FCCHs.

Developing ECE spaces by renovating new or existing commercial space is the most expensive option. Due to building code upgrades and other special safety requirements (that may not exist in existing structures), it costs approximately $73,816 per space on average. It is assumed that 10% of Infant/Toddler demand would be met this way, totaling 451 spaces. The total cost associated with this type of construction is $33.3 million.

Existing ECE centers that may want to expand are assumed to meet another 10% of the demand for Infant/Toddler care. Given that the average cost per space is $73,800, it would also cost $33.3 million for existing centers to expand and meet the needs of 451 Infants/Toddlers.

The use of portable/modular buildings is the least expensive construction option at approximately $40,502 per ECE space. It is assumed that 20% of unmet demand would be met by using portable facilities, serving 903 Infants/Toddlers. Portable/modular buildings could likely be placed at public agency and non-profit sites, church sites or other private sites and would cost about $36.6 million in total.

In total, it would cost approximately $164.6 million to meet the unmet demand of 4,513 spaces for children 0 to 2.7 years old in Tulare County, an average of $36,459 per ECE space, based on the assumptions on the type of development and distribution discussed above. **Exhibit B-2** summarizes the above costs by type of construction or program.

[3] Some programs choose to serve 6, 12, or 13 children as well, but the common license is for 8 or 14 children.

Table B-1
Estimated Facility Costs for Infant/Toddler Care by Type of Space and Age: Unmet Need - 2023
ECE Economic Benefit Study - Tulare County 2024

Type of Facility or Program	Average Cost per Space	Total Infants / Toddlers	Percent of Totals
	Figures rounded to nearest $1000		
Target Number of Infant/Toddler Spaces (1)		**4,513**	
1	**Build New Centers**		
	New Spaces Target	20%	903	20%
	Costs (2)	$66,136	$59,699,000	**36.3%**
2	**New Family Child Care Homes**		
	Spaces Needed	40%	1,805	40%
	Costs (3)	$921	$1,663,000	**1.0%**
3	**Renovations of Commercial Space**		
	New Spaces Target	10%	451	10%
	Costs (4)	$73,816	$33,315,000	**20.2%**
4	**Expand Existing Centers**		
	New Spaces Target	10%	451	10%
	Costs (5)	$73,816	$33,315,000	**20.2%**
5	**New Portable/Modular Buildings**		
	New Spaces Target	20%	903	20%
	Costs (6)	$40,502	$36,559,000	**22.2%**
	Total Spaces	100%	4,513	100%
Total Costs			**$164,551,000**	**100%**
Average Cost by Age Group			**$36,459**	

Note: This is an estimate of new spaces by type; actual development may occur at a different ratio.

(1) See Chapter II: Table II-7 for summary of countywide estimates of unmet need for ECE spaces in 2024.
Analysis targets 50% of the estimated shortfall of Infant/Toddler spaces to be conservative.

(2) See Appendix C: Table C-1 for detailed project cost estimates gathered from recent projects and adjusted for construction cost inflation. Based on average costs per space adjusted to current 2023 dollars.

(3) Based on average costs of FCCH Grants; actual costs could be much higher if building renovations or new bathrooms are required. See Appendix C: Table C-4. Does not include purchase of home or apartment used as FCCH; this is assumed to be owned or leased by provider.

(4) See Appendix C: Table C-2 for detailed project cost estimates gathered from recent expansion and renovation projects. Based on average costs per space adjusted to current 2023 dollars.
Expansion at existing centers can vary depending on the circumstances and whether new bathrooms are required.

(5) Represents the average of renovation of existing commercial and residential costs per space.

(6) See Appendix C: Table C-3 for detailed project cost estimates gathered from recent projects.
Based on average costs per space adjusted to current 2023 dollars.

Sources: Brion Economics, Inc.

Exhibit B-2

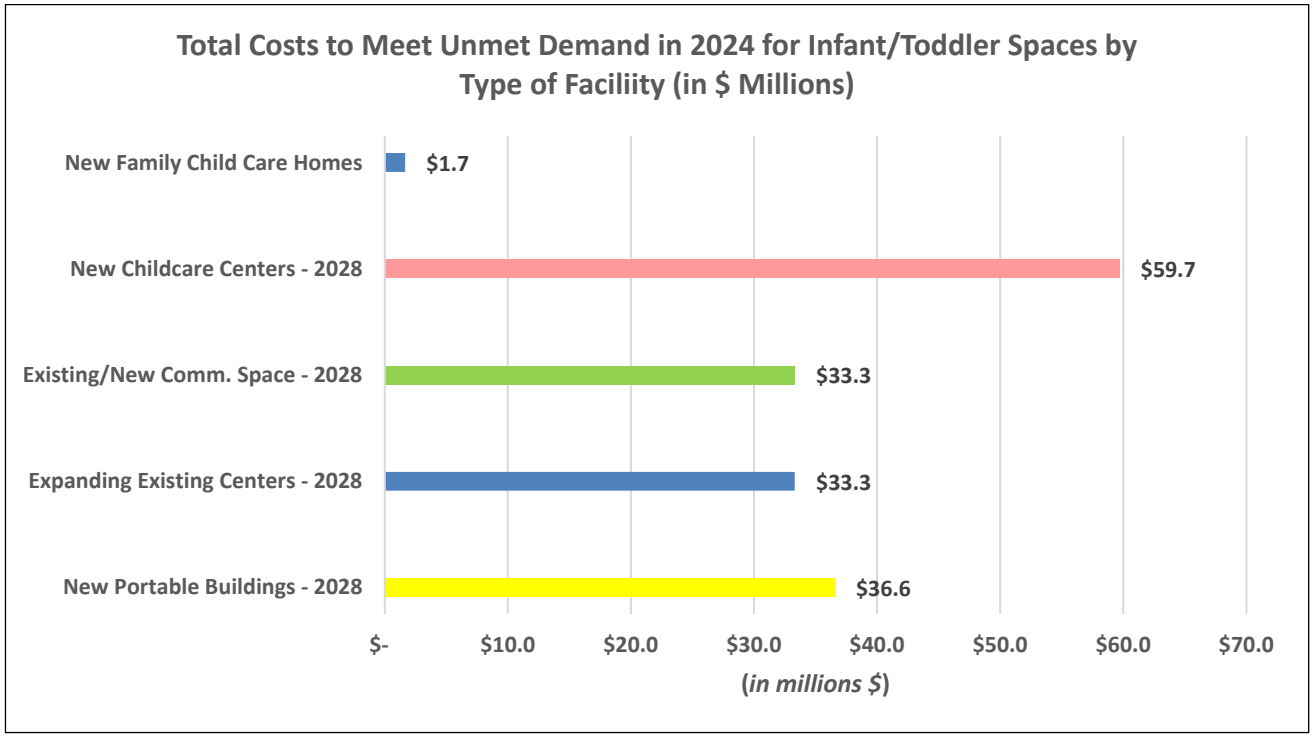


Table B-2 summarizes the costs of meeting 50% of the unmet ECE demand for children 0 to 2.7 years old, or Infants/Toddlers, in the County in 2024. Program administrative costs of 2%, or $3.3 million, are added to the construction cost of $164.6 million for a total of $167.8 million. Assuming the total number of spaces is built over 10 years in equal increments, there would be 451 spaces built each year. The annual cost for each year is estimated to average $16.8 million. Pursuing less than 50% of unmet needs would result in a concomitant reduction in the annual and total costs.

Providing public funding for facilities can free up operating income that is normally spent on rent or debt service, allowing for higher wages for staff and covering other operations costs. This analysis is illustrative rather than prescriptive. Should the County move forward with a financing method, more detailed assessment would be needed to determine how the money would be allocated to providers and what the requirements of such funding would be.

B.2 Potential Countywide Financing Options

The following describes two possible public funding sources that could be used to fund new ECE facilities. These mechanisms could be adopted countywide or by jurisdiction. The following discussion and analyses assume they are adopted countywide. This section focuses on sales tax add-ons and parcel taxes as possible funding mechanisms. The analysis assumes bond financing for the total cost of the facilities needed. If a more pay-as-you-go approach is undertaken total financing costs would be less. This would free up more revenue for constructing new facilities or supporting the ECE workforce.

Sales Tax Add-On Examples

Special add-on sales tax initiatives are usually proposed and used for a specific purpose and require two-thirds approval by voters. Countywide transportation is the most common purpose, but add-on sales taxes can also be for general fund purposes, which only require majority approval. Frequently, add-on sales taxes are dedicated to law enforcement, fire, or emergency medical services. There can also be measures to extend existing special purpose add-on sales taxes, such as Measure K (November 2016) in San Mateo County (see discussion below). Between 2001 and 2013, nine out of ten extensions of add-on sales taxes passed in California.[4] Examples of a Sales Tax Add-On are discussed below.

Alameda County Children's Sales Tax Add-On

Measure C, which was approved by Alameda County voters in 2020, includes a half percent (0.5%) sales tax that would raise an estimated $150 million per year to provide support and enhancements for ECE, preschool, early education, and pediatric health care in Alameda County. The funds will be divided 80/20 into two subaccounts, a Pediatric Health Care Account (20%), overseen by a citizen oversight committee, and an ECE, Preschool, and Early Education Account (80%), administered by First 5 Alameda County (First 5).[5] The sales tax add-on will sunset after 20 years. The add-on sales tax initiative was tied up in courts for a few years but on April 24, 2024, the California Court of Appeal denied review of a Court of Appeal decision upholding Alameda County's Measure C. Measure C was approved by 64% of voters in March 2020 and then contested in court. Plaintiffs argued that California law requires a 66% vote for local governments to raise taxes for a specific purpose, like ECE. Local officials argued that only a simple majority is needed if a tax measure was put on the ballot by voters (which it was) and not by the local government.

[4] A*n Overview of Local Revenue Measures in California Since 2001*, The California Local Government Finance Almanac. Updated March 10, 2014. http://www.californiacityfinance.com/LocalMeasuresSince01.pdf
[5] https://www.fundingthenextgeneration.org/nextgenwp/wp-content/uploads/2021/01/Alameda-Measure-C-FAQ-Final.pdf

Table B-2
Summary of New Demand for Infant/Toddler Spaces and Costs
ECE Economic Benefit Study - Tulare County 2024

Item		ECE Demand - 2023 Total Infants / Toddlers
Unmet Need for ECE Spaces as of 2023 (1)		**(9,027)**
Study Target - Number of Spaces	**50%**	**4,513**
Average Facility Cost per Space	(2)	**$36,459**
SUMMARY OF COST ESTIMATES		*Figures rounded to nearest $1000*
Total Cost of ECE Spaces		$164,551,000
Program Administrative Costs	2%	$3,291,000
With Administrative Costs (2%)		**$167,842,000**
Average Cost per Space w Admin. Costs		$37,188
Average No. of Spaces per Yr. over 10 Yrs.	(3)	451
Average Cost per Year	(3)	**$16,784,000**

(1) See Chapter II: Table II-7 the estimate of Infant/Toddler shortage as of 2024.
Analysis targets 50% of the estimated shortfall of Infant/Toddler spaces to be conservative.
(2) See Table B-1; based on recent average ECE facility costs adjusted for inflation and the mix of spaces to be developed.
(3) Assumes a 10-year development plan.
Sources: Brion Economics, Inc.

County San Mateo Sales Tax Add-On

San Mateo County has an additional 0.5% sales tax levy that was approved in November 2012 as Measure A. In November 2016, Measure K was approved by voters, extending the Measure A sales tax for an additional 20 years to 2043. The current Measure K is generating approximately $80 million per year and was originally estimated to generate $60 million per year. The funds are used to ensure Santa Mateo County's quality of life by retaining and improving critical facilities and services, such as: providing affordable homes for seniors, people with disabilities, veterans, and families; enhancing public transit; combatting human trafficking; addressing sea level rise; maintaining safe schools and neighborhoods; high-quality preschool and reading programs; park maintenance; and low-income healthcare.[6]

[6] https://ballotpedia.org/San_Mateo_County,_California,_Sales_Tax,_Measure_K_(November_2016)

San Mateo County recently released a report about Measure K summarizing the benefits of the measure.[7] As of FY 2021-22, the measure generated a total of $109.8 million. From FY 2013/2024 to FY 2021/2022, the Early Learning and Care Trust Fund has received a total of $37.4 million from Measure K funds.

Sales Tax Add-On for ECE in Tulare County

Table B-3 estimates the revenue that a sales tax add-on of 0.25% for ECE facilities could generate in Tulare County. Current retail taxable sales in Tulare County totaled $11.5 billion in 2023 (most recent annual data available) and a 0.25% sales tax add-on would generate an estimated $27.8 million annually after accounting for administrative costs, or $556.3 million over 20 years.

Using bond financing to fund 50% of existing unmet needs for Infant/Toddler care in the County, or $167.8 million (including administrative costs at 2%), and repaying it through sales tax add-on revenues, requires an annual repayment of $17.0 million. The sales tax add-on revenues would total $27.8 million annually, with a surplus of approximately $10.8 million annually. These additional monies could be used to reduce the cost of care to families, increase ECE workforce wages, and purchase land, or other sites for other ECE-related purposes.

The net gross bond proceeds supported by the 0.25% sales tax add-on total $194.7 million (including financing and issuance costs). Financing assumptions include 6.0% capitalized interest, 7.0% reserve, and 3.0% issuance costs. Total payments, including interest, over 20 years are $339.6 million. There would be an additional $101.7 million generated over 20 years. As mentioned above, these funds could be used to buy land, increase wages for ECE workers, and assist parents with subsidies. The amount of the sales tax add-on and the allowable uses would require more in-depth study and input by the community and decision-makers.

Based on these figures, the average additional annual cost per person in the County is estimated at $61.06 per year or a total of $1,221 over 20 years. This represents 3.2% of the current annual sales tax paid per person per year. This analysis excludes visitor and business-to-business taxable sales, which would also be subject to the increased sales tax rate. So, the actual annual cost per person would be less.

[7] https://www.smcgov.org/ceo/news/ten-years-progress-report-measure-k-half-cent-sales-tax

Table B-3
Potential Sales Tax Add-On - Initiative Method
ECE Economic Benefit Study - Tulare County 2024

Item	Rates	Estimated Costs
Current Retail Taxable Sales in Tulare County - 2023 (1)		**$11,470,863,734**
Additional Sales Tax Rate	0.25%	$28,677,159
Administrative Costs	3.00%	($860,315)
Net Annual Proceeds		$27,816,845
Over 20 Years in Constant Dollars	**20**	**$556,336,891**
Bond Financing		*Figures rounded to nearest $1000*
Infant/Toddler Construction Costs	100%	$164,551,000
Program Administration	2%	$3,291,000
Total Bond Proceeds Needed		**$167,842,000**
Financing Costs		
Capitalized Interest	6%	$10,070,000
Reserve	7%	$11,750,000
Issuance Costs	3%	$5,040,000
Subtotal, Gross Bond Amount	16%	**$194,702,000**
Annual Payment Required	6%	**$16,980,000**
Payment Supported by Additional Sales Tax		$27,820,000
Additional Sales Tax Surplus or (Shortfall)		$10,840,000
Net Bond Proceeds Supported by Additional Sales Tax		**$269,570,000**
Total Payments over 20 years		**$339,600,000**
Surplus or (Shortfall) (2)		**$101,728,000**
Average Cost per Household		
Population in County - 2023 (3)		469,680
Current Average Taxable Sales per Person		$24,423
Average Sales Tax Paid per Person per Year (4)	7.75%	$1,893
Annual Additional Cost per Person per Year		**$61.06**
Cost over 20 Years per Person		$1,221
Percent of Average Annual Sales Tax Paid		3.2%

(1) From CA Board of Equalization - Annual Taxable Sales in Tulare County - 2023
https://www.cdtfa.ca.gov/dataportal/dataset.htm?url=TaxSalesByCounty

(2) A surplus would help guard against inflation. However, increasing cost of goods, and thus taxable sales, will also guard against increases in project costs and could be used to increase wages of child care workers and support families.

(3) CA Department of Finance E-5 Report, Jan. 1, 2023, see Table II-1.
Note the cost per person would decrease over time as population increases.

(4) The actual rate may vary by City within the County based on local policies and sales taxes.
The rate per person is likely overstated as employees not living in Tulare, tourists, and businesses will also pay sales taxes.

Sources: CA Board of Equalization; CA Department of Finance; Brion Economics, Inc.

Parcel Taxes

Parcel taxes are excise taxes on real property based on either a flat per-parcel rate or a varying rate depending on use, size, number of units, and/or square feet of building space on each parcel. Parcel taxes can be used for any municipal purpose, and the majority of those proposed in California have been for public safety or medical services.[8] In California, increasing or extending a parcel tax, which is imposed for a special purpose, requires two-thirds approval by voters based on Proposition 218, which was passed by voters in 1996.[9] In a study by the California Local Government Finance Almanac of 396 parcel tax ballot measures in California between 2002 and 2013, 108 or 45% of them passed. Another 103, or 26%, passed with over 55% of the "yes" vote but failed to achieve the two-thirds majority. The remaining 113, or 29%, received less than 55% of the "yes" vote. This review also found that the most successful parcel tax measures were broad-based public safety measures that allowed funds to be used for police, fire, and medical services.[10]

Parcel tax rates are normally weighted in some capacity, such as by size of parcels, development density of parcels, or demographics of parcels. Rates often vary by land use depending on the nature of the services to be funded. Parcel taxes are commonly used to finance municipal bonds that are sold to fund infrastructure such as school projects or new parks and open spaces as well as services such as police, fire, or medical services. The annual revenues from the parcel tax are used to make annual debt service payments and cover administration costs and required reserves.

According to a California City Finance presentation, the California Constitution only allows two types of taxes imposed upon a parcel of property:[11]

- Ad valorem property tax
- Special tax receiving two-thirds voter approval

A publicly issued parcel tax initiative requires two-thirds voter approval regardless of how (or if) the proceeds are restricted. However, a citizen-driven parcel tax initiative only requires a majority of 50% or more approval. Other parcel tax requirements include:

[8] A*n Overview of Local Revenue Measures in California Since 2001*, The California Local Government Finance Almanac. Updated March 10, 2014. www.CaliforniaCityFinance.com
[9] https://www.californiataxdata.com/pdf/Proposition218.pdf
[10] Ibid.
[11] http://www.californiacityfinance.com/CSMFOrevFunTwo190207p.pdf

- Flat per-parcel rate, per land use, size of parcel, or number of units and sqft of development
- To distinguish from property tax, the ordinance should be an excise tax for revenue-raising purposes on the use of municipal services (rather than property ownership).
- Rates should show rough proportionality to the use of services.

Property assessments are similar to parcel taxes and may be created to impose assessments or special taxes that require majority approval. However, a civil engineer's report is required to demonstrate the special benefit being conferred to the parcels being assessed. Assessment districts are commonly used for infrastructure whose cost can be directly apportioned to individual properties; these types of assessment districts are not well-suited to facilities such as ECE that provide a broader general benefit.

City of Oakland Children's Initiative

The City of Oakland adopted a parcel tax to fund ECE needs in the city in 2018. The Oakland Children's Initiative collects an annual parcel tax to support ECE and preschool programs in the city, as well as to provide some money for college access. It is estimated that the parcel tax raises over $30 million annually. The money goes toward expanding access to high-quality preschool, initially prioritizing programs for young children in Oakland Unified School District and the City of Oakland Head Start. The Initiative was challenged in court by a property owner group but was approved by the State Appeals Court.[12]

Parcel Tax Estimates for ECE in Tulare County

One way for Tulare County to address its current shortfall of ECE spaces is to adopt a parcel tax that would be earmarked for ECE facilities. As discussed above, this would have to be done as a ballot initiative and would require a two-thirds "yes" vote to pass. If put forward by citizens without the involvement of public agencies, a 50% plus majority is allowed.

Table B-4 calculates potential parcel tax revenue. In this example, the revenue is estimated to fund 50% or $164.5 million of the unmet need for Infant/Toddler spaces in Tulare County as of 2023.[13] For simplicity, we assume the parcel tax would be a flat average tax per parcel on all residential and non-residential uses. The total number of parcels in the County equals 177,326 as of 2023. The current total assessed value in the County is about $46.05 billion. Financing assumptions include 6.0% capitalized interest, 7.0% reserve, and 3.0% issuance costs or the same as with the sales tax analysis above. A parcel tax with bond financing would generate a total gross bond amount of $194.7 million, including

[12] State appeals court rules in favor of Oakland's embattled Measure AA tax (sfchronicle.com)
[13] Includes 2% administrative costs.

issuance costs. The annual payment to fund this level of bond payment would equal about $17.0 million per year. The costs divided by existing parcels result in an average parcel tax of $96 per parcel per year, as shown in **Table B-4**. Over 20 years, this would generate the required $339.6 million (including interest, administrative, and issuance costs) to pay back the bond measures. The gross bond amount as a percent of the total current assessed value is 0.42% or less than one-half percent.

Table B-4
Potential Parcel Tax Method
ECE Economic Benefit Study - Tulare County 2024

Item	Rates	No. of Parcels	2023 Assessed Value
Current Assessed Value (1)			
Total, All Parcels		**177,326**	**$46,051,038,995**
Bond Financing		*Figures rounded to nearest $1000*	
Infant/Toddler Facility Construction Cost	100%	$164,551,000	
Program Administration	2%	$3,291,000	
Total Bond Proceeds Needed		**$167,842,000**	
Financing Costs			
Capitalized Interest	6%	$10,070,000	
Reserve	7%	$11,750,000	
Issuance Costs	3%	$5,040,000	
Subtotal, Gross Bond Amount	16%	**$194,702,000**	
Number of Years	20		
Annual Payment	6%	**$16,980,000**	
Total Payments over 20 Years		**$339,600,000**	
Annual Cost per Parcel (2)			**$96**
Revenue over 20 Years			**$339,600,000**
Gross Bond Amount as Percent of Total Assessment Value			**0.42%**

(1) See https://tularecounty.ca.gov/assessor/news/annual-reports/assessors-annual-report-2023/assessors-annual-report-2023/, page 10.

(2) This is a simple allocation of costs by parcel.
The actual assessments would be weighted by parcel size and density.
Current Assessed Value is not the current market value of property due to Proposition 13.
Affordable housing projects could be exempt if they include ECE facilities.
Senior housing could be exempt and vacant land would likely be excluded.

Sources: Tulare County Assessor's Office; Brion Economics, Inc.

If a parcel tax were to be adopted, it would require a detailed financial study to allocate the costs to ECE facilities based on the services required by various land uses, similar to a nexus study for developer impact fees. The costs of employee demand would be met by residential uses for those employees who work and live in Tulare County for example. The cost of non-resident employees could be levied on non-residential parcels. Thus, the actual parcel rate could vary from this illustration. It would also need to be decided if the goal is to raise 50% of the funding required to meet the unmet need or some smaller or larger amount.

If the County were to create grant programs with the proceeds of either a sales tax or parcel tax and allocate funds raised per year, this could reduce issuance costs. Other methods of funding mechanisms and policy options to address ECE facility needs are discussed briefly below.

B.3 Other Local Funding and Policy Mechanisms

This section discusses other funding and policy mechanisms that can be adopted at the local or city level, including large development projects. These methods do not lend themselves to countywide policy or initiatives.

Developer Impact Fees

Counties and cities have the option of adopting developer impact fees to fund infrastructure and public facilities projects under Government Code 66000 or the Mitigation Fee Act (MFA). Development impact fees are exclusively for capital improvements serving new development to offset the impact of a particular project or new growth and cannot fund existing deficiencies. Nor can a city charge new development for higher standards than currently exist in a community. To adopt a fee, it is necessary to identify the additional capital facilities needed to maintain the current level of service for the applicable improvements. Higher standards of service can be adopted if there is a plan to bring existing development up to that standard. A developer impact fee is calculated based on projected facility costs and then distributed across land use based on expected growth, normally over 20 years. Developer impact fees are adopted by local decision-makers, such as a city council or board of supervisors, by resolution and ordinance before they can be levied on future development projects in a jurisdiction. Building departments normally implement and collect developer impact fees when building permits are pulled but they can also be paid at the certificate of occupancy issuance in rare cases.

Cities that have adopted a developer impact fee for ECE include the cities of South San Francisco, San Mateo, Palm Desert, Berkeley, and San Francisco to name a few. This type of mechanism is useful where there is a large amount of expected growth and development.

Given the large existing deficiency associated with ECE facilities and the current population, a developer impact fee would need more evaluation.

Community Benefits Programs (CBPs)

Community benefit zoning and other community benefits programs represent newer land use mechanisms that cities and counties are employing to garner public improvements, services, and facilities from new development in exchange for high-density or other special development approvals. In some cases, this type of program is responding to rapid growth and attempts to mitigate some of the impacts of growth on communities. There is a wide range of CBPs, and some of these programs attempt to capture a portion of the additional real estate value created by higher-density development from projects. Benefits can be provided directly within or near the project development, or payments can be made to the city by the developer at some agreed-upon amount and time. Some city CBPs have established a fee, such as $20 per sqft, on additional development beyond a certain threshold or height.

Development Agreements

Development Agreements (DAs) are contractual agreements between a developer and a jurisdiction that set standards and conditions that govern the development of a property. The developer gets certainty that the project will not be subject to any changes in zoning laws over the course of the development and in return, the developer is contracted to provide benefits, such as infrastructure improvements, public open space, or payment into funds, such as "in lieu" fee funds.[14] DAs do not require nexus or any defined formula for what is included; rather, it is completely negotiated and up to the two parties involved to define what is included and required. Given the time and expense of negotiating DAs, only large projects typically include this method. Jurisdictions in Tulare County could require larger-scale projects to provide ECE facilities or pay an in-lieu fee to help fund ECE facilities through the DA process.

Employer-Based ECE

Employer-based ECE is an excellent solution to the need for ECE for employees of larger businesses. Parents of infants and toddlers prefer to have their children close to their place of work if they are using licensed care. Typically, the employers provide the facility for the ECE operator or construct a new center on land they already own or in building space they own or lease. In this situation, the ECE operator or provider does not have the expense of providing the facilities and, thus, can operate at a higher margin. The provider may pay rent, usually at below market rates, however. Often the employer

[14] Article, *The Rise of the Development Agreement*, January 11, 2015. http://www.planetizen.com/node/73227/rise-development-agreement

subsidizes the employees' ECE tuition costs at some percentage or offers other support in the form of maintenance costs to the provider. Often, employer-sponsored ECE centers also offer spaces to the community to ensure that the centers are operating at or close to full capacity. The fact that the employer generally provides space for ECE equates to a "subsidy" regardless of whether they subsidize monthly fees for the employees or lease costs.

B.4 Economic Benefits of New Facility Construction

This section addresses the potential additional economic benefits of building new ECE facilities serving Infants and Toddlers in Tulare County. As discussed above, the cost of new facilities, including administrative costs, totals $167.8 million to serve 50% of the current shortfall of Infant/Toddler spaces in the County (see **Table B-2**). The benefits per $1.0 million in direct construction spending, as documented in the IMPLAN® software, are used to analyze the additional benefit from new construction in the ECE industry. The benefits are quantified in terms of output, employment, and labor income as with the benefits of the ECE industry discussed above.

An additional economic measure, Value Added, is also presented for this analysis. Value Added represents the difference between Output and the cost of Intermediate Inputs throughout a defined economy during a specified period. It equals gross Output (sales or receipts and other operating income, plus inventory change) minus intermediate inputs (consumption of goods and services purchased from other industries or imported). Value Added is equivalent to the industry's contribution to GDP.[15]

Table B-5 summarizes the economic multiplier effects of $1 million in construction spending in terms of direct, indirect, and induced benefits. The total output of $1 million in construction expenditures is $1.37 million or an additional $372,300 in additional output. The direct employment impact associated with $1 million in spending is 7.6 jobs, and the total impact in terms of employment is 9.74 jobs or an additional 2.13 jobs for each $1 million. The direct labor income associated with $1 million in spending totals $556,500, and the total labor income equals $673,700 or an additional $107,200 in economic impact on labor income. The direct value-added impact is $654,100, and the total value-added equals $866,900 or an additional $213,000 in value-added activity.

Based on this general data on the economic multiplier effects of construction spending, **Table B-6** summarizes the economic benefits of new construction of ECE facilities addressing 50% of the total current shortfall of Infant/Toddler spaces with a cost of $167.8 million. The construction of these new Infant/Toddler spaces would generate a total of $230.3 million in total output or an increase in

[15] See https:/2.13upport.implan.com/hc/en-us/articles/360017144753-Understanding-Value-Added-VA.

economic activity of 137% over direct spending. This construction activity would generate 1,276 direct construction jobs and a total of 1,634 jobs, including indirect and induced jobs. The direct labor income associated with the new construction would generate a total benefit of $113.1 million in labor income. In terms of value-added economic activity, the direct benefit would amount to $109.8 million, and the total value-added effect would equal $145.5 million.

Table B-5
Economic Multiplier Effects from $1 Million Spending on Construction in Tulare County
ECE Economic Benefit Study – Tulare County 2024

Type of Benefit/Impact	Direct Effect (1)	Indirect Effect (2)	Induced Effect (3)	Total Effect (4)
Output	**$1,000,000**	$119,120	$253,137	$1,372,257
Percent Distribution	72.9%	8.7%	18.4%	100.0%
Employment	7.60	0.53	1.60	9.74
Percent Distribution	78.1%	5.5%	16.5%	100%
Labor Income	$566,489	$33,366	$73,846	$673,700
Percent Distribution	84.1%	5.0%	11.0%	100%
Value Added	$654,112	$62,339	$150,449	$866,900
Percent Distribution	75.5%	7.2%	17.4%	100%

(1) Represents the direct economic activity of the construction industry for $1 million in spending in the County, including number of jobs, labor income, value added, and direct spending.

(2) Represents the economic activity associated with construction in terms of goods and services the industry uses or purchases.

(3) Represents the jobs and spending in the local economy from the spending of direct wages and salaries associated with construction.

(4) The combined benefit or impact of direct, indirect, and induced activity associated with construction.

Source: IMPLAN Cloud; Brion Economics, Inc.; Economic & Planning Systems, Inc.

Apart from the direct benefit of more Infant/Toddler spaces benefiting parents who require such care, there would be additional economic benefits to the construction industry during the construction phase. Construction jobs are also relatively well-paying jobs with average wages at $29.07 per hour and $60,500 annually for full-time work in Tulare County (**see Table III-4**).

Table B-6
Economic Multiplier Effects from Spending on New Infant/Toddler Facility Construction
ECE Economic Benefit Study – Tulare County 2024

Type of Benefit/Impact	Direct Effect (1)	Indirect Effect (2)	Induced Effect (3)	Total Effect (4)
Output	**$167,842,000**	$19,993,300	$42,487,008	$230,322,308
Percent Distribution	72.9%	8.7%	18.4%	100.0%
Employment	1,276	89	269	1,634
Percent Distribution	78.1%	5.5%	16.5%	100%
Labor Income	$95,080,596	$5,600,180	$12,394,458	$113,075,234
Percent Distribution	84.1%	5.0%	11.0%	100%
Value Added	$109,787,510	$10,463,077	$25,251,695	$145,502,282
Percent Distribution	75.5%	7.2%	17.4%	100%

See Appendix B for estimates of meeting 50% of the Infant/Toddler facility space shortfall.

(1) Represents the direct economic activity of the new spending on infant/toddler facilities construction in the County, including number of jobs, labor income, value added, and direct spending.

(2) Represents the economic activity associated with new infant/toddler facilities in terms of goods and services the industry uses or purchases.

(3) Represents the jobs and spending in the local economy from the spending of direct wages and salaries associated with the construction of new infant/toddler facilities.

(4) The combined benefit or impact of direct, indirect, and induced activity associated with the construction of new infant/toddler facilities.

Source: IMPLAN Cloud; Brion Economics, Inc.; Economic & Planning Systems, Inc.

Appendix C: ECE Facility Cost Estimates by Type of Facility

Appendix C Table Index
Supporting Data for Financial Analysis
ECE Economic Benefit Study - Tulare County 2024

Source: Brion Economics, Inc.

Table C-1
Detailed Sample New Construction
Child Care Center Project Cost Estimates
ECE Economic Benefit Study - Tulare County 2024

No.	Type	Program	Year	2023 Inflation %	Construction Type	Facility Budget including FF&E	2023 Adj. Budget	Total Sqft of Bldg. Space	# of Children or Spaces	Sqft of Bldg. Space per Child	Adj. Base Tenant Improvements per sqft (1)	Included FF&E %	Total Cost per Bldg. Sqft	Total Cost per Child Care Space	Additional Outdoor Space Budget
1	New construction - conventional	Santa Barbara Co Project - Childcare Center	2023	0%	New construction	$8,000,000	$8,000,000	9,500	100	95	NA	NA	NA	NA	NA
2	New modular construction	New Center in SCC	2023	0%	New construction	$3,368,000	$3,368,000	5,400	58	93	NA	NA	624	$58,069	3,600
3	New construction - conventional	Build Up San Mato Co Childcare Center Project	2022	109%	New construction	$2,000,000	$2,186,000	NA	60	NA	NA	NA	NA	NA	NA
4	New construction - conventional	Build Up San Mato Co Childcare Center Project	2022	109%	New construction	$3,500,000	$3,825,500	NA	70	NA	NA	NA	NA	NA	NA
5	New construction - conventional	Center - I/T - Preschool	2014	160%	New construction	$6,528,000	$10,427,983	20,000	190	105	$521.40	NA	$521	$54,884	$475,000
6	New construction - conventional	Center - I/T - Preschool	2014	160%	New construction	$6,152,800	$9,828,630	18,000	152	118	$546.03	NA	$546	$64,662	$378,000
7	New Modulars	Center - I/T - Preschool	2014	160%	New modular (not portables) construction	$5,565,252	$8,890,066	20,100	142	142	$442.29	NA	$442	$62,606	$265,000
8	New construction - conventional	Center - I/T - Preschool	2014	160%	New construction	$5,328,608	$8,512,046	14,800	114	130	$575.14	NA	$575	$74,667	$196,000
9	New Modulars	Center - I/T - Preschool	2014	160%	New prefab - Project Frog	$6,819,762	$10,894,051	14,000	114	123	$778.15	NA	$778	$95,562	NA
Average						**$5,251,380**	**$7,325,808**	**14,543**	**111**	**115**	**$572.60**	**NA**	**$581**	**$68,408**	**$263,520**

Note: Does not include building landscaping or design costs; this can typically cost 10% of outdoor space budget. Inflation Rates are from https://www.dgs.ca.gov/RESD/Resources/Page-Content/Real-Estate-Services-Division-Resources-List-Folder/DGS-California-Construction-Cost-Index-CCCI

(1) TI costs are included in total project costs per sqft but not available for all projects.

Sources: Katheryn Tama; Eileen Monahan; Build Up San Mateo; Brion Economics, Inc.

Table C-1
Detailed Sample New Construction
Child Care Center Project Cost Estimates
ECE Economic Benefit Study - Tulare County 2024

No.	Type	Program	Year	Sqft of Outdoor Space	2023 Adj. Outdoor Space Budget	Total Cost of Sqft of Outdoor Space	Total Cost per Child of Outdoor Space	Total Center & Outdoors Costs	Overall, Total Cost Per Child
1	New construction - conventional	Santa Barbara Co Project - Childcare Center	2023	NA	NA	NA	NA	$8,000,000	$80,000
2	New modular construction	New Center in SCC	2023	NA	NA	NA	NA	$3,368,000	$58,069
3	New construction - conventional	Build Up San Mato Co Childcare Center Project	2022	NA	NA	NA	NA	$2,186,000	$36,433
4	New construction - conventional	Build Up San Mato Co Childcare Center Project	2022	NA	NA	NA	NA	$3,825,500	$54,650
5	New construction - conventional	Center - I/T - Preschool	2014	15,800	$758,776	$48	$3,994	$11,186,759	$58,878
6	New construction - conventional	Center - I/T - Preschool	2014	15,000	$603,826	$40	$3,973	$10,432,456	$68,635
7	New Modulars	Center - I/T - Preschool	2014	15,000	$423,317	$28	$2,981	$9,313,384	$65,587
8	New construction - conventional	Center - I/T - Preschool	2014	11,500	$313,095	$27	$2,746	$8,825,141	$77,414
9	New Modulars	Center - I/T - Preschool	2014	NA	NA	NA	NA	$10,894,051	$95,562
Average				**14,325**	**$524,754**	**$36**	**$3,423**	**$7,559,032**	**$66,136**

Note: Does not include building landscaping or design costs; this can typically cost 10% of outdoor space budget. Inflation Rates are from https://www.dgs.ca.gov/RESD/Resources/Page-Content/Real-Estate-Services-Division-Resources-List-Folder/DGS-California-Construction-Cost-Index-CCCI

(1) TI costs are included in total project costs per sqft but not available for all projects.

Sources: Katheryn Tama; Eileen Monahan; Build Up San Mateo; Brion Economics, Inc.

Table C-2
Detailed Sample Child Care Renovation Project Cost Estimates
ECE Economic Benefit Study - Tulare County 2024

No.	Type	Program	Year	2023 Inflation %	Construction Type	Facility Budget including FF&E	2023 Adj. Budget	Total Sqft of Bldg. Space	# of Children or Spaces	Sqft of Bldg. Space per Child	Total Cost per Bldg. Sqft	Total Cost per Child Care Space	Additional Outdoor Space Budget
Residential Renovation Projects													
1	Remodel Residential	Center - Preschool	2014	160%	Renovation	$572,700	$914,845	1,725	24	72	$530	$38,119	NA (3)
Commercial Renovation Projects													
2	Build Up San Mateo Co. Renovation/Expansion (2)	Center - Preschool and Infants/Toddlers	2022	109%	Renovation	$2,032,943	$2,222,007	NA	81	NA	NA	NA	NA
3	LIIF Case Study Improvements in existing shell - in affordable housing	Center - Infants/Toddlers	2001	245%	Located in LIIF affordable housing building	$882,000	$2,165,168	2,775	14	198	$780	$154,655	$18,000
4	LIIF Case Study Improvements in existing shell - in affordable housing	Center - Preschool	2007	194%	Located in LIIF affordable housing building Urban	$763,280	$1,482,285	3,730	47	79	$397	$31,538	$54,000
Average Commercial Renovations						**$1,226,074**	**$1,956,486**	**$3,253**	**47**	**139**	**$589**	**$93,096**	**$36,000**

Note: Does not include building landscaping or design costs; this can typically cost 10% of outdoor space budget. Inflation Rates are from

https://www.dgs.ca.gov/RESD/Resources/Page-Content/Real-Estate-Services-Division-Resources-List-Folder/DGS-California-Construction-Cost-Index-CCCI

(1) TI costs are included in total project costs per sqft but not available for all projects.
(2) Includes 3 new preschool classroom buildings, 2 renovated toddler classroom buildings, 1 renovated infant classroom building and 1 renovated admin/teacher lounge.
Sources: Katheryn Tama; Brion Economics, Inc.

Table C-2
Detailed Sample Child Care Renovation Project Cost Estimates
ECE Economic Benefit Study - Tulare County 2024

No.	Type	Program	Year	Sqft of Outdoor Space	2023 Adj. Outdoor Space Budget	Total Cost of Sqft of Outdoor Space	Total Cost per Child of Outdoor Space	Total Center & Outdoors Costs	Overall, Total Cost Per Child
Residential Renovation Projects									
1	Remodel Residential	Center - Preschool	2014	NA	$79,720	NA	$2,161	$994,565	$41,440
Commercial Renovation Projects									
2	Build Up San Mateo Co. Renovation/Expansion (2)	Center - Preschool and Infants/Toddlers	2022	NA	NA	NA	NA	$2,222,007	$27,432
3	LIIF Case Study Improvements in existing shell - in affordable housing	Center - Infants/Toddlers	2001	1,800	$62,187	$35	$4,442	$2,227,355	$159,097
4	LIIF Case Study Improvements in existing shell - in affordable housing	Center - Preschool	2007	4,030	$158,868	$39	$3,380	$1,641,152	$34,918
Average Commercial Renovations				**2,915**	**$110,527**	**$37**	**$3,911**	**$2,030,171**	**$73,816**

Note: Does not include building landscaping or design costs; this can typically cost 10% of outdoor space budget. Inflation Rates are from

https://www.dgs.ca.gov/RESD/Resources/Page-Content/Real-Estate-Services-Division-Resources-List-Folder/DGS-California-Construction-Cost-Index-CCCI

(1) TI costs are included in total project costs per sqft but not available for all projects.
(2) Includes 3 new preschool classroom buildings, 2 renovated toddler classroom buildings, 1 renovated infant classroom building and 1 renovated admin/teacher lounge.
Sources: Katheryn Tama; Brion Economics, Inc.

Table C-3
Detailed Sample Child Care Portable/Modular Cost Estimates
Project Cost Estimates
ECE Economic Benefit Study - Tulare County 2024

No.	Type	Type of Project	Year	2023 Inflation %	Construction Type	Facility Budget including FF&E	2023 Adj. Budget	Total Sqft of Bldg. Space	# of Children or Spaces	Sqft of Bldg. Space per Child	Total Cost per Bldg. Sqft	Total Cost per Child Care Space	Additional Outdoor Space Budget	2023 Adj. Outdoor Space Budget
1	Portables	Center preschool located school on district property	2009	180%	New Portable / Modular	$926,177	$1,668,505	3,696	50	74	$451	$33,370	$30,000	$54,045
2	Portables	Center preschool located school on district property	2009	180%	New Portable / Modular	$1,076,132	$1,938,648	3,696	50	74	$525	$38,773	$83,868	$151,088
3	Portables	Center preschool located school on district property	2012	165%	New Portable / Modular	$518,497	$857,555	1,920	20	96	$447	$42,878	$28,800	$47,633
Average						**$840,269**	**$1,488,236**	**3,104**	**40**	**81**	**$474**	**$38,340**	**$47,556**	**84,255**

Note: Does not include building landscaping or design costs; this can typically cost 10% of outdoor space budget. Inflation Rates are from https://www.dgs.ca.gov/RESD/Resources/Page-Content/Real-Estate-Services-Division-Resources-List-Folder/DGS-California-Construction-Cost-Index-CCCI

(1) TI costs are included in total project costs per sqft but not available for all projects.

(2) Permit costs are include in total project costs.

Sources: Katheryn Tama; Brion Economics, Inc.

Table C-3
Detailed Sample Child Care Portable/Modular Cost Estimates
Project Cost Estimates
ECE Economic Benefit Study - Tulare County 2024

No.	Type	Type of Project	Year	Sqft of Outdoor Space	Cost of Sqft of Outdoor Space	Total Cost per Child of Outdoor Space	Total Center & Outdoors Costs	Overall, Total Cost Per Child
1	Portables	Center preschool located school on district property	2009	3,750	$14.41	$1,081	$1,722,550	$34,451
2	Portables	Center preschool located school on district property	2009	3,750	$40.29	$3,022	$2,089,736	$41,795
3	Portables	Center preschool located school on district property	2012	1,875	$25.40	$2,382	$905,188	$45,259
Average				**3,125**	**$27**	**$2,161**	**$1,572,491**	**$40,502**

Note: Does not include building landscaping or design costs; this can typically cost 10% of outdoor space budget. Inflation Rates are from https://www.dgs.ca.gov/RESD/Resources/Page-Content/Real-Estate-Services-Division-Resources-List-Folder/DGS-California-Construction-Cost-Index-CCCI

(1) TI costs are included in total project costs per sqft but not available for all projects.

(2) Permit costs are include in total project costs.

Sources: Katheryn Tama; Brion Economics, Inc.

Table C-4
Detailed Sample Family Child Care Home Project Cost Estimates
ECE Economic Benefit Study - Tulare County 2024

No.	Type	Program	Year	Construction Type	Start Up / Fees Cost Estimate	2023 Adj. Budget	# of Children or Spaces	Type of FCCH	Overall, Total Cost Per Child
1	FCCH Grant	State DSS Minor Repair & Renovation Grant Program - SMC (1)	2023	11 FCCHs awarded a total of $165,000	$15,000	$15,000	12	small and large	$1,250
2	FCCH Start Up Costs	Monterey Co.	2023	New Small FCCH	$12,000	$12,000	8	small	$1,500
3	FCCH Start Up Costs	Santa Barbara Co.	2023	New Small FCCH	$3,500	$3,500	8	small	$438
5	FCCH Grant	Build Up San Mateo - FCCH Grant Program (2)	2022	Renovation/Expansion Grant Program (91 Grants)	$10,000	$10,852	8	small and large	$1,360
4	FCCH Grant	Build Up San Mateo - Gilead Grant - 10 FCCHs (3)	2021	Renovation/Expansion Grant Program (10 Grants)	$5,000	$5,832	8	small	$729
6	FCCH Start Up Costs	Children's Council San Francisco - Start Up Expenses	2015	New Small FCCH	$3,913	$5,108	8	small	$639
7	FCCH Start Up Costs	Children's Council San Francisco - Start Up Expenses	2015	New Large FCCH	$4,910	$6,410	12	large	$534
Average FCCH Costs					**$7,760**	**$8,386**	**9**		**$921**

Note: Does not include building landscaping or design costs; this can typically cost 10% of outdoor space budget. Inflation Rates are from https://www.dgs.ca.gov/RESD/Resources/Page-Content/Real-Estate-Services-Division-Resources-List-Folder/DGS-California-Construction-Cost-Index-CCCI

(1) Based on average award for San Mateo County for FCCHs - 11 homes and total of $165,000, per Kristen Anderson; includes outdoor improvements.

(2) Build Up San Mateo FCCH Grant Program, funded by local ARPA Funds by the County Board of Supervisors.

(3) See https://buildupsmc.com/projects-page/opportunities/fcc-grants-2020/ This program created 22 new FCCH spaces.

Sources: Eileen Monahan; Kristen Anderson, PhD; Build Up San Mateo; Children's Council of San Francisco; Brion Economics, Inc.

Appendix D: Changes Since the 2010 Study

This appendix compares the findings, results, and conditions from the 2010 Study *Economic Impact of Child Care Tulare County*[1] to this new study prepared in 2024 for Tulare County. Key data points are compared as well as the results of the Input/Output analysis.[2]

Changes in Demographics and ECE Supply

This section summarizes key data and conditions relating to children, population, and other demographic and economic data in terms of how they have changed since 2010.

- **Number of Children**: In 2010, there was an estimated 104,485 children, 0 to 12 years old.[3] As of 2023, the number of children has declined by 6.8% or by 7,109 children (see **Table II-2** for 2023 data).

- **Total Population:** The County's total population in 2010 equaled 447,814 and has increased by 9.1%, or 40,934, as of 2023.

- **Children to Population Ratio:** Children as a percent of the total population was 23.3% and has declined to 19.9% as of 2023. This decline mirrors statewide declines.

- **ECE Providers**: In 2010, there were a total of 565 ECE providers, including 416 FCCHs and 149 ECE centers. As shown below, there has been little change overall in the number of providers or a net increase of three. However, there has been a loss of 48 ECE centers since 2010 and an increase of 51 FCCHs, or a 32.2% loss of centers and a 12.3% increase in FCCHs since 2010.

- **ECE Spaces**: In 2010, there was a supply of 14,020 ECE spaces. In 2024, a total of 10,721 spaces are associated with FCCHs and centers, which equals a loss of 3,299 ECE spaces or a reduction of 24%. This parallels the shift in the type of provider, as FCCHs serve fewer children than centers.[4]

[1] Tulare County Child Care Planning Council (2010): Economic Impact of Child Care Tulare County. 2010. Prepared by McLaughlin & Associates and Applied Economics.
[2] Economic data from 2010 in terms of dollars have been adjusted to 2024 dollars to compare real change using the Bureau of Labor Statistics "Consumer Price Index".
[3] Data from the California Department of Finance, P-2B Projections data. The 2010 Economic Study does not list the number of children specifically.
[4] The 2010 study does not mention licensed exempt care and TK did not exist in 2010, so these two segments of supply are not included in this comparison.

Type of Provider	2010	2024	Net Change	% Change
Family Child Care Homes	416	467	51	12.3%
Child Care Centers	149	101	(48)	-32.2%
Totals	**565**	**568**	**3**	**0.5%**

Note: Excludes TK, License-Exempt Providers, and FFNs.

- **Labor Force Participation Rates**: In 2010, the LFPRs in Tulare County were higher than current figures. In 2010, the LFPRs were 60.1% for working parents with children under 6 and 68.4% for children 6 to 17 years old. The 2010 County rate was similar to the California rate for children under 6 (61%) but slightly higher than the California rate for children 6 to 17 years old (66.8%). The current rates of 56.8% for children under 6 and 67.4% for children 6 to 17 years old may reflect the continued effects of the COVID-19 pandemic, the lack of ECE spaces and providers or centers, and the affordability of ECE for many families.

- **Unemployment Rates**: In March 2010, when the economy was still experiencing the impacts of the Great Recession, unemployment rates in the County were 19.3% compared to 13% in California. In December 2023, the County's unemployment rate was 11.2% compared to 5.1% statewide, or 220% higher than the California unemployment rate (see **Table III-6**).

- **Household Size**: The County's average household size has decreased since 2010. In 2010, the average household size in Tulare County was 3.41 while, for California as a whole, it was 2.99 or 14% higher for Tulare County. As of 2023, the average household size in Tulare County was 3.22, while the State's average household size was 2.77.

- **Poverty Levels**: The 2010 report notes that one in 3 children live in poverty in Tulare County. As of 2022, 29% of families with children under 17 are below the federal poverty level (see **Table II-6**). For single-female households, that figure is 52% or over half. In contrast, the figure is 21.5% for married households. The need for affordable and subsidized ECE for single female households is great and can make a difference in whether they can work.

Economic Benefits – 2010 Compared to 2024

This section summarizes the key economic impact results of the Input/Output analysis and how they have changed since 2010. **Table D-1** summarizes the results of both analyses and their key findings.

- **ECE Employment:** Since 2010, there has been a 46% increase in the number of direct jobs associated with the direct provision of ECE services to children. In 2010, there were 2,100 ECE jobs, and that figure has increased to 3,068 jobs as of 2024. Equally, there has been an increase in the indirect and induced jobs associated with the ECE industry since 2010.

- **Direct Labor Income**: In 2010, there was a total of about $73.2 million (in 2024 dollars) in direct wages and salaries and other labor income associated with the ECE industry. In 2024, that figure is $118.9 million, or a 62% increase over 2010 figures. This is encouraging news, although, as discussed elsewhere, ECE workers earn relatively low wages.

- **Total Output**: Since 2010, there has been a decline in total output of $24.4 million in real or constant 2024 dollars or a slight decline of 8%. Total output in 2010 dollars was $212 million, or $70 million less than the current direct economic activity associated with the industry.

- **State and Federal Funding**: The ECE industry currently brings in $250 million per year from State and federal agencies. In 2010, that figure was $87.2 million. This represents a 300% increase over 2010 conditions. These dollars generate significant additional benefits as they ripple through the economy such as wages, salaries, and indirect spending by the industry.

- **Multiplier Change**: The economic multipliers shown in the last column of **Table D-1** are relatively the same as in 2010. These factors express the increased indirect and induced activity in jobs, labor income, and total output.

The comparison of the ECE industry to other County sectors in 2010 has some similarities. Nut tree farming continues to have the same size total output as the ECE industry. While fruit and vegetable canning was a similarly sized sector in 2010, the ECE industry is now four times larger in terms of direct spending.[5]

[5] Note: The 2010 study does not provide all of the IMPLAN results and data, so a complete comparison is not possible.

Table D-1
Comparison of 2010 Economic Multiplier Effects to 2024 Analysis
ECE Economic Benefit Study – Tulare County 2024

Type of Benefit/Impact	Direct Effect	Indirect and Induced Effects	Total Effects	Multiplier
2010 Economic Analysis (1)				
Employment	2,101	251	2,352	**1.12**
Percent Distribution	89.3%	10.7%	100.0%	
Labor Income	$73,225,000	$28,855,000	$102,080,000	**1.39**
Percent Distribution	71.7%	28.3%	100.0%	
Output	$306,675,000	$126,440,000	$433,115,000	**1.41**
Percent Distribution	70.8%	29.2%	100.0%	
2024 Economic Analysis (2)				
Employment	3,068	526	3,594	**1.17**
Percent Distribution	85.4%	14.6%	100%	
Labor Income	$118,951,000	$23,436,000	$142,387,000	**1.20**
Percent Distribution	83.5%	16.5%	100.0%	
Output	$282,190,000	$87,384,000	$369,574,000	**1.31**
Percent Distribution	76.4%	23.6%	100.0%	
Change 2010 to 2024				
Employment	967	275	1,242	**0.05**
Percent Change	46.0%	109.6%	52.8%	4.5%
Labor Income	$45,726,000	($5,419,000)	$40,307,000	**-0.19**
Percent Change	62.4%	-18.8%	39.5%	
Output	($24,485,000)	($39,056,000)	($63,541,000)	**-0.10**
Percent Change	-8.0%	-30.9%	-14.7%	

(1) Data from the 2010 Study has been adjusted to 2024 dollars using the Bureau of Labor Statistics Consumer Price Index.
https://data.bls.gov/cgi-bin/cpicalc.pl?cost1=1&year1=201001&year2=202404
Data from "Economic Impact of Child Care in Tulare County-2010" prepared for the Tulare County Child Care Planning Council by FJ McLaughlin & Associates and Applied Economics, 2010.

(2) See Table IV-7 of Chapter IV.

Source: IMPLAN Cloud; Tulare County Office of Education; Brion Economics, Inc.; Economic & Planning Systems, Inc.

The ECE industry has grown in terms of the number of jobs associated with it overall. The economic impact, as calculated in this kind of input/output analysis, is somewhat less than it was in 2010 when calculated in real dollars, even though it is bringing in more State and federal funding to the County. **Exhibit D-1** graphically summarizes the changes in direct ECE jobs associated with the 2010 study compared to this 2024 study.

Exhibit D-2 graphically summarizes the change in total direct output (or spending) and total labor income between the 2010 and 2024 study.

Exhibit D-1

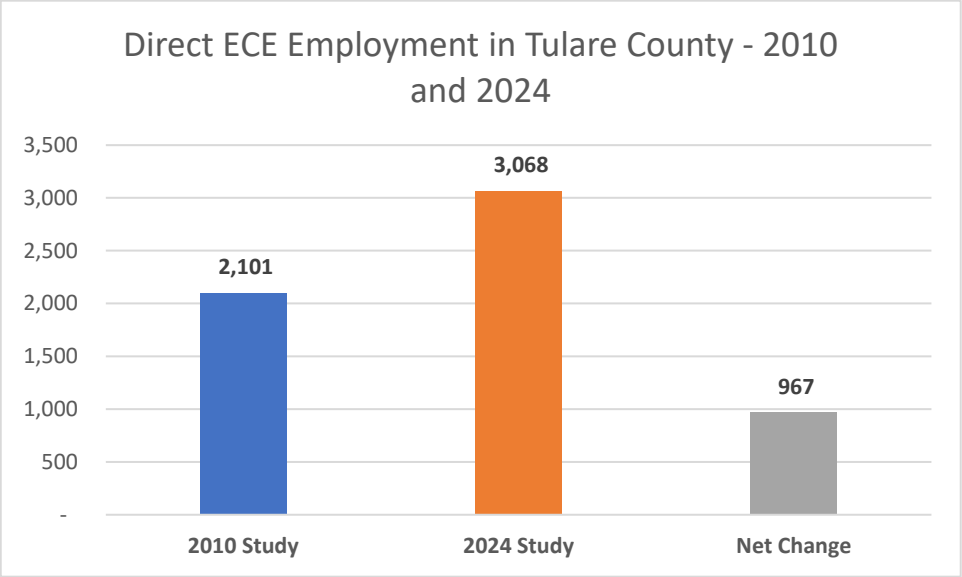


Exhibit D-2

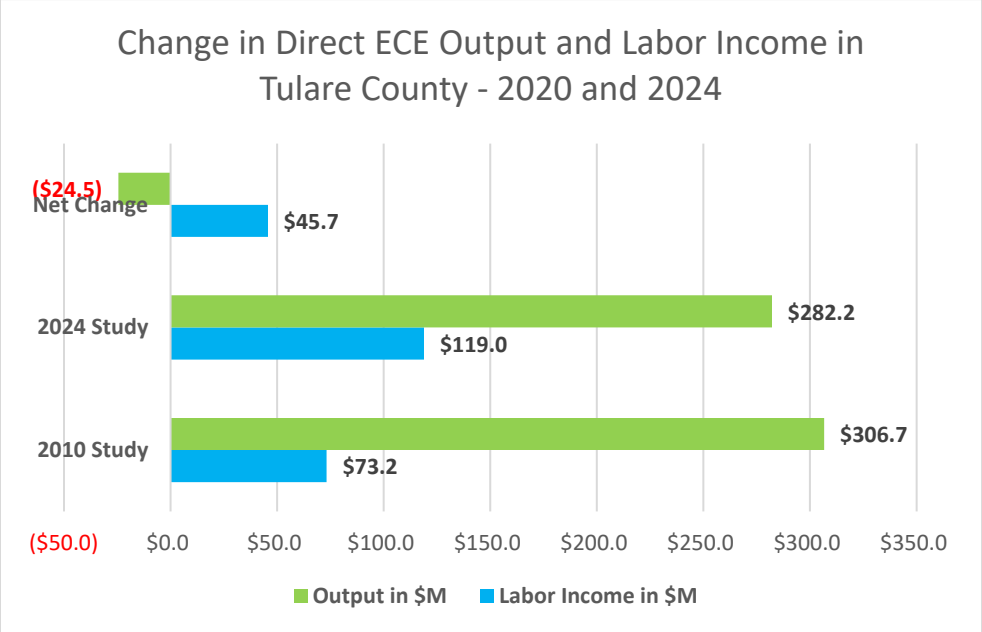


Exhibit D-3 graphically summarizes the total employment benefits associated with the ECE Industry in Tulare County in 2010 compared to 2024, including direct, indirect, and induced jobs.

Exhibit D-3

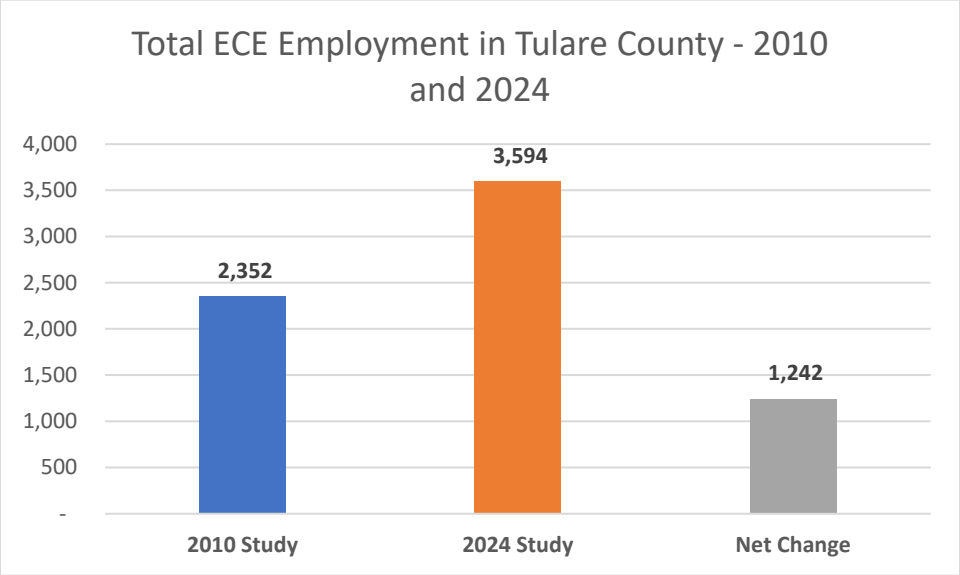
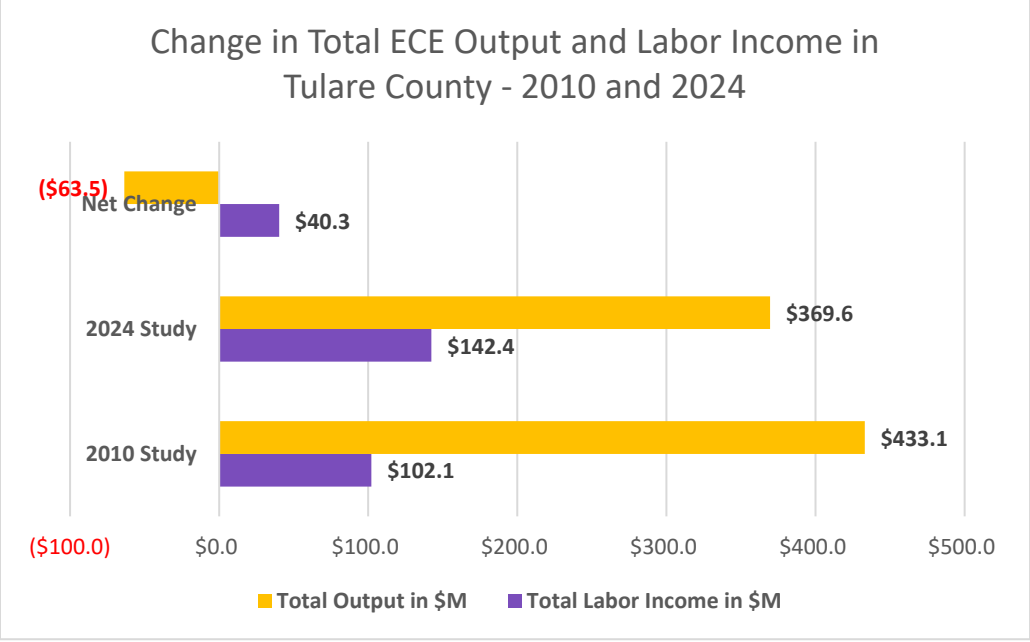


Exhibit D-4 graphically summarizes the total labor income and total output benefits associated with the ECE Industry in Tulare County in 2010 compared to 2024, including direct, indirect, and induced jobs.

Exhibit D-4



The 2010 Economic Study had a great set of recommendations, and these are shown in **Exhibit D-5** along with an evaluation of whether they were implemented and whether they are still valid.

Exhibit D-5

2010 Study Recommendations and Evaluation

Focus: Awareness/Affordability/Accessibility

Develop a communications plan to disseminate the findings of this report to stakeholders --chambers of commerce, business leagues/associations, state and local government officials, the media, workforce development agencies and councils, funding agencies, parent groups, and ECE advocacy organizations.			
2010	Create a public education campaign for businesses about the "business case" for child care and the critical role child care plays in the productivity and competitiveness of Tulare County's industrial base.	2024	Recommended, add Social Media
2010	Create a speakers' bureau to present the economic benefits of child care to various business and community groups to build public support for greater investment.	2024	Summit Planned for October 2024; change bureau to series
2010	Encourage families to advocate for early childhood investment and increased quality and service availability.	2024	Recommended
2010	Invite leaders in the private sector to be speakers and/or audience participants at briefings about these findings and distribute information about the economic impact of the child care industry in Tulare County.	2024	Covered Above
Advocate for child care at a local level, so that local officials can pursue increased public investment to expand and improve licensed child care service options for low-income families and create a plan for adding/expanding licensed child care facilities in these communities.			
2010	Encourage Tulare County and cities to include child care planning in their General Plans and to consider adopting strategies and incentives to promote this development.	2024	Recommended

2010	Incentivize developers to include child care (facilities or funding) in their projects (residential, commercial, and industrial.) Incentives could include fee reductions/deferrals and fast-tracking of projects.	2024	Recommended
2010	Connect new child care service options to existing transit corridors, so that parents can easily access child care using existing transit services.	2024	Build new ECE Facilities near Transit Facilities
2010	Ensure that there is specific language that encourages and facilitates the development of child care services in the general plans of the county and each city.	2024	Covered Above
2010	Expand the availability of licensed child care during non-traditional hours.	2024	Recommended
Encourage local businesses, and industry and business associations (e.g., chambers of commerce) to include child care planning in their strategic planning.			
2010	Promote on-site care facilities, child care subsidies and supports, backup child care, flexible spending accounts, and other benefits appropriate to the workplace.	2024	Recommended, add employee sponsored ECE, on or off-site
2010	Establish leave policies and employment practices that do not exacerbate the need for scarce child care services (e.g., permit the use of paid sick leave to care for a sick child).	2024	Encourage longer maternity leave; adopt more supportive Family Leave Policies
2010	Encourage small employers to join group Flexible Spending Accounts, which reduces costs by providing an economy of scale, and promote the use of these accounts by parents who pay for child care.	2024	Recommended, add educate employees with children to use FSAs
2010	Hold a seminar for real estate agents about the requirements for child care facilities to increase their knowledge and skill in assisting individuals and groups seeking space in which to create licensed facilities.	2024	Recommended, add develop fact sheet on facility needs and specs