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PREPARED: January 5, 2012

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## **ECONOMIC DEVELOPMENT COMMITTEE**

A Committee of the Chico City Council: Councilmembers Flynn (Chair), Schwab and Sorensen

### **AGENDA**

**Meeting of Thursday, January 12, 2012 - 4:00 p.m.  
Council Chamber Building - Conference Room No. 1  
421 Main Street**

NOTE: Items Not Appearing on Posted Agenda: This Agenda was posted on the Council Chamber Building Bulletin Board at least 72 hours in advance of this meeting. In order for the Committee to take action on an item not appearing on the posted agenda, other than merely acknowledging receipt of correspondence or other information, the Committee must make one of the following determinations:

1. Determine by a two-thirds vote or by a unanimous vote if less than two-thirds of the Committee is present, that the need to take action arose subsequent to the Agenda being posted.
2. Determine that the item appeared on a posted Agenda for a meeting occurring not more than 5 calendar days prior to this meeting, and the item was continued to this meeting.

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### **1. REGULAR AGENDA**

- 1.1. **Update on the Chico Innovation Scorecard** - In early 2011, Grow-California created an assessment tool for local leaders seeking an innovation-driven economic development solution: *The Innovation Scorecard*. The Scorecard measures a community's readiness to support innovative growth companies and then provides a framework to enhance local innovation readiness. Jon Gregory (Golden Capital Network) and Bob Linscheid (CEPCO) will provide the Committee with information on the Innovation Scorecard concept and a recap of their recent award ceremony showcasing local innovative companies. (*Attachment*)
- 1.2. **Presentations on Outcomes from 2011-12 Contracted Economic Development Services/Events** - Individuals and organizations with 2011-12 City contracts for Economic Development/Tourism services and events will have the opportunity to present mid-year progress reports (approximately 5 minutes per RFP including questions) on the outcomes achieved to date. *Recipients should RSVP to Nancy Kelly [nkelly@ci.chico.ca.us](mailto:nkelly@ci.chico.ca.us) if they plan on presenting their outcomes at this meeting or at the meeting of February 9, 2012.*
- 1.3. **Update on Economic Development Action Plan** - Senior Planner, Shawn Tillman, will provide a status report on the development of an action plan that will identify specific actions and initiatives to be taken in the coming year that advance the City's Economic Development Strategy.
- 1.4. **Update on 2012-13 Contracting Process for Economic Development/Tourism Services and Events** - City Manager Dave Burkland will provide an update on the 2012-13 contracting process for economic development/tourism services and events.

2. **REPORTS AND COMMUNICATIONS**
3. **BUSINESS FROM THE FLOOR**
4. **FUTURE MEETINGS:** The next Economic Development Committee meeting will be held on Thursday, February 9, 2012 in Conference Room 1 at 4:00 p.m., unless otherwise noted.

**Distribution:**

**Agenda with Attachments:**

**Committee Members:**

Councilmember Mary Flynn, Chair  
Mayor Ann Schwab  
Councilmember Mark Sorensen

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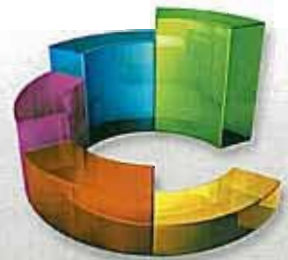
Presented by

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# 2011 INNOVATION SCORECARD CHICO, CA

**GROW**California



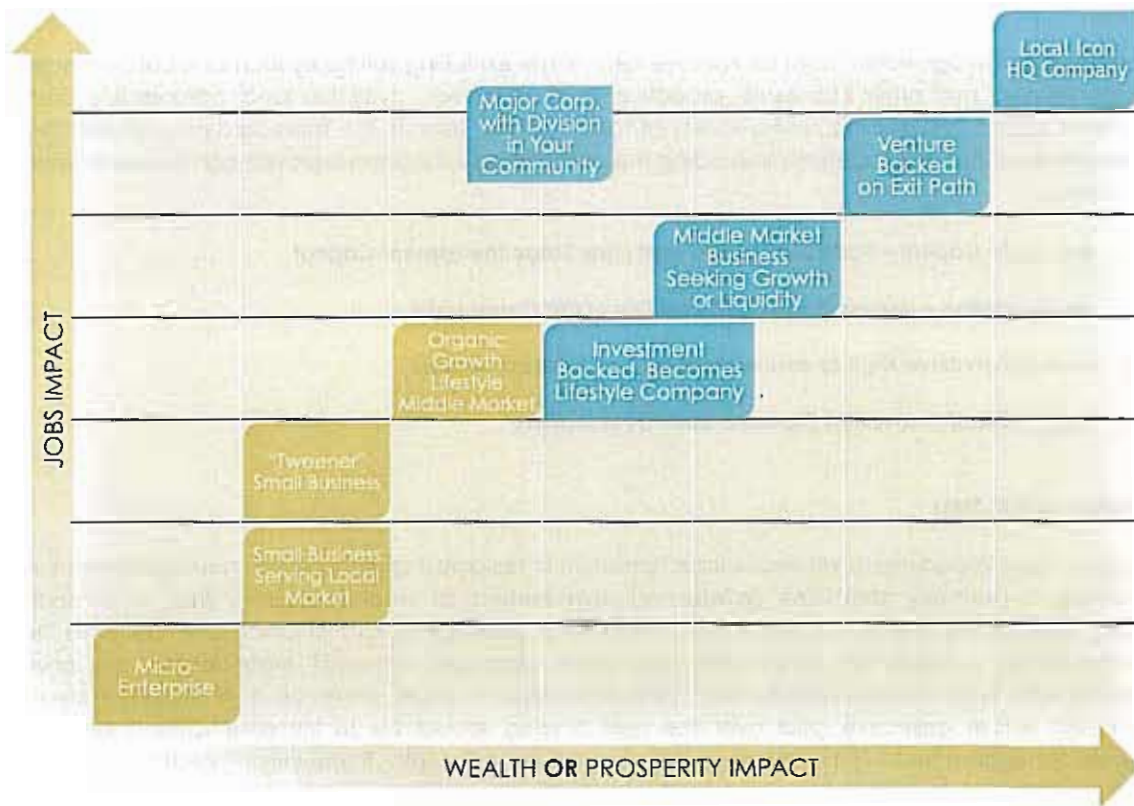
## Executive Summary

Discussion among government officials, university leaders and business executives about innovation as an economic development strategy has mostly been relegated to the 50,000-foot-level rather than given merit as a practical solution that can be implemented to create jobs at the grass-roots level in Chico. Moreover, much of the public discourse has occurred without a clear understanding on how to most effectively support innovators.

Before embarking on job creation programs focused on innovative growth companies, it is important for all local stakeholders to recognize the key impediments that exist in Chico that affect their ability to grow.

In early 2011 Grow-California created an assessment tool for local leaders seeking an innovation-driven economic development solution: **The Innovation Scorecard**. The Scorecard measures a community's readiness to support innovative growth companies (regardless of their size), and then provides a framework to enhance local innovation readiness. It was also developed to assist local leaders in identifying their high-growth (and high-growth-potential) innovative companies.

The premise for the Innovation Scorecard is based on a concept Grow-California has created called the **Local Business Taxonomy**, pictured at the top of the next page. Using the vertical axis for jobs impact, and the horizontal axis for wealth or prosperity impact, the Taxonomy identifies the many different types of businesses that exist in a community, and illustrates that certain businesses have a much higher propensity to create jobs and wealth. For example, a microenterprise, denoted on the bottom left of the graphic, has a much smaller impact than a local icon headquarters company, as depicted on the far upper right. Innovation-oriented business categories are those presented on the right half of the graphic. To the extent a community is able to identify its innovative growth companies -- and then systematically bring resources from both inside and outside the community to help these businesses grow -- it will stand a better chance of enhancing prosperity, generating wealth, and growing quality jobs.



Recognizing the vital importance of innovative growth companies to the local economy, in the Spring of 2011 the Chico Economic Planning Corporation (CEPCO) and the Chico Chamber of Commerce agreed to participate with Grow-California in making Chico one of its two pilot Innovation Scorecard projects. Grow-California's goal in developing Chico's 2011 Innovation Scorecard was to present a real-world assessment of the local innovation sector with input provided by true, cutting-edge innovators; identify 3 to 5 key impediments inhibiting the growth of local innovative companies; and deliver an actionable agenda that, over time, can be systematically implemented (and also measured) to improve the likelihood of innovative company success.

The Innovation Scorecard established a baseline score for the community, and a process through which Chico can reduce or remove altogether its impediments to innovation using a **4-Level Innovation Maturity Model** drawn from other disciplines and applied to economic development. Over time, a community striving to advance innovation should endeavor to obtain all of the attributes associated with Level 4 in the Innovation Maturity Model. At this level of maturity, the capacity to support innovation-oriented economic development is maximized, and recurring entrepreneurial success stories – including positive liquidity events – are evident.

2011 Chico Innovation Readiness Score: 56

2015 Goal: 75

### **What It Means**

The community has significant room for improvement. While exhibiting attributes such as local connectivity to peers, services and other businesses; proactive local advocacy; available land; comparable cost of doing business and cost of living; and a variety of "quality of life" factors, the Scorecard process identified 4 key impediments that are negatively impacting the ability of local innovative growth companies to flourish. These include:

- 1. Access to Capital – Particularly Seed and Early Stage Investment Capital**
- 2. Transportation – Ingress/Egress Into and Out of the Community**
- 3. Lack of Pervasive High Speed Internet for Key Business Sectors**
- 4. Lack of Local Innovation Expertise and "Deal Makers"**

### **Immediate Action Step**

Addressing these impediments will necessitate formation or repurposing local or regional organizations with a mandate to positively affect the growth and development of local, innovative firms. A consortium including CEPCO, the Innovation Lab, Chico Chamber of Commerce, City of Chico and California State University, Chico – along with other interested public agencies, nonprofit organizations and private businesses who wish to be involved and can add value – could serve as a "Permanent Steering Committee" whose collective goal over the next 5 years should be to increase Chico's Innovation Readiness Score from 56 to 75 by directly addressing the impediments. Some initial thoughts on solutions, though viewed as only a beginning point for discussion purposes, has been presented as a section of this Innovation Scorecard report.

## Background

Innovation remains the one true economic advantage America possesses over other nations. Many important studies conclude that innovation is largely driven by entrepreneurial growth companies. These companies come in many different forms. Grow-California has coined six terms to categorize the range of innovative companies in Chico, including:

- Start Up Sensations
- Hidden Gems
- Mid Market Marvels
- Emerging Market Leaders
- Local Innovation Icons
- Global Giants

### The Positive Economic Impact of Innovative Growth Companies

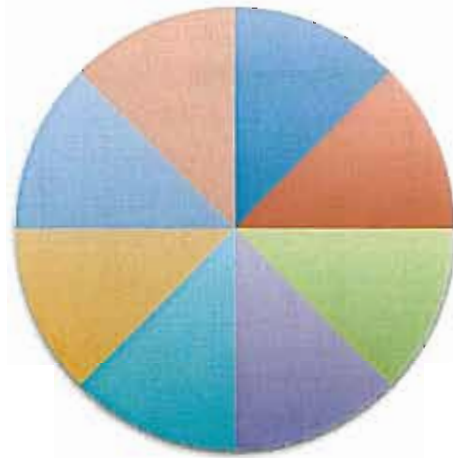
What is common among these businesses is that they are scalable, selling highly-differentiated products or services into national, and sometimes, global markets. Through this process new dollars are brought into Chico. When local innovative growth companies achieve their business milestones, they grow and create jobs - and generate new tax revenue. Moreover, they often serve as springboard companies that foster new local industry clusters. Simply put, when they succeed, metaphorically, our "economic pie" grows. As depicted below, not only does the size of the pie get bigger, but so do the individual slices.

In today's dynamic global economy, Chico needs ways to increase its economic pie by being better able to support these companies.

### Positive Economic Impact of Innovative Growth Companies Selling to National and Global Markets



Chico's "Economic Pie"

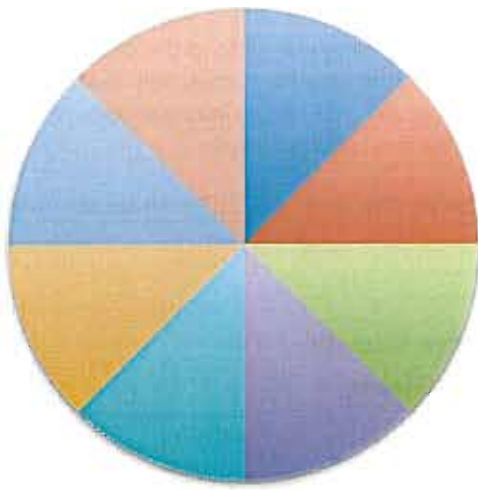


Chico's "Economic Pie" when Local Innovative Companies sell Products into National and Global Markets

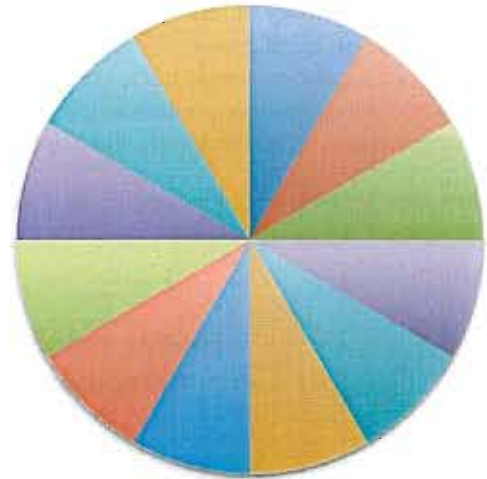
### The Minimal Economic Impact of Competing Businesses Selling to the Same Local Market

It is important to differentiate this small subset of businesses (generally 1-2% of the business community) that sell innovative, highly-differentiated products nationally and globally from the other 98-99% that sell almost exclusively into the local economy. The success of one business selling into the local community often comes at the loss of another local business. Using the economic pie metaphor, the process of local, national and global businesses selling into the local economy either carves up the economic pie into more slices, or redistributes the size of the individual slices. It rarely grows the size of the pie thereby failing to generate any meaningful economic gain. This "shifting" versus "growing" of the economic pie is illustrated below

#### Illustration of Minimal Economic Impact of Competing Local, National, and Global Firms Selling to the Same Local Market



Chico's "Economic Pie"



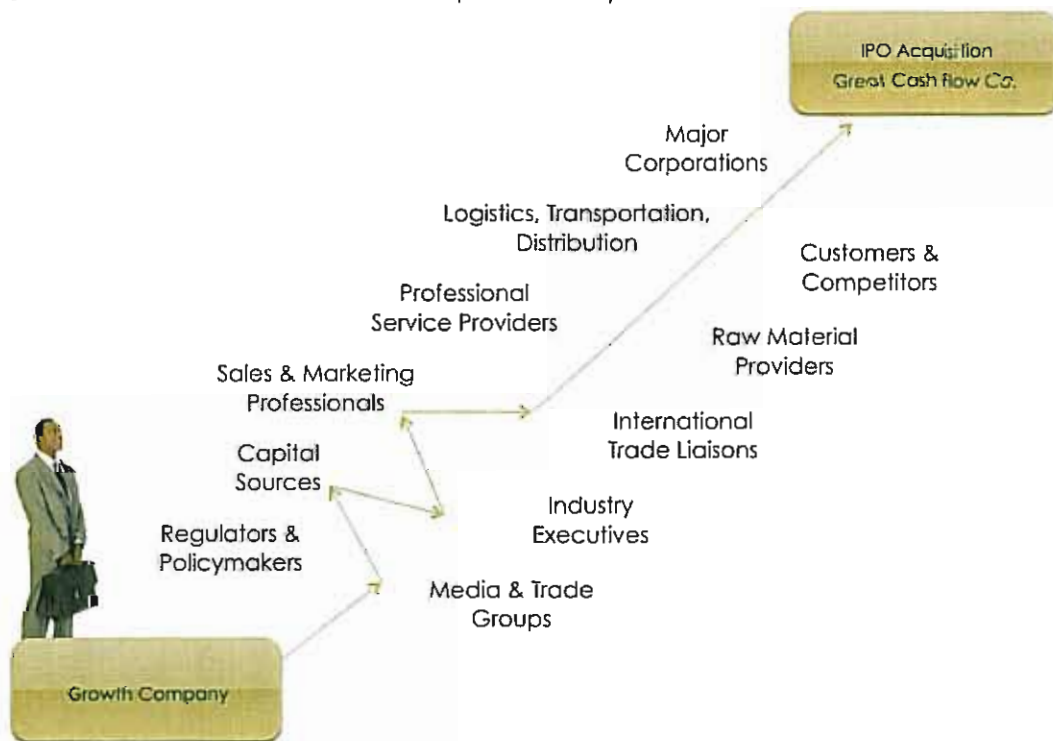
Chico's Economic Pie when Businesses Compete for the Same Local Market

## Innovation Value Chain

Every innovation oriented industry has its own unique **Innovation Value Chain**. Within this chain exist a number of contributors and influencers, including:

- Regulators and policymakers
- Media and trade groups
- Thought leaders
- Capital sources (debt, equity and grant)
- Industry executives
- Sales and Marketing professionals
- Universities and federal labs
- International trade liaisons
- M&A firms and business brokers
- Investment bankers
- Professional services providers (accounting, legal, valuation, advertising, etc.)
- Raw materials providers, suppliers and vendors
- Logistics, transportation and distribution organizations
- Strategic business development partners and acquirers
- Customers and competitors
- Start-ups, early-stage, mid-stage and late-stage companies
- Market leaders and global giants

Lack of access to the proper value chain element, can severely restrict, and even kill, a growth business. Accessing the most effective value chain element can dramatically enhance the potential for growth. Successfully navigating the maze of value chain influencers requires key decisions by the company's management team through an ongoing series of "pivot points" during the life of the business. Impediments to a community's innovation readiness often can be found in its inability to directly or indirectly impact elements of the value chain to the benefit of the local innovator. To the extent a community is successful in addressing impediments found in the value chain – and is able to help navigate its innovators through the value chain maze - it is undertaking what Grow-California refers to as "**pivot point economic development**" (see illustration of Pivot Point Economic Development below).



## Process

In the Spring of 2011 CEPCO and the Chico Chamber of Commerce joined efforts to participate in one of Grow-California's initial two Innovation Scorecard pilot projects. Grow-California's Scorecard efforts in Chico involved a methodology that incorporates the multiple contributors and/or influencers into a discovery and analytical process to assess the state of local innovation readiness.

The key activity of the Scorecard process was **the Innovation Board Room**. The purpose of the Board Room was two-fold: (1) to develop a shared understanding among a community's jobs and wealth creation stakeholders about the innovation value chain and the impediments which can inhibit innovation; and (2) to identify local innovative firms which would benefit from increased support from the local community.

Grow-California executives facilitated a 2-hour planning session to capture data on the importance and local capacity of 60 contributors or influencers on innovative growth companies. A second session was held to gather additional data to affirm or refute preliminary conclusions drawn from the first Board Room session.

Key to the effectiveness of the Innovation Boardroom was participation by over 30 stakeholders representing the local business community. The group included a mix of entrepreneurs, CEOs, government leaders, specialized professional service providers, and investors, among others. The Innovation Board Room sessions were held on May 26, 2011 and August 5, 2011. Participants were:

Mike Donnelly	Dori Gladney	Jill Ortega
Rebekah Funes	Bill Brouhard	David Hanson
Dave Burkland	Steve Gonsalves	Chet Watson
Jim Umenhofer	Courtney Nelson	Jeff Schlicht
Larry Lane	Jolene Francis	Jim Morgan
Roger Hart	Daren Otten	Alice Patterson
Frank Marinello	Robert Strazzarino	Bill Peterson
Valerie Lee	Ryan Cheung	Derek Sine
Barry Sherwood	Erik Twist	Mike Ward
Christian Friedland	Bob Evans	
Steven Hoke	Joy Kimball	

Participants were provided ranking sheets from which they shared their perspectives on 60 factors, drawn from 11 major categories. These 11 categories have been determined by Grow-California to be important to innovative growth companies, and include:

Business Success	Facilities	Local Connectivity
Capital	Technical Resources	Transportation/Logistics
Global Connectivity	University/Higher Education	Sense of Place
Advocacy	Talent	

From the list of factors, input was requested in two ways. First, participants disclosed their perception of each factor in terms of its importance to innovative growth companies. Second, they provided their perception of local capacity as it related to the factor. Importantly, participants were required to select exactly 20 items each as either Very Important, Important, or Mildly Important/Not Important.

The data yielded the following "top 12" in terms of highest degree of importance.

### **Most Important**

Local Connectivity-Services/Talent  
University/Higher Ed-Talent in Region  
Skilled Technical Workforce  
High Speed Internet  
Capital Raising  
Capital – Seed/Angel

Liquidity Events  
Talent-Business Development and Sales  
Technical Resources-Intellectual Property  
Serial Entrepreneurs  
Airport  
Local Business Advocacy

Illustrating the often significant difference between importance and capacity, the 12 factors listed below were viewed as having the highest local capacity, but were not considered very important to the success of innovative growth companies.

### **Highest Local Capacity**

Outdoor Activities  
Recreation Opportunities  
Getting Around the Community  
Bike Travel  
Youth Sports  
Available Land

Cost of Living  
Bus Transportation  
Access to Child Care  
Local Connectivity  
Housing  
K-12 Education Quality

Conversely, the data yielded the following "bottom 12" in terms of importance.

### **Least Important**

Bus Transportation  
Bike Travel  
Conference Centers  
Diversity of Lifestyles  
Access to Child Care  
New Facilities

Cultural Events  
Global Connectivity: Media/Press  
Federal Advocacy  
Outside Versus Local Executives  
Flex Space  
Trade Associations

In terms of low local capacity, the following 12 factors were identified:

### **Lowest Local Capacity**

Airport  
M&A Advisory Services  
Venture-Backed Executives  
Industry Veterans  
Alternative Debt  
Spin-Offs  
Liquidity Event

International Trade Links  
Regulatory Agencies  
Federal Advocacy  
Logistics Providers  
Early-Stage Capital

Grow-California executives then performed a gap analysis based on the data collected from the ranking sheets. The ranking data was compared based on the perception of importance versus local capacity. The disparity of the gap – along with its level of perceived importance – is what determined the level of impediment, as follows.

1. **Extreme Impediments:** The most significant gaps (between factors deemed important for innovation and current capacity) are considered Extreme Impediments. This greater than 20% gap represents impediments that are deemed to be the most problematic and meriting the most attention during implementation.
2. **Impediments.** The second greater than 20% gaps are deemed problematic, yet less critical. They, too, merit (lesser) attention during implementation.
3. **Minor Impediments.** The third are deemed Minor and are believed to be manageable.
4. **Low Value.** So called, "Low Value" gaps reflect a minor gap between capacity and importance – that is, Chico ranks well with respect to its capacity for the factor...yet the factor is not deemed important to foster innovative firms.
5. **Extreme Low Value.** The most significant gaps between capacity and importance (i.e., significant capacity coupled with insignificant affect on innovation) are identified as Extremely Low Value.

After organizing all of the data into the various impediment categories, and reviewing the data with key local stakeholders, **4 Extreme Impediments** were identified. Because Grow-California executives believe it is essential for communities to maintain sustained focus on 3 to 5 highest-priority items (in this case addressing the Extreme Impediments) it has not included a detailed listing of the impediments that were not viewed as critical items.

## The 4 Major Impediments



"Our current airport services are inadequate to attract the captains of industry to come to Chico on a repeat basis. We need to improve in this area."

- Chris Friedland, Founder/CEO, Build.com

### 1. Access to Capital – Particularly Seed and Early Stage Investment Capital

Innovation-based growth companies (whether start-up or existing) need access to higher-risk, higher-reward investment capital, and other nontraditional sources of capital (such as SBIR grants). Until they become profitable (which can be a much longer cycle than other types of companies), they are not viable candidates for bank or other more risk-averse debt capital products. Unfortunately, readily identifiable, formal sources of seed and early-stage capital are hard, if not impossible, to find in the region. Though this is also a challenge for companies in urban areas, it is exacerbated in more remote locations like Chico/Butte County.

## **2. *Transportation – Ingress/Egress Into and Out of the Community***

Innovation-based growth businesses do business on a statewide, national and even global basis. Deals must be struck with vendors, suppliers, customers, strategic partners, investors, specialized service providers, advisors, etc. who are most often not located in Chico. Despite the proliferation of the Internet and other communications tools, executive-level deals of this nature almost always involve face-to-face meetings. It is extremely difficult, and not time-efficient, for "captains of industry" to get to Chico. Its also hugely inefficient (and often expensive) for local executives to travel to the destinations where they are having important meetings.

## **3. *High Speed Internet***

With its growing number of tech-based entrepreneurs, Chico has the potential to become a burgeoning technology center, focused around a cluster of software/IT, web, health care and laser technology companies. Key to achieving the full growth potential of many of these companies, and a burgeoning technology center, is access to ultra-high bandwidth and high-speed Internet. Such connectivity could provide Chico with a unique comparable advantage in attracting more technology companies and start-ups versus other small- to medium-sized communities that are not located on the "innovation grid". Though the University possesses ultra high speed Internet, much of the community does not.

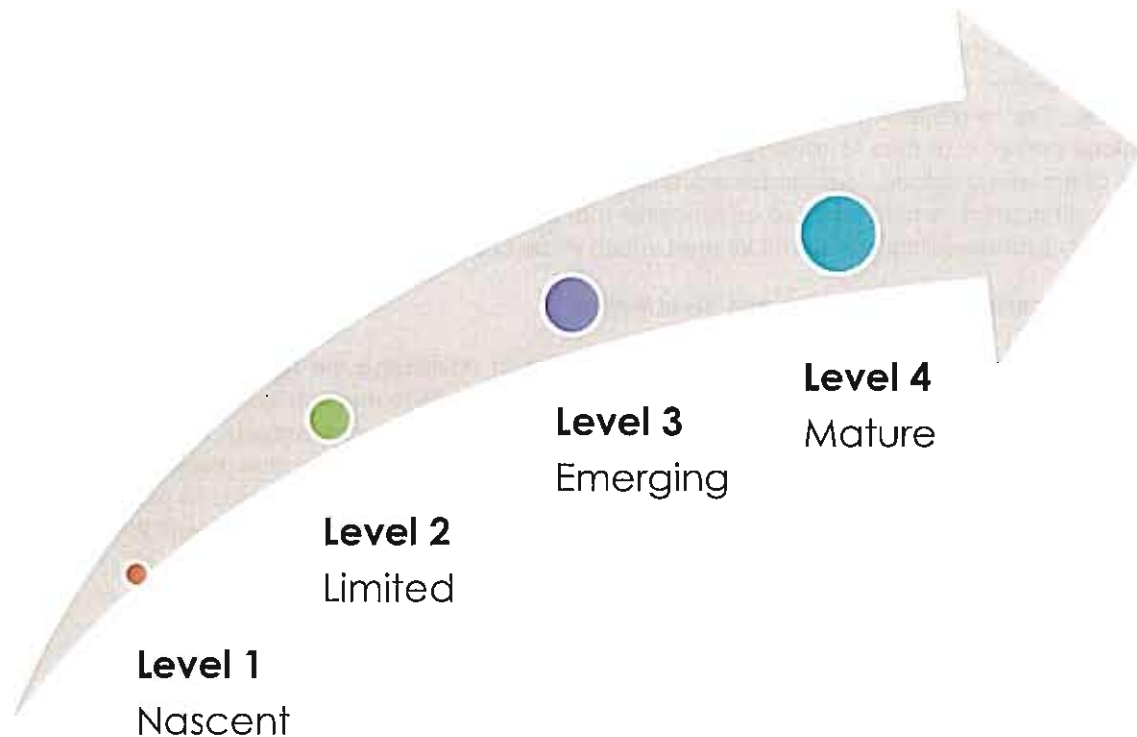
## **4. *Lack of Local Innovation Expertise and "Deal Makers"***

Growing innovation-oriented companies involves a process of assembling the right management team, board, investors and strategic partners. Like virtually any other small-to-medium sized community, Chico does not possess enough of these folks. These include serial entrepreneurs, industry veterans, business development executives, and highly specialized services providers. As a result, local entrepreneurs struggle in finding and attracting all the components of their "extended" team. More linkages to the innovation centers of the universe is required to access the "extended" team members that are essential to growing companies. We can't go it alone.

## Innovation Maturity Model

Grow-California has created a **4-level Innovation Maturity Model** for each of the 11 major categories it has determined are key contributors to, or influencers of, innovative growth companies. In ascending order, the levels include (1) Nascent Level; (2) Limited Level; (3) Emerging Level; and (4) Mature Level. Because the Innovation Scorecard is intended to help communities identify and address their 3-to-5 most-pressing impediments, identified impediments identified will, in most cases, be at the Nascent or Limited Stage

### 4-Level Innovation Maturity Model



Chico's 4 identified Key Impediments are currently at the following level of Innovation Maturity:

1. Access to Seed and Early-Stage Capital: Nascent Level
2. Transportation – Ingress/Egress Into and Out of Community: Nascent to Limited Level
3. High Speed Internet – Nascent to Limited Level
4. Lack of Local Innovation Expertise and "Deal Makers" – Nascent Level

## Recommendations/Next Steps



"We (the Chico Community) have to do a better job of getting local capital to the very best local ideas and entrepreneurs."

- Steven P. Hoke, V.P., Morgan Stanley Smith Barney

To accelerate realization of the benefits of locally-developed, innovative firms, a number of specific recommendations are made to address the 4 key impediments. To the extent Chico can improve its Innovation Readiness Score from 56 to 75 over a 5-year period of focused effort, it will be able to transition from primarily a "Nascent" level of Innovation Maturity up to the 3<sup>rd</sup> level of the Maturity Model, the Emerging Level. The preliminary suggestions on action items and next steps for discussion include:

### 1. Purposeful Innovation Network

A cross-collaborative, active innovation network(s) is needed. Because many innovative concerns are addressing—in isolation—similar issues (e.g., capital access, intellectual property, talent acquisition and development, market expansion), efficiencies and synergistic benefits can be gained by fostering meaningful networking among innovative firms.

### 2. Access to Capital – Particularly Seed and Early Stage Investment Capital

- Form an angel investor group (or some variation of that concept)
  - Join Angel Capital Association, become active
  - Create the group on a regional basis (including Shasta Co. and Nevada Co.)
  - Host a "Power of Angel Investing" seminar
  - Incorporate members with specialized expertise (some of whom may not be local to help bring professional investment capital capacity)
- Create an "Angel Side Car" Fund to leverage resources, mitigate risk
- Become a community "pooled LP" in an early-stage fund like Wavepoint Ventures
- Have several local accredited investors join the Sacramento Angels or other angel groups in Northern California or Northern Nevada
- Establish a new kind of financing entity or investment bank
- Build more personal and community ties to Silicon Valley angels, VCs and Investment Bankers (start an annual "Road Show" to Sand Hill Road)
- Put more time and energy into making local deals more fundable (create a standard stock option plan for those who help)
- Sponsor key investment conferences and have a significant presence

### 3. Transportation – Ingress/Egress Into and Out of the Community

- Establish a subsidized or shared executive stand-by air service
- Establish a study group (including those most affected) to carefully look at this issue
- Explore an airline guarantee program

- Establish a shared or subsidized pre-scheduled charter service
- Persuade commercial carriers to add new flight destinations

#### 4. High Speed Internet

- Through CENIC, CSU Chico has access to ultra-high bandwidth; the potential to extend access this bandwidth throughout the tech community should be fully explored
- Encourage the tech sector to collectively identify solutions and share in the cost and the benefit of making it happen

#### 5. Lack of Local Innovation Expertise and "Deal Makers"

- Establish an economic development office or ongoing presence in the Bay Area (think like Foreign Countries do, as an example)
- Organize industry-specific trade missions
- Organize geographic market trade missions
- Sponsor annually key technology conferences and have a major presence
- Continue to build on alumni base in Bay Area (COME HOME TO CHICO)
- Create a targeted hit list of highly specialized service providers, major corporations, etc. and create relationships with them

## Local Innovators: 56 Companies to Watch!

To be included, companies generally must possess the following attributes:

1. Growth-focused: Indicated by revenue and employee growth, both historically and projected
2. Large markets: statewide, national or global, indicated by the current or project customer base, or key strategic partners
3. Locally owned or operated: local headquarters, or in the case of a subsidiary, significant local operational decision making and local management of operations.
4. Innovative Products: Indicated by patents, trademarks, copyrights or unique business processes that yield a significant competitive advantage.
5. Exclusions: Local branches of multi-national corporations that focus on selling to local markets; franchises (except for headquarters), regionally focused retail and service businesses are generally not considered innovative growth companies.

Collectively, the companies identified below comprise a growing and powerful force in the community. Yet, in many cases, they are often operating "under the radar screen". A concerted community-wide efforts to assist these companies should be made a top priority if for no other reason than establishing Chico as "Innovator Friendly". As a starting point, capturing benchmark data on some key economic metrics associated with this group of companies would be extremely valuable and should be initiated as soon as possible.

#### Start-Up Sensations: (10)

Early stage companies, almost always under 5 years, and in many cases less than 2 years, that have innovative products or services they are seeking to scale nationally or globally. Often seeking outside investment capital, or other forms of specialized start-up assistance.

- |                         |                              |                   |
|-------------------------|------------------------------|-------------------|
| • College Scheduler     | • Green Polymer Technologies | • BizNess Apps    |
| • Photometrics          | • Exit Row Solutions         | • Trails Ventures |
| • Springboard Biodiesel | • Work Truck Solutions       |                   |
| • Nuvolase              |                              |                   |

### Hidden Gems: (15)

Important contributors to the economy, and in many cases relatively unknown in their communities, these companies are often 5-15 years old, and generating between \$1-5M in annual revenue. Many maintain potential for significant growth, though in some cases they operate in niche markets.

- Greenfeet
- Clean Flame
- Bender Brothers
- Lulus
- Advanced Light Technologies
- Novasyte
- Chico Bag
- Kleen Kanteen
- Maisie Jane's California Sunshine
- Lucero Olive Oil
- Lode Star Olive Oil
- Moby Wrap
- Overland Solutions
- E3 Organics
- Patholase

### Mid Market Marvels (16)

Also important contributors to the local economy, many of these businesses have been in existence for 10-25 years, and revenue can vary widely from a few million annually to \$50M or more. They are often significant local employers as well. While some of these companies prefer maintaining a lifestyle business orientation, others are seeking outside capital or expertise to significantly scale their company.

- USTC/Kerner Industries
- Creative Composition
- A Main Hobbies
- Mary's Gone Crackers
- Mooney Farms
- Rumiano Cheese
- Cascade Orthopedic Supply
- Pro Pacific Fresh
- Travidia
- Transfer Flow Inc.
- Nor-Cal Mobility
- Weiss McNair
- Duche Net
- Lares Research
- FAFCO
- Videomaker

### Emerging Market Leaders (6)

Often these companies have highly innovative products, technologies, brands or business processes. They have the potential to become significant market leaders and local icon companies. The cut across a wide swathe of industries. In some cases, they are venture-backed, in others they have grown organically with internal cash flow.

- Fifth Sun
- Landacorp
- Digital Path
- Sungard Public Sector
- Recology

### Local Innovation Icons (5)

These companies are a small subset of the innovation ecosystem, and well-respected as major economic contributors to the local economy. In many cases they are leading employers and are the envy of the community.

- Sierra Nevada Brewing Company
- Enloe Medical Center
- Lundberg Family Farms
- Bell Carter Olives
- California Olive Ranch

### Global Giants (4)

Global giants are typically local homegrown companies that achieved a significant amount of success, and then were acquired by a major national or global company. They continue to have local leadership involved in influencing and decision-making.

- Graphics Packaging
- Build.com
- Auctiva
- Smucker Quality Beverage

