



NORTH OLYMPIC PENINSULA RESOURCE CONSERVATION & DEVELOPMENT COUNCIL



Comprehensive Economic Development Strategy (CEDS)

2021 – 2025



Clallam County WA • Jefferson County WA



October 2021



NODC
NORTH OLYMPIC DEVELOPMENT COUNCIL

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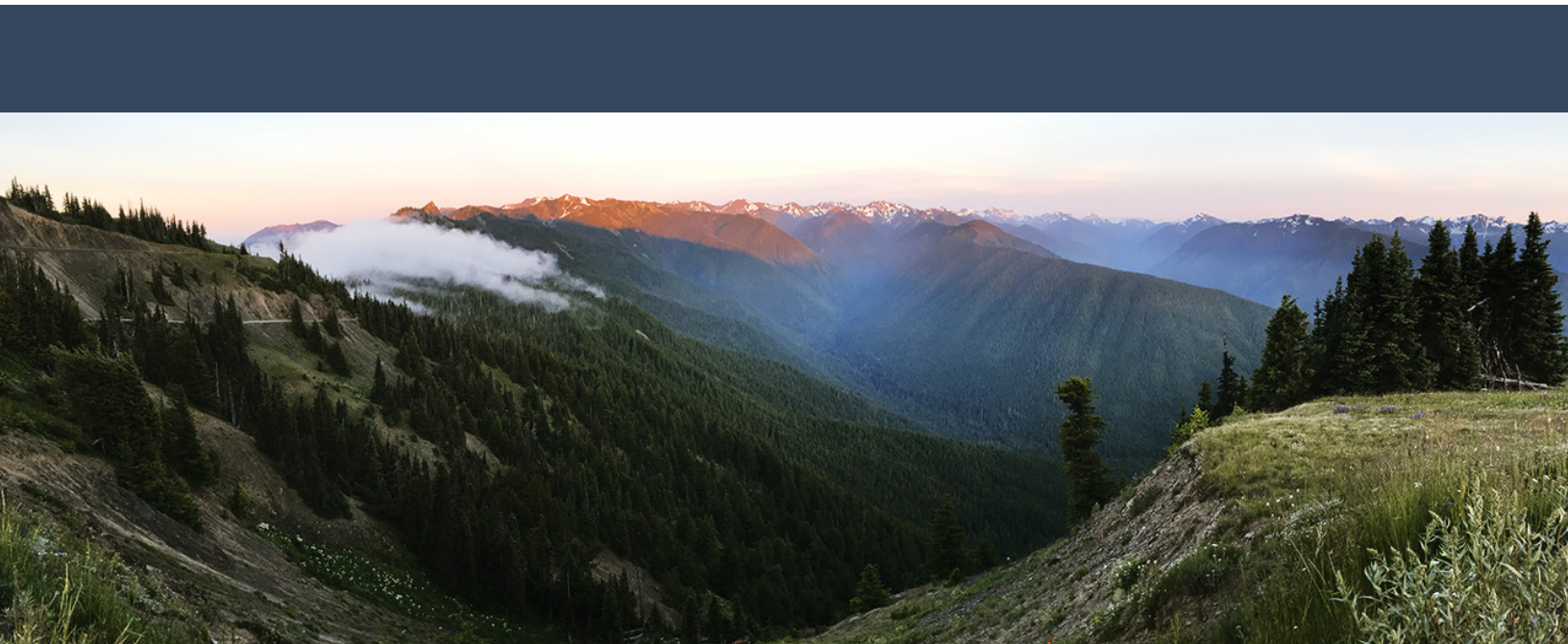
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North Olympic Peninsula Comprehensive Economic Development Strategy 2021 – 2025

October 2021

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Executive Summary

The economy and cultures of the North Olympic Peninsula have long been shaped by and dependent upon the abundant natural resources of the area. The natural ports, agricultural soils, rich forests and fisheries of Clallam and Jefferson Counties have provided livelihoods for generations of residents. Olympic National Park, which occupies the center of the Peninsula, has been designated an UNESCO World Heritage Site and International Biosphere Reserve, drawing more than three million visitors to the region each year. The region is part of the traditional lands of the S'Klallam, Makah, Hoh, Quileute, Chemakum, and Quinault peoples and is the current home to the Jamestown S'Klallam, Lower Elwha Klallam, Makah, Hoh, Quileute and Quinault tribal nations. In recent years, diminishing fisheries, forests and farms, climate change and the COVID-19 pandemic have highlighted once again the need to build a diversified, sustainable and innovative economy that will be resilient in the face of change.

The vision statement of the North Olympic Peninsula Resource Conservation & Development Council (NODC), the designated economic development district (EDD) for the two-county region, reflects the importance of building on the many place-based assets of the region:

“Whether drawn by the extraordinary natural resources, the world-class beauty and recreation or the strong sense of community, many people and businesses are here because they want to be here, and that drives a particular kind of investment and engagement. Businesses here are deeply invested in the workers and families they support, in helping their neighbors, in improving schools, in managing resources responsibly. Our vision is to build on this “Connection to Place” to create a thriving and inclusive economy through a collaborative, triple-bottom-line approach resulting in economic, environmental and social prosperity.”

From this vision statement come four goals for the region’s comprehensive economic development strategy:

1. ***A Diversified, Resilient Economy***
2. ***Opportunity and Prosperity for All***
3. ***Strengthened and Sustainable Infrastructure***
4. ***Protected and Enhanced Cultural and Natural Assets***

Goal 1 builds on the region’s strengths while also supporting innovation and diversification. Goal 2 strives to create prosperity for all by connecting individuals to economic opportunity. Goal 3 ensures that the infrastructure underlying the economy is strong and sustainable. Goal 4 builds on the cultural and natural assets to sustain quality of life for all who live in the region.

Connection to place underlies the entire strategy, because it is critical to ensure that all strategies are undertaken with a respect for maintaining this sense of place and ensuring the resiliency of the natural resources on which the economy and community are built.

Implementation

NODC's mission is "to empower the North Olympic Peninsula to pursue and invest in its own economic and environmental destiny."

In pursuit of its mission, NODC plays the following roles:

- Regional Economic Development Planning – produce Comprehensive Economic Development Strategy (CEDS) every 5 years with annual updates in between.
- Support economic development in key sectors identified in the CEDS.
- Support development of physical, economic and social infrastructure in the region such as broadband expansion.
- Act as a convener and implement projects that fill gaps.

Implementation of this strategy will require strong collaboration and partnership, and, in some areas, leadership development and capacity building. Local governments, tribal nations and a variety of organizations and institutions will take the lead on particular strategies that align with their missions.

One challenge is the disconnected approach to planning for, addressing and funding issues that are deeply interconnected. For example, housing development is not in general the role of economic development organizations, or of Economic Development Districts in particular, and yet skyrocketing housing prices and the lack of available workforce housing are major barriers to successful economic development. Workforce development and infrastructure development are not the role of housing organizations, and yet the absence of skilled construction workers or stormwater and wastewater infrastructure are major barriers to increasing housing stock.

Another challenge faced by rural areas like the North Olympic Peninsula is the sheer cost of building infrastructure and affordable housing. Construction costs are at least as high in rural areas as in

urban ones, and sometimes higher because of the lack of economies of scale. Rural areas have a much smaller tax base because they serve a smaller population, collecting fewer user fees to cover the costs; as a result, such projects are often less competitive for grant funding than urban projects.

This economic development strategy includes strategies for housing and childcare because of their critical importance to having a sufficient workforce. However, progress on those issues is largely dependent on the leadership and capacity of local governments and housing and human service organizations.

Resilience and COVID

The COVID pandemic continues. The rural character and geographic isolation of the North Olympic Peninsula mitigated some of the effects of COVID-19. However, pandemic-related closures still had a devastating effect on many parts of the region's economy. Particularly hard



hit was the tourism industry, a sector that accounts for approximately 20 percent of jobs in the two counties. The closing of the border with Canada halted ferry service between Port Angeles and Victoria, British Columbia, which carried more than 470,000 passengers in 2019. National and international visitors were unable to travel, deeply affecting lodging, restaurant and retail businesses that rely on tourist traffic for a significant portion of their revenue. While the post-pandemic trends of closer, regional travel and the preference for outdoor exploration and activities helped support a relatively quick resurgence of tourism to the Olympic Peninsula, its impact was not evenly distributed across all tourism businesses, and visitor demographics changed. For a labor-intensive industry segment like hospitality and tourism, the area labor shortages and supply chain shortages present ongoing challenges.



As local government and economic development organizations came together to address the immediate crises and strategize for recovery and resiliency, their recommendations continue to be very much in line with the SWOT analysis and action plan of this CEDS. There is broad agreement on several strategies as being key to continued resilience. The pandemic has led to a recognition of key areas to work on for better resilience to future emergencies:

- **Expand access to broadband.** The pandemic highlighted just how important access to broadband is for teleworking and online education. This is a continued goal for this region and all rural regions, as those areas outside city boundaries face expensive internet service at sub-broadband speeds.
- **Diversify the economy.** The broad impacts on the tourism sector and the businesses that depend on it reinforce the need for further diversification of the economy. There is also a need to reduce the reliance of the natural resource segment of the economy on export markets by increasing local demand and encouraging value adding.
- **Build on the strengths of the region** in the marine trades, green innovations, agriculture and food systems, forest products and the arts and creative sector, which will lead to a more diverse, resilient economy.
- **Improve support systems for local businesses.** Small businesses form the basis of the North Olympic Peninsula economy. The pandemic has had a devastating effect on many of these businesses. This has highlighted the need for training and support systems for entrepreneurs. Training and coaching on business growth, succession, contingency planning and risk management is a high priority, along with flexible alternative financing and assistance with online marketing. Creating local and regional markets for local products is important in this region also.

These strategies and others needed for continued regional economic development and resilience are included in the following economic development strategy.

Context

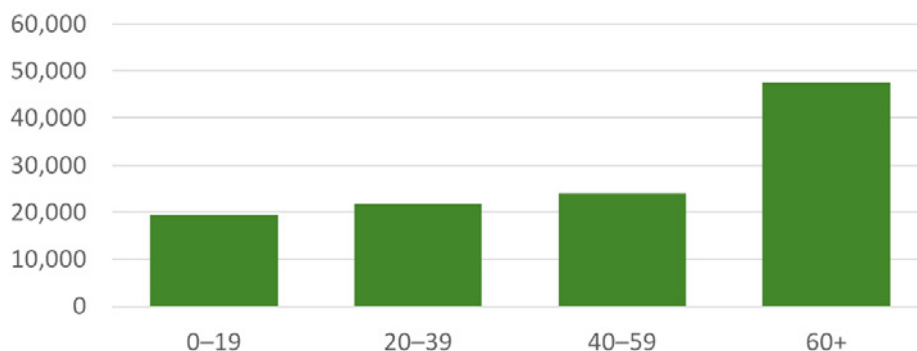
Population & Demographics

| Jefferson County ¹ | Clallam County ² |
|-------------------------------|-----------------------------|
| 2020 Population: 32,977 | 2020 Population: 78,067 |
| Median Age: 58.3 | Median Age: 50.8 |
| 2030 Projection: 36,431 | 2030 Projection: 85,957 |
| Projected Growth: 10.5% | Projected Growth: 10.1% |

The total population of the two-county North Olympic Peninsula region is approximately 111,044. There is a high percentage of older people in the region, where Jefferson County's median age is the highest of any county in Washington, and Clallam County's median age is the sixth highest. The national average for an area this size is 32,967 people 55 or older, while there are 55,062 in this region³.

Age Demographics⁴ (Jefferson & Clallam Combined)

There are as many people 60+ as there are 0-39.



The non-white population in this region is growing slowly but steadily. Diversity in the region increased 22% between 2010-2020, while the population who identified as white increased only 8% during that same time frame. Approximately 16% of people in the region identify as black, indigenous or a person of color. This is lower than the national average for diversity of 40%.⁶

¹ EMSI (www.economicmodeling.com)

² EMSI (www.economicmodeling.com)

³ EMSI (www.economicmodeling.com)

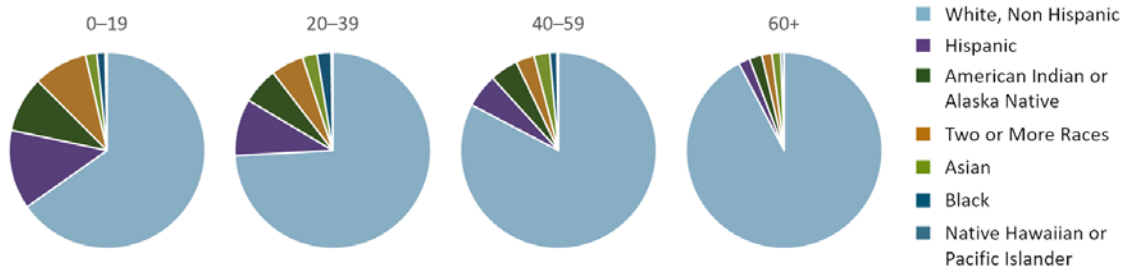
⁴ EMSI (www.economicmodeling.com)

⁵ EMSI (www.economicmodeling.com)

⁶ <https://www.census.gov/>

Diversity (Jefferson & Clallam Combined)

Younger people are significantly more diverse than older people in the region.



Poverty and Wealth Disparity

The table below shows income inequality for the two counties. It is significantly more unequal in Jefferson County than in Clallam County.

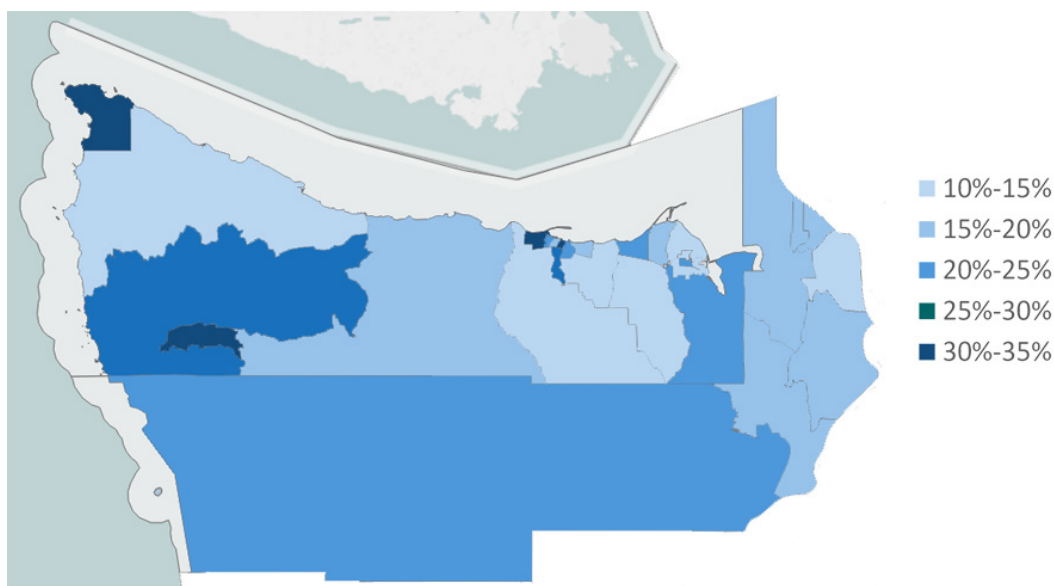
| County ⁷ | Average annual income of the top 1% | Average income of everyone else | The top 1% makes x more than the bottom 99% |
|---------------------|-------------------------------------|---------------------------------|---|
| Jefferson County | \$1,103,624 | \$47,404 | 23.3 |
| Clallam County | \$499,025 | \$38,184 | 13.1 |
| WA State | \$1,383,223 | \$57,100 | 24.2 |
| United States | \$1,316,985 | \$50,107 | 26.3 |

11.2% of people are living at or below 125% of the poverty level in Clallam County, and 12.6% in Jefferson County.⁸ However, there are pockets of much higher poverty in each county, particularly in more rural parts of the counties and tribal areas. For Washington State as a whole, the percentage of population in poverty is 9.8.

⁷ Economic Policy Institute. <https://www.epi.org/multimedia/unequal-states-of-america/#/Washington>

⁸ United States Census, 2019

Percent of individuals living at or below 125% of the Federal Poverty level⁹

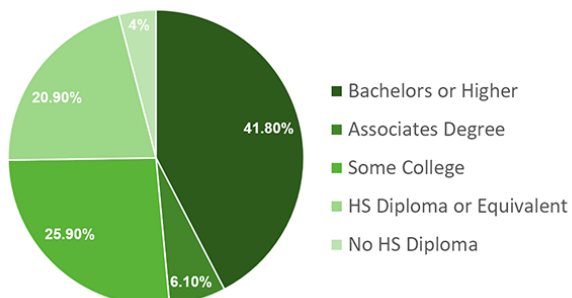


The poverty and wealth disparity reflect the struggle that many people face in securing employment with a livable wage, and in accessing decent and affordable housing, healthcare, childcare, and other services. This poverty and disparity is greater for younger people and people of color and enhances problems related to the aging workforce nearing retirement. Inequality also undermines a sense of equality and results in a disparity of influence over decision-making and use of resources.

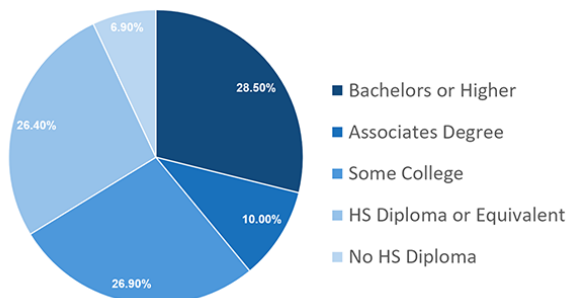
Educational Attainment of Adults Age 25+

The national average for persons completing a bachelor's degree or higher is 32%, and the state average is 36%.¹⁰ Jefferson County exceeds the state average by almost 6%, and Clallam County is below the state average by 8%. Many of the more educated individuals in Jefferson County in particular are retirees who moved to the area and are not in the workforce. The working population, therefore, has a lower education level than data including retirees suggests. Although they are not in the workforce, many of these educated retirees add to the community in a volunteer capacity.

Jefferson County



Clallam County



⁹ 2021 FFIEC Census Reports: www.ffiec.gov/census/Default.aspx

¹⁰ Washington State Employment Security Department County Data Tables (<https://esd.wa.gov/labormarketinfo/report-library>)

Workforce & Employment Data

There are approximately **38,016** people in the workforce in the two counties. From 2015 to 2020, jobs increased by 1.6% in Clallam County from 26,503 to 26,923 (0.3% higher than the national growth rate of 1.3%), and the labor force participation rate increased from 42.8% to 43.0%. From 2015 to 2020, jobs increased by 7.2% in Jefferson County from 10,348 to 11,093 (5.9% higher than the national growth rate), and the labor force participation rate increased from 41.9% to 43.6%.¹¹ As of 2019, people ages 55+ made up 29% of the workforce in Clallam County and 30% in Jefferson County. The labor force participation rates for both counties are significantly lower than the state average of 65%,¹² which is largely due to the high retiree population.

A significant portion of the workforce is made up of people ages 55+, which presents a high risk in this area for losing workforce. Having a population with a large number of retirees and near-retirees, and not as many younger people, will have implications for finding young workers to fill job vacancies in the future. It is currently difficult to attract professionals with young families to the region, because of housing costs and availability, limited career path options, and limited amenities for families.

Unemployment

As of August 2021, the unemployment rate for the region was 5.7%.¹³ Over the past 30 years, the unemployment rates in the region have been higher than the state and national averages by up to 4%, with Clallam County's unemployment usually running a little higher than Jefferson County's (see graphs for each county in Appendix D).

Top Industries: # of Jobs

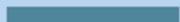












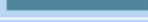

The charts below show the top industries in each county by number of jobs. While this information is important, it can be misleading for a few reasons. First, many industries are split up into different industry codes, so they do not show up in the highest rankings even if they provide many jobs. For example, some logging businesses show up in the transportation sector. The maritime sector is split among transportation and warehousing, maintenance and repair and manufacturing. Local government jobs are high, because they include a range of employees such as those in schools and healthcare institutions combined. It's important to recognize that, when taken together, small businesses are the largest employer in the region, but they are dispersed across industry codes and therefore do not show up as a category in the job rankings.

¹¹ EMSI (www.economicmodeling.com)
















¹² Washington State Employment Security Department County Data Tables (<https://esd.wa.gov/labormarketinfo/report-library>)

¹³ Washington State Employment Security Department Local Area Unemployment Statistics: <https://esd.wa.gov/labormarketinfo/labor-force>

Clallam County¹⁴

| Industry | 2015 | 2020 | # Change in Jobs | % Change in Jobs | 2020 Earnings Per Worker |
|--|-------|-------|------------------|------------------|--|
| Local Government | 5,783 | 6,057 | 274 | 5% |  \$83,323 |
| Food Services and Drinking Places | 2,048 | 1,758 | -289 | -14% |  \$24,425 |
| Social Assistance | 1,061 | 1,233 | 171 | 16% |  \$29,065 |
| State Government | 1,177 | 1,149 | -28 | -2% |  \$82,304 |
| Ambulatory Health Care Services | 1,008 | 1,099 | 91 | 9% |  \$65,674 |
| Federal Government | 961 | 1,068 | 107 | 11% |  \$69,874 |
| Specialty Trade Contractors | 888 | 1,055 | 167 | 19% |  \$49,536 |
| General Merchandise Stores | 934 | 937 | 3 | 0% |  \$42,197 |
| Administrative and Support Services | 870 | 901 | 31 | 4% |  \$34,751 |
| Professional, Scientific, and Technical Services | 786 | 874 | 88 | 11% |  \$58,882 |
| Food and Beverage Stores | 835 | 863 | 27 | 3% |  \$39,789 |
| Nursing and Residential Care Facilities | 822 | 709 | -112 | -14% |  \$44,797 |
| Religious, Grantmaking, Civic, Professional, and Similar Organizations | 507 | 483 | -24 | -5% |  \$27,860 |
| Forestry and Logging | 504 | 481 | -22 | -4% |  \$68,686 |
| Construction of Buildings | 404 | 468 | 64 | 16% |  \$43,182 |

Jefferson County¹⁵

| Industry | 2015 | 2020 | # Change in Jobs | % Change in Jobs | 2020 Earnings Per Worker |
|--|-------|-------|------------------|------------------|--|
| Local Government | 1,871 | 2,034 | 163 | 9% |  \$89,260 |
| Food Services and Drinking Places | 862 | 646 | -216 | -25% |  \$20,444 |
| Specialty Trade Contractors | 434 | 581 | 147 | 34% |  \$52,825 |
| Social Assistance | 526 | 566 | 40 | 8% |  \$33,916 |
| Professional, Scientific, and Technical Services | 484 | 549 | 66 | 14% |  \$71,616 |
| Food and Beverage Stores | 480 | 526 | 46 | 10% |  \$42,097 |
| Federal Government | 260 | 522 | 262 | 101% |  \$53,848 |
| Administrative and Support Services | 361 | 468 | 107 | 30% |  \$33,600 |
| Construction of Buildings | 262 | 326 | 64 | 24% |  \$52,909 |
| Religious, Grantmaking, Civic, Professional, and Similar Organizations | 280 | 291 | 11 | 4% |  \$37,337 |
| Ambulatory Health Care Services | 302 | 272 | -30 | -10% |  \$55,262 |
| State Government | 271 | 267 | -5 | -2% |  \$82,017 |
| Repair and Maintenance | 221 | 214 | -7 | -3% |  \$44,959 |
| Miscellaneous Store Retailers | 167 | 211 | 44 | 26% |  \$25,375 |
| Educational Services | 226 | 207 | -20 | -9% |  \$32,340 |

(Some changes in # of jobs are due to COVID-19, such as the reduction in jobs in the food services and drinking places sector.)

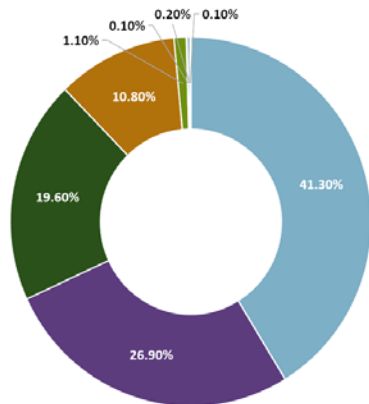
¹⁴ EMSI (www.economicmodeling.com)

¹⁵ EMSI (www.economicmodeling.com)

Business Size

There are approximately 5,148 businesses registered in the region. The graphs below reflect the size of these businesses and the important role that smaller businesses play in the region. Some of the larger businesses may be headquartered in the region, but have locations and employees outside of the region.

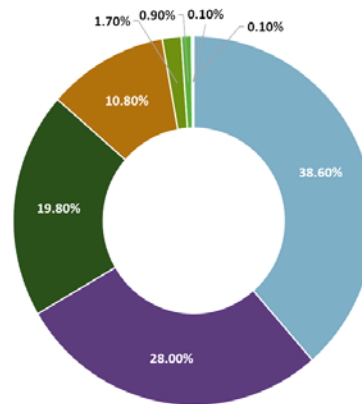
Jefferson County¹⁶



Business Count

| | |
|----------------------|-----|
| 1 to 4 employees | 695 |
| 5 to 9 employees | 452 |
| 10 to 19 employees | 329 |
| 20 to 49 employees | 181 |
| 50 to 99 employees | 19 |
| 100 to 249 employees | 2 |
| 250 to 499 employees | 3 |
| 500+ employees | 1 |

Clallam County¹⁷



Business Count

| | |
|----------------------|-------|
| 1 to 4 employees | 1,339 |
| 5 to 9 employees | 972 |
| 10 to 19 employees | 687 |
| 20 to 49 employees | 373 |
| 50 to 99 employees | 58 |
| 100 to 249 employees | 30 |
| 250 to 499 employees | 5 |
| 500+ employees | 2 |

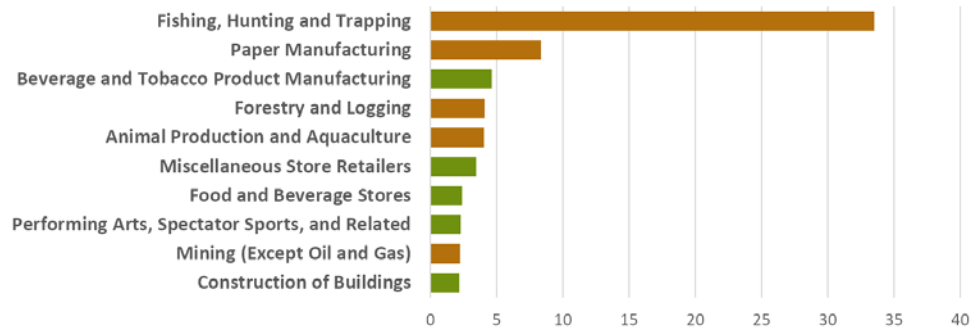
¹⁶ Data from DatabaseUSA.com (through EMSI)

¹⁷ Data from DatabaseUSA.com (through EMSI)

Location Quotient

Location Quotient represents the regional industry concentration relative to the national average. These graphs¹⁸ reflect the area's richness in natural resources and corresponding concentration of related industries.

Jefferson County Location Quotient



Clallam County Location Quotient



¹⁸ EMSI (www.economicmodeling.com)

SWOT Analysis

"The continuing transition from an economy primarily reliant on natural resources to one that is more diversified and resilient is the biggest challenge and biggest opportunity."

– Interviewee

The CEDS is built around the strengths, weaknesses, opportunities and threats specific to this region. The Economic Development Administration's guide to CEDS content highlights the importance of evaluating the economy through the lens of multiple forms of community capitals:

"There are numerous options to consider (depending upon regional priorities, as noted above) when thinking about how to measure regional capacity building and prosperity. However, the concept of wealth is one that should be highlighted because of its natural alignment with asset-based strategies and approaches. More than just jobs and income, regional wealth is represented by intellectual, individual, social, natural, built environment, political, financial, and cultural assets. These assets, when invested in, nurtured, and leveraged appropriately, can reflect the true level of a region's economic (and social) well-being. Finding ways to better identify, foster, and measure these assets can help a region towards a more lasting prosperity since a focus on wealth creation and retention can build a region's resiliency and long-term sustainability." – EDA website

These forms of capital emphasize factors such as wellness, skills, social networks, knowledge, creativity, and culture, as well as more traditional measures of wealth such as financial and built capital and natural resources – all critical pieces of economic development. All forms of capital need to be strong for communities to be resilient and for individuals to thrive, so the intention is to build up all forms of capital at the expense of none. Communities need to build those capitals that are weak, to be more successful in their economic development efforts. The strong capitals are assets on which to build a region's economic development opportunities. People's views of where capital is strong or weak depends on where they sit in a community – a form of capital could be strong for some, but weak for others. These capitals include the following:

Individual Capital: The existing stock of skills, understanding, physical health and mental wellness in a region's people.

Intellectual Capital: The existing stock of knowledge, resourcefulness, creativity and innovation in a region's people, institutions, organizations and sectors.

Social Capital: The existing stock of trust, relationships and networks in a region's population.

Cultural Capital: The existing stock of traditions, customs, ways of doing, and world views in a region's population.

Natural Capital: The existing stock of natural resources – for example, water, land, air, plants and animals – in a region's places.

Built Capital: The existing stock of constructed infrastructure – for example, buildings, sewer systems, broadband, roads – in a region's places.

Political Capital: The existing stock of goodwill, influence and power that people, organizations and institutions in the region can exercise in decision-making.

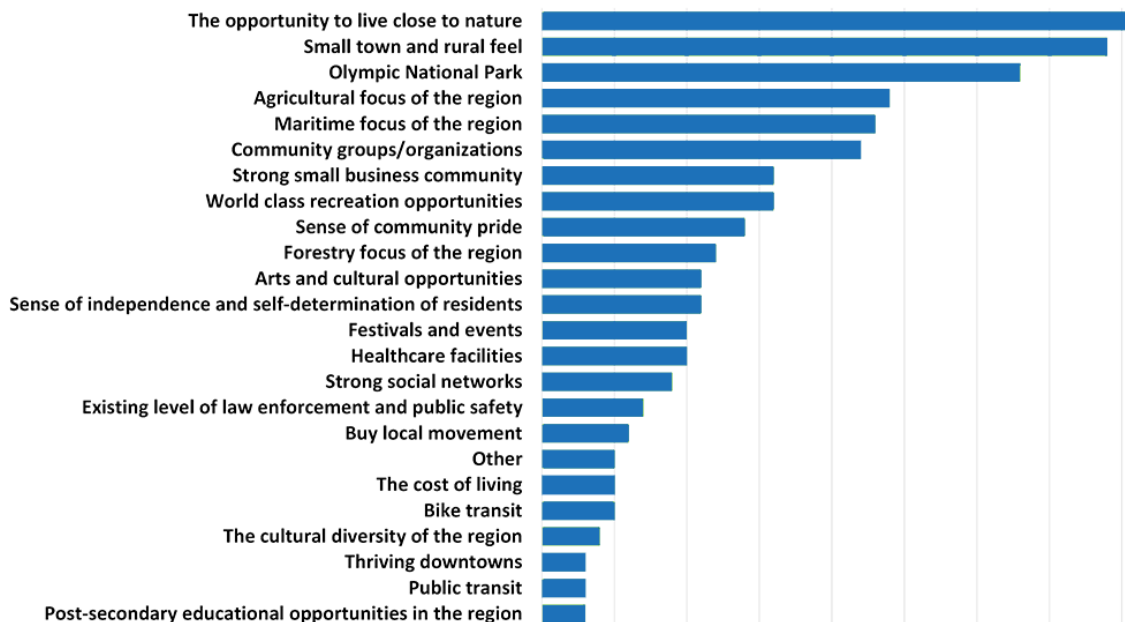
Financial Capital: The existing stock of monetary resources available in the region for investment in the region.



Below, we show how 57 respondents surveyed during the CEDS process assessed the strengths (assets), weaknesses, opportunities, and threats. In the Strategic Direction/Action Plan section of this document, we highlight strengths, weaknesses, opportunities, and threats in the framework of capitals related to each goal.

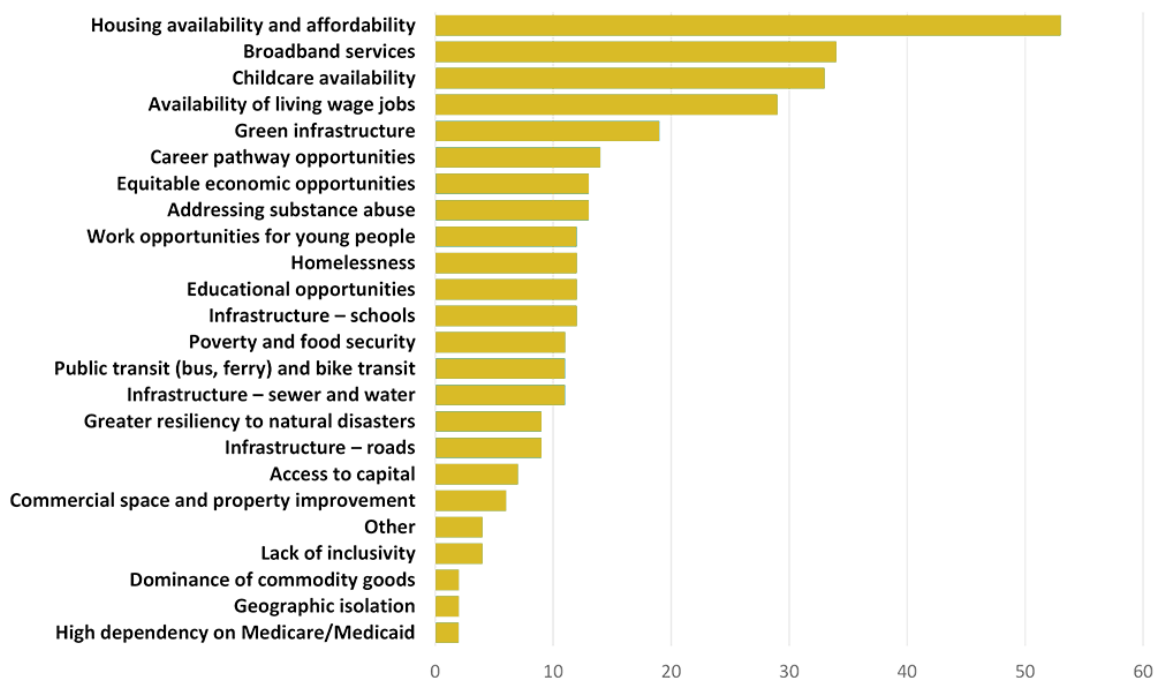
Strengths (Assets)

What are the greatest assets and characteristics of the North Olympic Peninsula?



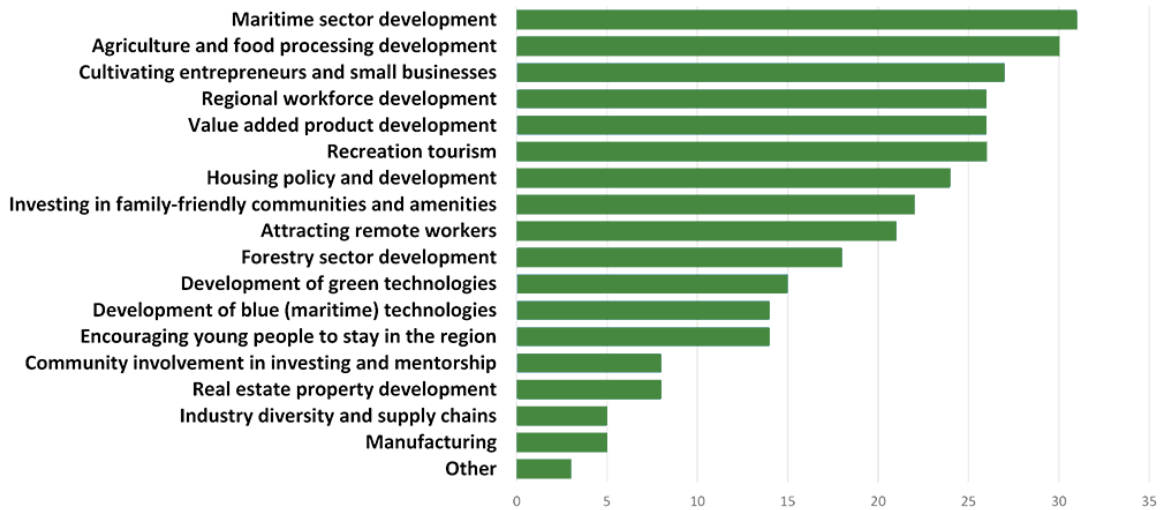
Weaknesses

What do you think most needs to be changed or improved in the North Olympic Peninsula region?



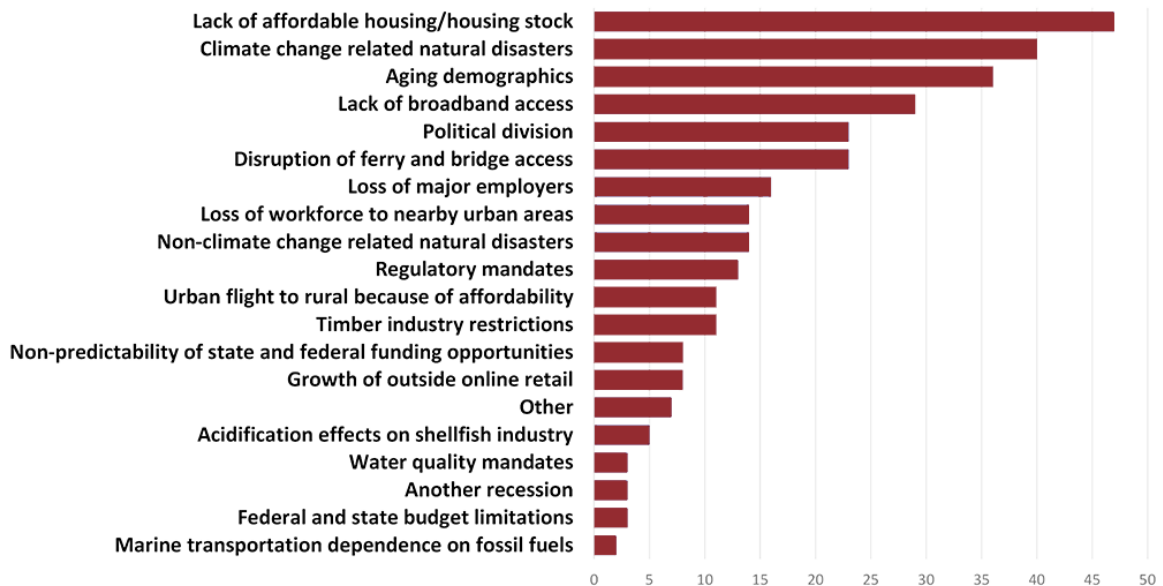
Opportunities

What do you see as the most promising opportunities in the region?



Threats

What do you see as potential threats to the long-term resilience of the regional economy?



Resilience

The North Olympic Peninsula, comprising Jefferson and Clallam Counties, contains over 4,800 square miles of forests, mountains and shorelines of scenic beauty. Most of the 108,000 residents of the Peninsula live in municipalities along the coastline – Port Angeles, Sequim and Port Townsend, which is home to working waterfronts and ports. The rural, resource-based history of the area can be seen in farming communities and lumber mill hamlets. Olympic National Park, the 9th most visited national park in the US with 3.25 million visitors pre-pandemic in 2019, is at the geographic heart of the region, with nearly a million acres and 900 miles of hiking trails surrounded by a wide band of National Forest on all sides.

In the center of the peninsula are the Olympic Mountains, to the west are the dense rainforest valleys where rainfall can approach 200 inches a year¹⁹, and 73 miles of Pacific coastline is accessible by car in only a few places. The area is bordered to the north by the Strait of Juan de Fuca with ferry boat access to Victoria, British Columbia, Canada, and to the east by the Hood Canal – a 60-mile-long glacier-carved fjord. US Hwy 101 encircles the entire North Olympic Peninsula, providing the only roadway access to the area.

Natural Resources/Environment

The economy of the North Olympic Peninsula is dependent on its natural beauty, natural resources and healthy environment. This is illustrated by the strength of the industries and sectors using working lands and working waterfronts. Agriculture/forestry/fishing/hunting is the 4th highest growing industry and the top industry and top occupation for location quotient in Jefferson County. In Clallam County, it is the 7th highest growing industry, and the top industry and top occupation for location quotient.



¹⁹ Olympic National Forest Climate Information. https://www.fs.usda.gov/detail/olympic/about-forest/?cid=fsbdev3_049559

The North Olympic Peninsula's ports – including Port Angeles, Sequim and Port Townsend – are home to the region's burgeoning maritime sector, which supports job creation. Port Angeles, for example, and its position on the Strait of Juan de Fuca, its location on a deep-water harbor, the industrial facilities that support marine and air transportation, and access to natural resources all contribute to a robust economic engine. The Port of Port Townsend operates three marinas, a marine trades industrial area, an international airport, and is home to boat building and craftsmen and women.



The Peninsula also has a robust diversified agriculture sector. In Clallam County in 2017, there were 17,197 acres in agriculture, which is a 27% decline since 2012; the average size of farms, 33 acres, also declined by 26% since 2012.²⁰ In Jefferson County in 2017, there were 13,753 acres in agriculture, which is a 12% decline since 2012; the average size of farms, 62 acres, is declining as well, by 12% since 2012.²¹ To be more resilient, the agricultural sector needs to find ways to add value to its products to allow for higher wages for farm families.



The North Olympic Peninsula is also home to an array of nature-based recreation opportunities, including Olympic National Park, Olympic National Forest, the 135-mile Olympic Discovery Trail, the Dungeness Spit, and water-based recreation along its coastlines. Over 2.5 million are visiting Olympic National Park alone.

Regional Forces

There are a variety of forces that affect the resilience of the region, specifically related to its natural environment. Natural resource-based sectors are dependent upon maintaining a healthy environment and having a ready workforce.

1. **Housing and Working Landscapes.** There is a need for all kinds of housing, middle and upper income housing, affordable and workforce housing, on the Peninsula. Housing availability is critical to the success of the Peninsula's working landscape. Employers are already experiencing challenges in hiring, in significant part due to the lack of housing availability and affordability. The critical housing shortage has created development pressures on agricultural and forest lands.

²⁰ 2017 Census of Agriculture Profile: Clallam County, WA. https://www.nass.usda.gov/Publications/AgCensus/2017/Online_Resources/County_Profiles/Washington/cp53009.pdf

²¹ 2017 Census of Agriculture Profile: Jefferson County, WA. https://www.nass.usda.gov/Publications/AgCensus/2017/Online_Resources/County_Profiles/Washington/cp53031.pdf

2. **Resource Harvest and Conservation.** In any place with significant natural assets, and the North Olympic Peninsula is no exception, there is a need to balance harvests of natural resources with conservation and sustainability. With key industries in agriculture, forestry, maritime, aquaculture and recreation, much of the North Olympic Peninsula's economy relies on a healthy environment and the maintenance of stocks of natural assets, like clean water, clean air, healthy fish populations, and healthy forests.
3. **Recreation and Tourism Revenues and Impacts.** While the Peninsula benefits from a robust recreation and tourism sector, bringing in visitors from around the country and the world, there are negatives associated with attracting over two million visitors to the region. These can include:
 - a. Impacts to the quality and health of the very natural resources this sector and other natural resource-based sectors depend on.
 - b. Housing challenges
 - i. Competition for residential housing with tourism rentals.
 - ii. Lack of affordable housing for recreation/tourism workers.
 - c. Transportation
 - i. Recreation/tourism workers traveling farther to their jobs due to a lack of housing availability and affordability.
 - ii. Traffic congestion and greenhouse gas emissions from millions of tourists traveling in single cars on a two-lane highway.
 - d. Wages: Many tourism jobs in the service sector are low-wage, part-time or seasonal, but opportunities exist to create higher wage, skilled employment in recreation tourism.

Yet, tourism is often the "front door" to economic development. Many who later move here or move their businesses here come first as tourists. In addition, visitor spending and associated tax revenues are not readily replaced by the local community alone. The tax revenues that come to communities through visitor spending provide a tax "offset" to local households and help support a number of services that the region depends on, including schools, emergency services, and law enforcement.

Climate Change

Climate change is a force that is already having impacts on the region's weather and resilience. As the climate changes and temperatures climb, the North Olympic Peninsula faces serious impacts including:

- Reduction of summer stream flows
- Increase in winter flows
- Increased stream temperatures
- Diminishing snowpack extending the summer drought season
- Delayed onset of winter/freezing temperatures creating conditions for different insect infestation and diseases
- Shifts in timing and type of precipitation
- Coastal inundation due to ongoing sea level rise
- Extended warm temperatures
- Increasingly corrosive ocean waters
- Climate migrants from other parts of the country
- Increasing threats, frequency and intensity of forest fires and smoke

The impacts of climate change on the area are serious, and mitigation and adaptation efforts are crucial to regional resilience. However, a widely-distributed article published by ProPublica and the *New York Times Magazine* on September 15, 2020, that ranked U.S. counties by the severity of likely climate change impacts ranked both Clallam and Jefferson Counties among the 100 least-impacted counties out of the 3,143 counties in the country. Because of the moderate climate of the region and the less-severe climate change impacts projected here, there is a high likelihood of migration to the region from more severely affected areas, exacerbating the existing housing shortage.

The Peninsula could also become more isolated as a result of climate change. Planning for this possibility requires building on the region's self-sufficiency in terms of food, energy, and livelihoods, which has implications for the region's forestry and agriculture sectors and its workforce development opportunities and offerings. There may also be opportunities for the Peninsula to become a leader in green innovations and carbon sequestration technologies.

Transportation emissions are a large contributor to the greenhouse gas problem.²² The transportation sector is another area in which the region can work to have a sustainable impact, building more electric vehicle infrastructure, like charging stations, to make electric vehicles more workable for those in the region. This has implications for adding to the workforce as well, as there will be a need for people skilled in electric vehicle repair and infrastructure support.

Population Trends

The region's population is currently trending older with fewer young people remaining, due to a lack of career pathways, a lack of affordable housing, and a lack of social and cultural infrastructure to support young families. The region's economy has entry-level opportunities and executive managerial opportunities, with little in between; this makes it hard for those moving beyond entry-level work to find their next career step in the region. As a result, many young professionals feel the need to move out of the region to take their next career step. Building the region's career pathways to allow for career transitions will be key to making the region a place where all ages can find what they need.

Resilience Next Steps

The North Olympic Peninsula's resilience to natural disasters, whether climate change induced or not, as well as economic disruptions, similar to what the region and the entire country has been through due to COVID-19, is dependent upon balancing the varying forces mentioned above, providing opportunities for all populations, while maintaining the quantity and quality of the region's natural and human assets.

The discussion of resilience is ongoing, but there are some clear strategies for how to be more prepared for disasters of all kinds.

- **Diversification.** Economic diversification is critical to having a resilient economy. Expanding the region's economic focus to multiple sectors will itself create more resilience in livelihoods. In addition, leaders in these sectors need to be thinking about ways to create career pathways so that workers at all levels can find opportunities in the region.
- **Climate change planning.** Climate change is happening. Projections have been done showing the extent of sea level rise, rain patterns and other impacts, but one of the biggest effects

²² Washington Ecology. <https://ecology.wa.gov/Air-Climate/Climate-change/Greenhouse-gases/2018-Data>

is that the Peninsula will be less affected than many other parts of the country. There is an expectation that the region will be attractive to climate change migrants. With this comes the need to figure out how to manage additional population growth and its impacts on housing and land.

- **Disaster planning.** Despite a focus on resilience, it's still critical to plan for the worst, preparing systems and plans for natural disasters whether climate change-related or not (earthquake and tsunami). The region already has a Climate Change Preparedness Plan for the North Olympic Peninsula.²³ There are also hazard mitigation plans for the counties and Tribes.
- **Supply chains and distribution.** The COVID-19 pandemic has demonstrated the challenges inherent in supply chain management during a natural and/or economic disaster. The isolated nature of the Peninsula, reliant on bridge and ferry transport and distant from urban distribution centers, exacerbated those challenges. Shortages of certain items and supply chain disruptions revealed the vulnerability of delivery systems to the area. *"COVID-19 has revealed the weaknesses of a globalized manufacturing system and in order to respond we need to fundamentally rethink supply chains. Our goals in the medium term should be making them more regional, modifying the supply chain as a key business driver and putting back the human asset as the most important factor for an agile business to succeed."*²⁴
- **Capacity building.** Resilience for many means more than bouncing back to normal; it means building back better, through a focus on green economy and other innovations to build capacity to move forward.
- **Increase capacity and resilience of local food systems.** As a result of the pandemic, many grocers on the Peninsula found that, with distribution systems disrupted nationally, getting orders to isolated rural areas was a low priority for food distributors. Food deliveries were erratic and often included only partial orders. As part of its response to the pandemic, Jefferson County formed a Food System Resiliency Task Force that made a number of immediate and longer-term recommendations to ensure that food is available for area residents in the event of a disaster or another pandemic. One key recommendation was support for local agricultural producers and for food processing facilities to help preserve food that is grown here.

Key to resilience is implementing locally based economic development strategies that value and build upon place-based assets. The following Action Plan reflects a variety of possible strategies for improving the region's resilience.

²³ Climate Change Preparedness Plan for the North Olympic Peninsula. 2015.

<https://www.cakex.org/sites/default/files/documents/North%20Olympic%20Peninsula%20Plan.pdf>

²⁴ A Post COVID-19 outlook: the future of the supply chain. 2020. <https://www.imd.org/research-knowledge/articles/A-post-COVID-19-outlook-The-future-of-the-supply-chain/>

Strategic Direction/Action Plan

This section lays out a plan of action to guide the region toward its vision. Outcomes and strategies are organized under four deeply interrelated and mutually reinforcing goals:

1. *A Diversified, Resilient Economy*
2. *Opportunity and Prosperity for All*
3. *Strengthened and Sustainable Infrastructure*
4. *Protected and Enhanced Cultural and Natural Assets*

This strategy aims to build on the competitive advantages of the region that are embodied in its natural resources and beauty and the sectors that have developed and are rooted in this place. There is a strong focus on diversification of sectors, within sectors and of business sizes and models, and on generating higher wage jobs and business ownership opportunities.

Historically, this region was primarily dependent upon forestry, fisheries and agriculture. As some resources have become less available over time due to a combination of regulation and overharvest, the economy has transitioned, becoming more dependent on tourism and the service sector, which often pay lower wages, as well as local government and health care jobs.

Strategies in the natural resource area focus on preserving working landscapes through continued sustainable harvests; creating additional higher wage jobs through value-added processing and manufacturing; and improving revenues, profitability and wages by providing technical assistance and support for area businesses at all growth stages.



Key sectors highlighted in the strategy, including the maritime, forestry, and clean technology sectors, have the potential to create more higher paying jobs. While agricultural enterprises in our region don't typically pay high wages, the agriculture and food systems sector is included as a focus because of its importance to the resiliency of this geographically isolated region and because there is potential to increase profitability and wages through the strategies recommended in the CEDS. Agriculture also supports businesses at all stages of the value chain, such as farm supply and service businesses, value-adding and processing businesses, distributors and retailers, with a robust multiplier effect. Tourism is included in the strategy because it already provides 20% of the region's jobs, and intentional development of the sector has a better chance of enhancing economic opportunity and wages while reducing negative impacts.

Cross cutting themes include innovation, alternative business models, value-added processing (which includes various types of manufacturing), and sustainable technology. Supporting entrepreneurs, micro-enterprise and smaller businesses is also central to the strategy. To build on the connection to place that is central to the CEDS, there is a focus on recreation, arts and conservation. Critical to all of these sectors is building and supporting the infrastructure to allow for business and industry expansion, which in turn supports more job opportunities.

Creating an Enabling Environment

Many issues around human needs arose during the process of developing the CEDS, including access to healthcare, homelessness, mental health issues, food insecurity, and substance abuse. While the CEDS does not directly address these challenges, it is important to recognize that these factors are deeply connected to the economic health of the region. Income disparities as well as insufficient living wage jobs and economic opportunities contribute to these challenges; these challenges are closely intertwined with housing, childcare, education, workforce, and transit, and deeply affect the vibrancy of the economy and the well-being of individuals and the community overall.

CEDS Development Process

Content for the strategic direction was developed through workshops, interviews with economic development and local government stakeholders who represent their communities and constituents, review of existing plans in the region, and review of economic data about the region. Three workshops took place in August of 2021, including two in-person workshops held in Port Angeles and Chimacum, and a virtual workshop, which together engaged a total of 41 local government, economic development, nonprofit, industry, tribal and community representatives. Input from workshops was supplemented with interviews of 11 additional stakeholders. In addition to the community meetings and interviews, a SWOT survey gathered input from 57 respondents, and NODC received extensive input from strategy committee members and NODC members who were unable to attend the meetings. While workshop attendance was no doubt hampered due to COVID, there was broad representation, providing a variety of perspectives and ideas.

This process included engagement with tribal members from two of the region's many Tribes. Tribal engagement was limited due, in part, to the challenges posed by time constraints and the pandemic. The Tribes are important partners in the goals and strategies laid out here, and NODC looks forward to working with them and learning from them to advance the goals of the CEDS and their own economic development plans.

Goal 1: A Diversified, Resilient Economy

Strengths:

Abundant natural resources (natural capital) that support forestry, marine, agriculture, and fisheries sectors;

An extensive and historic port system (built and cultural capital) that supports transportation, industry, local culture, and tourism;

A culture of innovation and forward-thinking leaders (intellectual capital) that generates solutions in areas such as agriculture, business, and forestry, energy, and manufacturing;

Significant market access (financial capital) to the I-5 corridor (built capital), which is within two to three hours of most of the region, and ports provide some connections to global markets;

Strong commitment to businesses (social capital) in the form of businesses supporting each other, organizations supporting businesses, and locals supporting local businesses.

Weaknesses:

Limited industry transportation options and constrained access because the region is on a peninsula and road connections are limited (built capital/geographic limitations);

Insufficient living wage job and business ownership opportunities in diverse sectors;

Inadequate access to skilled workforce (individual capital); and

Insufficient broadband to support industry growth and innovation (built capital).

Opportunities:

Growing a culture of innovation around natural resource and environmental products and services, (intellectual capital) and branding the region to reflect this focus;

Value-added product innovation and development, (intellectual capital) particularly for small to mid-sized businesses, in the agriculture, forestry, fisheries, green energy, manufacturing, and other sectors;

Cultivating entrepreneurs and growing small- to medium-sized businesses in natural resource and sustainability sectors;

Piloting new and innovative business models such as employee-owned enterprises, cooperatives, and other models that enhance ownership options.

Threats:

Loss of working forests and agriculture lands through sprawl;

Climate change impacts on natural resources that affect livelihoods (such as wildfires, increase in invasive plants, diminished fish habitats, flooding, droughts and heatwaves, etc.);

A large percent of the workforce near retirement age and few younger people to replace them;

Varying opinions on active forest management for working forest lands versus preservation and conservation;

Insufficient funding through grants and low-cost long-term financing for maintaining marine infrastructure and electrifying the waterfront to support industry.

.....
"We will appreciate ports in different ways in the next decades in terms of resilience and growing economic opportunities." – Interviewee
.....

Desired Outcomes:

- A thriving and resilient working waterfront that supports and enhances the region's industry sectors while encouraging innovation and sustainable technology.
- A vibrant and sustainable commercial fishing and aquaculture sector.
- A workforce with the skills to meet the current and future needs of a sustainable maritime and seafood economy.

Strategies:

1. Invest in maintaining and upgrading port infrastructure to support the current and future needs of the blue economy, encouraging business innovation, improving energy efficiency, reducing ecological impacts and increasing resilience in the face of climate change, earthquakes, and tsunamis.
2. Partner with statewide maritime organizations and Pacific Northwest National Laboratory to promote and support innovation in the sector.
3. Provide technical assistance, access to capital and services to support maritime, fisheries, aquaculture and related businesses at all lifecycle stages from new and beginning to retirement and succession.
4. Provide workforce training to new and existing workers in the sector to meet the current and future needs of employers.

Key Partners: Ports, NODC, Northwest School of Wooden Boat Building, Northwest Maritime Center, Port Townsend Marine Trades Association, Pacific Northwest National Laboratory Marine and Coastal Research Laboratory, Peninsula College, Tribes, county Economic Development Councils, industry representatives, local government, Washington Maritime Blue, Craft3

Metrics:

- \$ invested in port infrastructure (grants, loans, reserves)
- # of maritime, fishing and aquaculture related businesses supported with technical assistance and connection to resources
- # of workers trained through workforce programs related to the maritime sector
- % of jobs that pay a wage higher than the county average
- # of multi-agency collaborations

²⁵ The Blue Economy includes a wide range of economic activities related to oceans, seas and coasts, interlinking established and emerging sectors of the ocean economy to create growth opportunities in coastal regions. The Blue Economy is a vital part of the North Olympic Peninsula's current economy, with hundreds of small and midsize businesses generating thousands of high-paying jobs and over \$400 million in direct revenue annually. The Olympic Workforce Development Consortium's 2020-24 Integrated Workforce Plan lists jobs in the maritime trades as the number one high-wage, high demand sector for both Jefferson and Clallam Counties.

AGRICULTURE & FOOD SYSTEMS

.....
"The agriculture economy is in transition from a world of medium and large farms to a few medium size and small enterprises."

"The county line should not exist in the regional food system." – Interviewee
.....

Desired Outcomes:

- The region's agricultural sector and local food economy is resilient and accessible, offering lasting livelihoods for farmers and producers, who are connected with receptive markets in the region and beyond. A strong agricultural community can also support the region during times of crisis.
- Productive agricultural lands are preserved and maintained in agriculture, making the best use of this land while allowing for more dense patterns like housing, development and infrastructure in the more urban parts of the region.
- Greater income diversification opportunities exist for producers, while wages/benefits paid in the agricultural sector are improved.
- Residents at all socio-economic levels have access to fresh, locally-produced food.
- Seamless transition of farmland and agricultural assets from one generation to the next generation of farmers.

Strategies:

1. Provide technical assistance, access to capital and services to support farmers at all stages from new and beginning to retirement and succession.
2. Create thriving local and regional markets for area farmers through "eat local" programs, support for farmers markets, value chain coordination, farm to school and farm to food bank programs.
3. Continue, expand, and ensure sustainable funding for programs such as SNAP Ed, Farm to Food Bank, and Food RX that assist low-income and elderly residents in accessing locally produced food.
4. Pursue efforts to conserve working, productive agricultural land in partnership with regional land trusts.
5. Maintain affordability and accessibility of farmland to farmers from diverse backgrounds by investigating more innovative land sharing models.
6. Explore innovative small and medium scale solutions for value-adding and meat processing infrastructure.

Key Partners: WSU Extension, NODC, Jefferson Land Trust, North Olympic Land Trust, county Conservation Districts, local government, Jefferson Landworks Collaborative, Clallam AgWorks, Washington Farmland Trust, Eat Local First, Peninsula Food Coalition, food banks, farmers markets, Craft3, farmers associations

Metrics:

- # of farms, # of acres in farmland
- # of acres of conserved agricultural land
- # of new/beginning farmers

- \$ of local food purchased by food banks, schools and institutions
- \$ value of food purchased with SNAP Ed and other programs for low-income residents
- % of farms hiring labor

FORESTRY

Desired Outcomes:

- Long-term resilience of the forest to provide habitat as well as sustainable economic opportunity.
- An increase in supply chain businesses and value-added manufacturers.
- An increase in living wage opportunities in forestry and related businesses.

Strategies:

1. Protect privately owned working forest lands from sprawl.
2. Improve the health and wildfire resistance of forests across ownership categories.
3. Incentivize forestry approaches that align economic opportunity with conservation and build resilience. (Examples might include greater diversification with cedar, growth of alder in riparian zones, practices to reduce severity of forest fires, and deploying thinning crews for faster forest growth.)
4. Support and invest in innovative product development and value-added processing to expand living wage jobs for skilled workers and particularly forestry businesses and value chains.
5. Promote development of necessary infrastructure to support value adding and sustainability such as additional kilns and equipment for biomass utilization and thermal modification.
6. Track the impact of regulations to ensure they are doing what they intend and adjust based on result.

Key Partners: Industry representatives, land trusts & community forests, NODC, county Conservation Districts, Natural Resource Conservation Service, Olympic Natural Resource Center, WSU Extension, the 10,000 Years Institute, The Nature Conservancy, Tribes, Economic Development Councils, Craft3

Metrics:

- # of initiatives that combine conservation with economic opportunity
- # acres of working forest protected from development
- Increase in infrastructure to support value added activities
- # of workers employed
- Median wage

.....
"There is going to be a huge increase in demand for electric vehicles and infrastructure... and there's a huge looming workforce shortage for people who know how to work with electric vehicles and distributed hydrogen infrastructure." – Interviewee
.....

Desired Outcome:

Building on strong natural and intellectual capital, position the region as a leader in sustainable innovation to create and expand businesses and living wage jobs.

Strategies:

1. *Leverage Energy Infrastructure Upgrades to Drive Innovation:* Invest in piloting and scaling sustainable infrastructure such as but not limited to: electric vehicle infrastructure, alternative waste disposal systems, district biomass heating systems in remote locations (such as for Tribes), community solar grids, waste to energy production.
2. *Business Development & Support:* Support, expand and incentivize sustainable industry efforts and opportunities across the region in maritime, manufacturing, agriculture, construction, forestry and other sectors, such as hybrid vessels, biomass, biochar, biofuels, hydrogen development, recycled carbon fiber products, recycled paper manufacturing, utilization of industrial waste streams for products, cross laminated timber, thermally modified hemlock, creative use of small diameter timber, etc.
3. *Workforce Development:* Grow and train the workforce to meet the needs of the green economy.

Key Partners: Pacific Northwest National Laboratory Marine and Coastal Research Laboratory, Tribes, ports, NODC, county Economic Development Councils, Peninsula College, Carbon Recycling Technology Center, State of Washington, CleanTech Association, and industry that is already involved in recycling and manufacturing, Craft3, automobile dealers/industry

Metrics:

- # of sustainable infrastructure pilots and programs
- # of businesses supported that are focused on sustainable products and services
- # of businesses created that are focused on sustainable products and services

²⁶ A green economy is defined as low carbon, resource efficient and socially inclusive. In a green economy, growth in employment and income are driven by public and private investment into such economic activities, infrastructure and assets that allow reduced carbon emissions and pollution, enhanced energy and resource efficiency, and prevention of the loss of biodiversity and ecosystem services. (United Nations)

McKinley Paper Company

McKinley Paper in Port Angeles is one of two green, state-of-the-art businesses in the US owned by McKinley Company, which is a subsidiary of Bio Pappel, the largest manufacturer of paper and paper products in Mexico and Latin America.

In 2019, McKinley Paper bought a facility from an obsolete phone book paper producer and began the process of converting the mill to a green paper and packaging company. The mill produces paper for the type of shipping boxes used by major online retailers and creates them entirely out of recycled paper products. Originally employing 24 people, the company has since grown to 160, and provides career opportunities with excellent pay and benefits, and an environment where employees are valued as team members.

McKinley Paper represents a new generation of high-tech, environmentally friendly mills that produce 100% recycled paper exclusively from recycled paper products. Their model of sustainability enables the company to extend the paper's cycle of life by collecting it and processing it to develop it again into paper and derived products. And, as implemented at their facilities in North America, they plan to co-generate green energy with steam from their operations and recycle water from their industrial processes.

In an interview, Peter Johnson, McKinley Paper Company Washington Mill Human Resource Manager, talked about the importance of McKinley Paper's identity as a green company in a place of natural beauty, and envisioned opportunities for enhancing its ecological activities, such as using a "green barge" that would provide green transportation for recycled products up and down the Pacific seaboard. This company is one of many that can elevate Port Angeles to the status of a green economy hub.



TOURISM

Desired Outcome:

The North Olympic Peninsula has a world class, sustainable tourism sector that increasingly offers better paying year-round employment opportunities, has fewer adverse impacts on the region's natural resources, and offers opportunities for small businesses.

Strategies:

1. Convene a planning group with representation from diverse tourism and recreation organizations and user groups to inventory assets (SWOT) and develop a shared tourism/recreation plan for the region, (see Recreation page 39) which feeds into county comprehensive plans.
2. Map the recreation/tourism value chain, identifying gaps/opportunities in the provision of recreation and tourism.
3. Support new businesses within the sector such as guided recreation opportunities, e-bikes, paddling, hiking, recreation gear manufacturing, etc.
4. Invest in recreation tourism infrastructure.
5. Support the coordinated marketing and promotion efforts of the Olympic Peninsula, and increase branding of the area as a recreational tourism region.

Key Partners: Olympic National Forest, Olympic National Park, Olympic Coast National Marine Sanctuary, state parks, state forests, Olympic Peninsula Visitor Bureau, local government, Chambers of Commerce, WSU Extension, NODC, county Economic Development Councils, recreation businesses, user groups, Tribes, Black Ball Ferry, Craft3, Olympic Peninsula Visitor Bureau, Olympic Peninsula Tourism Commission, county parks, lodging businesses

Metrics

- Tourism/recreation sector plan is developed
- # of new marketing/promotion efforts
- \$ invested in Infrastructure development for recreation tourism

BUSINESS GROWTH AND EXPANSION

Desired Outcomes:

- A strong enabling environment, including physical, financial and social infrastructure, supports the small business community. This is especially important for businesses of 50 employees or less to support business retention and scaling up.
- Business resilience and economic prosperity.

Strategies:

1. Map and gap business/community needs and technical assistance/service providers.
2. Ensure that technical assistance, support and access to capital are available, accessible and easy to locate for businesses at all stages of growth from start-up through retirement and succession and for businesses of all sizes, including incubators/accelerators where there is need.
3. Develop an Innovation hub to support emerging concepts in the green-blue economy and innovation pilot.

4. Increase the availability of local investment into local businesses and of innovative, flexible investment vehicles by promoting Community Development Financial Institutions, investment clubs, business plan competitions and other models.
5. Encourage alternative business ownership models such as cooperatives, ESOPs, B-Corps, community-owned enterprises, and social ventures.

Key Partners: County Economic Development Councils, Small Business Development Center (SBDC), NODC, WSU Extension, Center for Inclusive Entrepreneurship, Enterprise for Equity, Craft3, National Development Council (NDC), Business Impact NW, Washington Procurement Technical Assistance Center (PTAC), Impact WA, Department of Commerce (Scale Up Program), local government, Tribes, Chambers of Commerce, Local Investment Opportunity Network (LION), Clallam Opportunity Investment Network (COIN), Pacific Northwest National Laboratory Marine and Coastal Research Laboratory

Metrics:

- Inventory of resources completed and gaps identified
- # of business clients assisted by service providers
- Amount of capital formed and investment identified into local businesses

Quimper Mercantile

When Jefferson County's last general store closed in 2012, citizens got together with the mission of creating a new general store to make sure that household and clothing needs could be supplied locally, and that local retail dollars and retail jobs could be kept in the community.

A volunteer board of civic and business leaders started meeting in 2012 and decided to launch a startup with a unique financial base that was both broad and very local. A specific, limited class of stock was decided upon. A group of 12 founding shareholders purchased 1014 shares at \$50 per share, raising \$50,700 for startup funds. That was followed by a public offering in February of 2014. Quimper raised \$641,200 from 800 shareholders who paid \$100 per share during the public offering. The public campaign emphasized, "Are you IN?" At the end of the initial stock effort the new store raised \$691,900 from 812 shareholders, almost all of them local residents.

Today, there are about 900 shareholders who own Quimper Mercantile. The store is guided by an all-local volunteer board of directors, and they in turn take direction from the community through an annual meeting of shareholders. Quimper employs over a dozen people and has an annual payroll of over \$500,000. Its sales have grown every year and it has been profitable every year since its second year in operation. It is an active donor and civic supporter. It fills a critical role in the local economy. It fulfills its original mission: "Cultivate local prosperity; Inspire the world."



Goal 2: Opportunity and Prosperity for All

Strengths:

Exceptional skills (individual capital), including machine, construction, timber, fishing, milling, metal-working and other operational skills that can be adapted to new sectors;

Strong entrepreneur and business support (social and individual capital), and interest in models of business that encourage worker ownership.

Weaknesses:

Not enough living wage jobs, particularly for young people;

Limited career path opportunities;

An insufficient number of people in building trades and childcare;

A limited number of young and middle-aged workers;

Insufficient housing options and family amenities to attract and retain a broad range of workers; and

Limited educational opportunities (individual capital) that connect with living wage job opportunities in the region.

Opportunities:

Entrepreneurship and micro-enterprise development in a wide variety of sectors.

Explore and test social ventures and alternative business models such as ESOPs and cooperatives;

Develop internship and apprenticeship opportunities (individual capital) for young people in maritime, manufacturing, green energy, conservation, and other sectors.

Workforce development in electric vehicle infrastructure and other green economy and green infrastructure fields.

Development of housing (built capital) with a focus on environmental sustainability, use of local materials, and as a vehicle for workforce development in trades;

Create pathways for building trade careers;

New business models for childcare (intellectual capital); and

Attract and develop the childcare workforce.

Threats:

A loss of workforce and/or low quality of life for workers workers because of the cost of living, which is interrelated with a reliance on a low paid workforce in services jobs, a high level of income inequality, and insufficient housing. These factors and the lack of career opportunities for young people reinforce an imbalanced workforce largely near retirement age.

WORKFORCE & EDUCATION

Desired Outcomes:

- The region is able to attract, retain and build a workforce that is ready, available, knowledgeable, engaged, resilient, diverse, and future-oriented, with depth in a variety of sectors.
- More young people from inside and outside the Peninsula find living wage jobs/careers on the Peninsula.
- More disadvantaged people from the Peninsula find living wage jobs/careers on the Peninsula.

Strategies:

1. Facilitate a collective discussion in the region regarding workforce, cataloging all efforts currently in process and conducting a workforce/education needs assessment, separate from and in addition to the work of the Olympic Workforce Development Board.
2. Develop a plan or model to coordinate fragmented efforts into a cohesive comprehensive workforce development program, which includes marketing and awareness of workforce programs and grants/funding for training.
3. Work with local education institutions, workforce agencies and industries (maritime, green tech, forestry, agriculture, manufacturing, construction) to develop post-secondary education, applied training and other pathways for career development in sectors with high job growth for tribal and non-tribal residents.

Key Partners: City/county/state government, WorkSource, Peninsula College, Northwest School of Wooden Boat Building, Northwest Maritime Center, North Peninsula Builders Association, larger employers, school districts, trade unions/associations, Tribes, WSU Extension, high schools, Skillmation

Metrics:

- # of graduates of certificate and degree programs
- # of new certificate and degree programs to meet emerging needs
- # of applied training programs and tailored skill trainings in partnership with local industry
- # of grants or other incentives that support workforce development

MICROENTERPRISE DEVELOPMENT

Desired Outcomes:

A strong enabling environment, including physical, financial and social infrastructure, supports those interested in starting microenterprises of five or fewer employees. This can open up ownership opportunities, creating a robust pathway for individuals to get into business.

Strategies:

1. Convene, map and gap the current offerings of business support organizations in order to ensure that services are available to meet the specific needs of microbusinesses.
2. Ensure availability of expert coaching and mentoring from those who understand the nuances of microbusiness challenges and opportunities.
3. Increase the availability of local investment vehicles and flexible capital aligned to the needs of microenterprises.

Key Partners: Center for Inclusive Entrepreneurship, Enterprise for Equity, Small Business Development Center (SBDC), NODC, National Development Council (NDC), Business Impact NW, Craft3, local government, Tribes, Local Investment Opportunity Network (LION), Clallam Opportunity Investment Network (COIN)

Metrics:

- Inventory of resources completed and gaps identified
- # of microenterprise business clients assisted
- Amount of capital formed and investment identified into new microenterprise businesses

CHILDCARE

Desired Outcome:

Affordable access to a variety of quality childcare options for all families who need it.

Strategies:

1. Promote creative ownership and business models such as co-op-based childcare, and provide support to a variety of childcare business types to increase capacity, meet regulatory requirements, and access resources.
2. Attract and train the childcare workforce.

Key Partners: OlyCAP, First Step for Families, childcare agencies (YMCA, Boys & Girls Club), William Shore Memorial Pool, local government, Tribes, Jefferson Healthcare, Peninsula College, Northwest Cooperative Development Center, Center for Inclusive Entrepreneurship, county Economic Development Councils

Metrics:

- Increase in available childcare options
- # of people trained in childcare provision
- # of families served by childcare

HOUSING

Desired Outcomes:

- There is sufficient high quality, affordable, workforce and market rate housing for all who need it.
- Housing options include innovative models for creating quality housing that is compact, energy efficient, and sustainable.
- The region's housing availability is supported by adequate infrastructure (water, wastewater, financing, etc.) and affordable utilities.

Strategies:

1. Inventory buildable land and lots in each jurisdiction in the region, assessing access to infrastructure, transit and other factors in order to identify those most suitable for housing, including multifamily development.

2. Define the issues contributing to gaps in housing across the region and explore housing solutions using zoning, regulation and taxes.
3. Encourage the incorporation of density strategies into the upcoming City and County Community Plan updates (for all growth managed communities).
4. Build the capacity and support needed for the nonprofit sector to engage in housing development using the full range of state, federal and private funding and innovative development models.
5. Build the capacity of families through education/strategies on home buying and budgeting to ensure families have the tools to successfully stay in their home by building family wealth.

Key Partners: Local government, Tribes, Peninsula Housing Authority, OlyCAP, Bayside Housing Services, Habitat for Humanity, Olympic Housing Trust, Sarge's Place, Serenity House, Dove House, Peninsula Behavioral Health, county Economic Development Councils, North Peninsula Builders Association, Housing Solutions Network, State of Washington, private sector builders

Metrics:

- # of new housing units developed
- # of new affordable and workforce units developed
- # of new multi-family housing developed

Goal 3: Strengthened and Sustainable Infrastructure

.....
"We've failed to address our backlog of historic infrastructure maintenance for too long. We need to rejuvenate and future-proof infrastructure." – Interviewee
.....

Strengths:

Strong social networks and community organizations; capable transportation agencies and organizations that work together to use minimal resources to maximum effect (social capital).

Olympic Discovery Trail (built capital), a premier non-motorized touring trail that supports tourism, alternative transportation, and community health.

Weaknesses:

Deteriorating public infrastructure (built capital);

Insufficient housing (built capital);

Insufficient affordable broadband (built capital);

Limited and underutilized bike and public transit options (built capital);

Dependence on the state to properly maintain roads and bridges;

Inability of sewer and water system infrastructure to support housing densification (built capital);

Energy infrastructure and power requirements along with pricing are not competitive for industry (built capital); and

Insufficient childcare options (human/intellectual/financial capital).

Opportunities:

A focus on green infrastructure such as electric vehicle infrastructure, with unprecedented funding at state and federal levels for electric vehicle and other zero-emissions vehicle investments (built capital).

Better integration of local and regional plans.

Threats:

Effects of natural disasters and climate change on already fragile infrastructure;

Limited availability of funding for expensive rural infrastructure that has a low-density utilization rate;

Insufficient tax base to support investments that would attract multi-family housing developers;

Political polarization;

Lack of understanding, policies, and funding at federal and state levels in response to what is needed in rural communities; and

Capacity threats exist, in that it is challenging to find the organization(s) that are equipped to take the lead on some of these strategies, and there is currently limited collaboration and funding across silos.

WATER / WASTE WATER / STORM WATER

Desired Outcome:

Resilient, efficient, and affordable safe water, wastewater and stormwater services that support sustainable growth and are equipped for climate change.

Strategies:

1. Coordinate as a region to access funding, such as working with the legislature to increase the availability of funding, or pooling resources for a shared grant writer, and to invest limited resources strategically.
2. Invest in maintenance, repair, and expansion to meet basic needs and increase resilience to climate change and natural disasters.
3. Invest in increased infrastructure capacity to densify larger communities to prevent sprawl and accommodate a growing population while supporting rural areas with more remote, localized systems.

Key Partners: Local government, county Economic Development Councils, NODC, Department of Ecology, Public Works Trust Fund

Metrics:

- \$ grant funding
- \$ low-cost long-term financing
- \$ invested in infrastructure and green infrastructure
- # of projects completed and # served by those projects

BROADBAND

Desired Outcomes:

- *Quality & Accessibility:* Connectivity that meets or exceeds Washington State's broadband goals²⁷ available to all businesses, institutions and residences in the region.
- *Accessibility and Affordability for All:* Every household that wants a broadband connection can afford one.
- Focus and investment in "last mile" connections increases access to hard-to-reach locations.

Strategies:

1. Expand local engagement in broadband development through Broadband Action Teams in each county to define project areas that would be good candidates for grants.
2. Support innovation and development of expertise related to broadband.
3. Improve access to broadband in hard-to-serve areas, such as remote tribal and non-tribal areas with poor access, by seeking funding for public and public-private partnerships for middle mile and last mile projects.
4. Support efforts to provide equitable access by monitoring affordability of access and encouraging internet service providers to participate in programs that subsidize costs for low-income households.
5. Consider forming a broadband authority to coordinate across local government jurisdiction.

²⁷ In 2019 the legislature passed the Second Substitute Senate Bill 5511 which included the following goals: By 2024: 25/3 Mbps scalable; By 2026: 1/1 Gbps all anchor institutions; and By 2028: 150/150 Mbps all citizens and businesses.

Key Partners: Local government, Public Utility Districts, Broadband Action Teams, NODC, Internet Service Providers, State Broadband office, Economic Development Councils, ports, Tribes

Metrics:

- Connectivity meets or exceeds WA State broadband goals
- # stakeholders involved in action teams
- # of new fiber-to-the-home connections
- % of households with available broadband services
- % of households accessing broadband services
- \$ grant funding and \$ low-cost long-term financing
- \$ invested in infrastructure

TRANSPORTATION

.....
"Collaboration between transit agencies, Clallam Transit and Jefferson Transit, helps make the transportation system more resilient than it might be otherwise." – Interviewee
.....

Desired Outcome:

A resilient and reliable multi-modal transportation system that supports and efficiently connects residents, workers, tourists, and businesses within and outside the region.

Strategies:

1. Sufficient investment in maintenance and improvement of highway and road system for greater resilience.
2. Improve and expand public transit options to ensure the workforce can access jobs and all people can access basic necessities and other destinations.
3. Expand development of clean energy and electric vehicle infrastructure.
4. Increase the use of non-motorized transportation through development of more walkable and bikeable communities (including completion of the Olympic Discovery Trail – see the Natural Environment/Recreation section page 39).
5. Optimal use of marine and air options to enhance transportation effectiveness and resilience.
6. Emergency planning related to transportation, to build in redundancy and prepare for climate change and disasters.

Key Partners: Peninsula Regional Transportation Planning Organization (PRTPO), Jefferson and Clallam Transit, WSDOT, local government, automobile dealers/industry

Metrics:

- \$ invested in new infrastructure
- Increase in transit options
- # of electric vehicle charging stations
- Miles of trail development
- Investments in walkable and bikeable infrastructure

ENERGY

Desired Outcomes:

1. Energy systems meet clean energy goals while supporting multiple community and industry needs of affordability, competitiveness, reliability, resilience to events (storms, fire, earthquake), adequacy (e.g., for EV charging), and accessibility for remote and vulnerable populations.
2. Energy resources are diversified through sustainable energy development and innovation.

Strategies:

1. Develop a community-centered energy needs assessment linked with other strategies to ensure it supports goals of transportation, housing, maritime, CleanTech innovation, etc.
2. Ensure that more distant communities, such as some of the region's Tribes, have consistent, reliable energy, and that power outages are addressed in a timely fashion.
3. Engage technical assistance in developing options for meeting energy needs, particularly of high single-use operations.
4. Leverage state and federal funding to 1) upgrade and expand energy systems, and 2) develop and support a local workforce to build, maintain, and repair these systems.
5. EDCs and Chambers work with energy providers to explore ideas to strengthen their business expansion and retention approach.
6. Promote development of clean energy production and cost competitiveness to become a comparative advantage for the region, including partnering on pilot programs to test alternative approaches.

Key Partners: Pacific Northwest National Laboratory Marine and Coastal Research Laboratory, Public Utility Districts, Port Townsend Paper, McKinley Paper, ports, local businesses, Tribes, manufacturing industry, emergency management planners, Bonneville Power Administration, State of Washington, energy workforce programs, Economic Development Councils, Chambers of Commerce

Metrics:

- \$ of external dollars invested in energy infrastructure
- # of pilot projects
- Increase in renewable energy portfolio

Goal 4: Protected and Enhanced Cultural and Natural Assets

Strengths:

Natural beauty (natural capital), including the Olympic National Park, that supports quality of life as well as the tourism industry;

The Olympic Discovery Trail (built capital) supports mobility and sustainable transportation, while also offering tourism and recreational opportunities;

Strong support for a place-based economy (cultural capital) with a commitment to growing and sustaining local businesses and local markets;

Limited impact of climate change (natural capital), since the region is predicted to be less affected by climate change than most;

Conservation organizations (social, political capital), such as regional and local land trusts and conservation focused nonprofits, that are leaders in environmental protection and restoration;

A unique artisan culture (cultural and individual capital) underpinned by the Northwest School of Wooden Boat Building and the Port Townsend School of Woodworking.

Weaknesses:

Limited educational, internship and job opportunities (individual capital) in the conservation sector;

Challenges valuing natural resources (natural capital) in a way that supports conservation activities.

Opportunities:

Building on the presence of the Olympic National Park and Olympic Discovery Trail: Small communities around those assets can leverage their proximity to help realize aspirations related to transportation, infrastructure, and business opportunity;

Economic opportunities related to conservation, including carbon sequestration, and jobs and internships in conservation;

Economic opportunities related to arts and culture, and building thriving downtowns.

Threats:

Negative impact and loss of natural environments due to unmanaged growth, tourism, and recreation activity;

Climate change impacts on natural environments (marine, fresh water, forest, agriculture, and park land);

Climate immigration that increases rate of growth.

NATURAL ENVIRONMENT

.....
"Everything is connected." – Workshop participant
.....

.....
"Preserving the natural environment is the economic long game." – Workshop Participant
.....

.....
"I think our economic future hinges on how to steward those resources so they can provide value indefinitely." – Interviewee
.....

Conservation

Desired Outcome:

The region maintains a healthy and sustainable ecosystem, offering equitable access to nature and sustained natural resource-based livelihoods.

Strategies:

1. Preserve agricultural and forest land from development.
2. Educational opportunities, internships, certifications, and training in restoration and conservation, particularly for youth.
3. Explore and support incentives for resilient management of working forests/ocean/ag land, such as carbon credits, ecosystem service valuation, etc.

Key Partners: Land trusts, Tribes, local government, county Conservation Districts, National Park, National Forest Service, Department of Natural Resources, timber industry and other natural resource businesses, land owners, WSU Extension

Metrics:

- # of people who have been trained, have internships, or have received education in restoration and conservation
- # of new programs in restoration and conservation
- # of acres of agricultural and forest land preserved/conserved.

Recreation

Desired Outcomes:

1. The region is home to a wide variety of outdoor recreation opportunities, built on the region's natural assets, that are accessible to both residents and visitors.
2. The quality of outdoor recreation spaces is maintained and impacts from use are reduced. New infrastructure ensures this happens.

Strategies:

1. Convene a planning group with representation from diverse recreation organizations and user groups to inventory assets (SWOT) and develop a shared plan for the region, (see Tourism page 28) which feeds into county comprehensive plans.
2. Map the recreation/tourism value chain, identifying gaps/opportunities in the provision of recreation.

3. Support new businesses within the sector such as guided recreation opportunities, e-bikes, paddling, hiking, recreation gear manufacturing, etc.
4. Support the development of coordinated marketing and promotion efforts to brand the Olympic Peninsula as a recreational tourism region.
5. Complete the Olympic Discovery Trail.

Key Partners: Local government, Tribes, county Conservation Districts, National Park, National Forest Service, Department of Natural Resources, WSU Extension, Black Ball Ferry, tourism businesses, cyclists, Olympic Peninsula Visitor Bureau, the Olympic Peninsula Tourism Commission, state parks and county parks

Metrics:

- Recreation sector plan is developed
- # of new marketing/promotion efforts
- \$ invested in Infrastructure development for recreation tourism
- # of miles and # of continuous miles of Olympic Discovery Trail completed
- % of Olympic Discovery Trail completed

PLACEMAKING

"Placemaking inspires people to collectively reimagine and reinvent public spaces as the heart of every community. Strengthening the connection between people and the places they share, placemaking refers to a collaborative process by which we can shape our public realm in order to maximize shared value. More than just promoting better urban design, placemaking facilitates creative patterns of use, paying particular attention to the physical, cultural, and social identities that define a place and support its ongoing evolution."²⁸

Desired Outcomes:

- The region is home to a year-round creative economy, with living wage jobs, vibrant and welcoming downtowns and a support ecosystem that recognizes the importance of arts and culture to the economy.
- The region maintains and builds upon the character and distinct identity that people love including environmental, historical and native heritage – saving those things in danger of being lost – trades, arts, history.
- The culture, history and values of area Tribes are recognized and celebrated throughout the region, with the Tribes controlling how their stories are told.

Strategies:

1. Encourage collaboration among arts and culture organizations, possibly including regional branding and discussion of ways to make city/county codes more open to placemaking.
2. Technical assistance, support and access to capital are available and accessible for art and artisan businesses, including those in the creative arts and connected to Tribes.
3. Downtown districts and Main Street organizations develop plans for creating thriving

²⁸ "What Is Placemaking?" Project for Public Spaces, 2007, <https://www.pps.org/article/what-is-placemaking>

downtowns that welcome and celebrate diverse voices and make creative use of vacant spaces. Leverage the Port Townsend designation of a creative district to encourage more of this.

4. Take advantage of the new Maritime Washington National Heritage Area to promote maritime tourism on the region's working waterfronts. (Northwest School of Wooden Boatbuilding)
5. Marketing to highlight artisan culture and related learning opportunities on the North Olympic Peninsula.

Key Partners: Arts/culture organizations, county Economic Development Councils, WSU Extension, Tribes, schools, colleges, local government, Main Street organizations, downtown organizations, business associations, Chambers of Commerce, community foundations, creative districts, historical societies, museums, Racial Justice Collective, Northwest School of Wooden Boatbuilding, Northwest Maritime Center

Metrics:

- Arts/cultural collaboration
- Amount of technical assistance, support and capital available to arts/artisan businesses
- # of North Olympic Peninsula cultural resources shown on the Washington Trust Maritime Mapper

Evaluation Framework

In addition to the metrics listed under each section above, this evaluation framework can guide the overall approach to evaluation for the CEDS. The region is attempting to achieve a variety of outcomes under the umbrella of economic development. It is based on measuring impacts on the eight forms of community capital. This lens will help the region to better understand the capitals it is building.

| Capital | Metrics |
|--|---|
| Individual – Health, well-being and skills of the population. | # of people completing certificate and degree programs |
| Intellectual – Knowledge, creativity and innovativeness of the region. | # of new certificate programs related to key sectors |
| Social – Trust, relationships and networks between people and organizations. | # of partners engaged in the region's economic strategies |
| Financial – Cash and financial investments. | Median household income |
| Built – Physical and information infrastructure such as buildings, roads, telecommunications. | % of the population served by broadband |
| Natural – Natural resources such as land, plants, animals, water and air. | # of acres in conservation |
| Political – Connections and influence of individuals and organizations. | New policies related to CEDS strategies Engagement of local governments in the Economic Development District |
| Cultural – Values, traditions and identity | # of cultural events/festivals |

Appendices

Appendix A: Strategy Committee Members

| | |
|-------------------------|---|
| John Mauro | City of Port Townsend |
| Betsy Davis | NW School of Wooden Boat Building |
| Pete Langley | Port Townsend Foundry and Port Townsend Marine Trades Association |
| Colleen McAleer | Clallam EDC and Port of Port Angeles |
| Joe Allen | Jamestown S'Klallam Tribe |
| Eron Burg | Port of Port Townsend |
| Allyson Brekke | City of Port Angeles |
| Danny Steiger | Lumber Traders |
| Crystie Kisler | Finnriver Farm & Cidery |
| Anji Scalf | Sequim Dungeness Valley Chamber of Commerce |
| Andra Smith | Sequim Food Bank |
| Cliff Moore | WSU Jefferson County Extension |
| Ben Bauermeister | EDC Team Jefferson |
| Brandino Gibson | Worksource |
| Jim Haguewood | Port Angeles Realty |

Appendix B: NODC Board and Staff

NODC BOARD

Mark Ozias
Clallam County
President

Kate Dean
Jefferson County
Vice President

Brian Kuh
EDC Team Jefferson
Treasurer

Navarra Carr
City of Port Angeles
Secretary

Karen Goschen
Port of Port Angeles

Erika Lindholm
Craft3

Bill Putney
Port of Port Townsend

Jeff Randall
Jefferson PUD

Clea Rome
WSU Clallam County Extension

NODC STAFF

Karen Affeld
Executive Director

Susan Shoemaker
Business Assistance Specialist

Amy Nash
Administration and Communications Coordinator

Cindy Brooks
Economic Recovery Coordinator

Mark Bowman
Sustainable Agriculture Coordinator

Appendix C: NODC Members

10,000 Years Institute

Center for Inclusive Entrepreneurship

City of Forks

City of Port Angeles

City of Port Townsend

City of Sequim

Clallam County

Clallam County EDC

Clallam County PUD

Clallam Transit

Craft3

Dungeness Valley Creamery

EDC Team Jefferson

Jamestown S’Klallam Tribe

Jefferson Community Foundation

Jefferson County

Jefferson County PUD

Jefferson Land Trust

North Olympic Land Trust

Northwest School of Wooden Boatbuilding

Port of Port Angeles

Port of Port Townsend

Port Townsend Food Co-op

Port Townsend Foundry

Sequim Dungeness Valley Chamber of Commerce

WSU Clallam County Extension

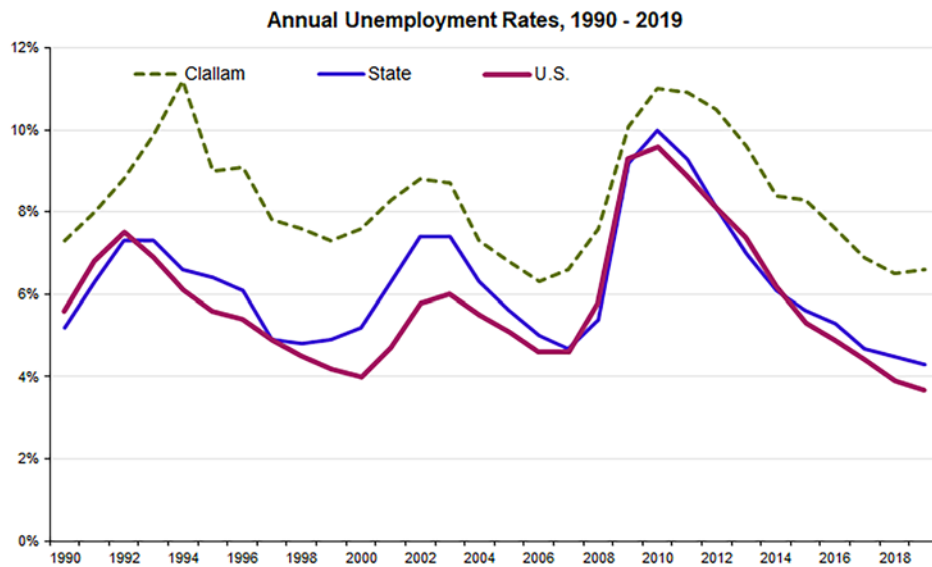
WSU Jefferson County Extension

Appendix D: Data Charts & Graphs

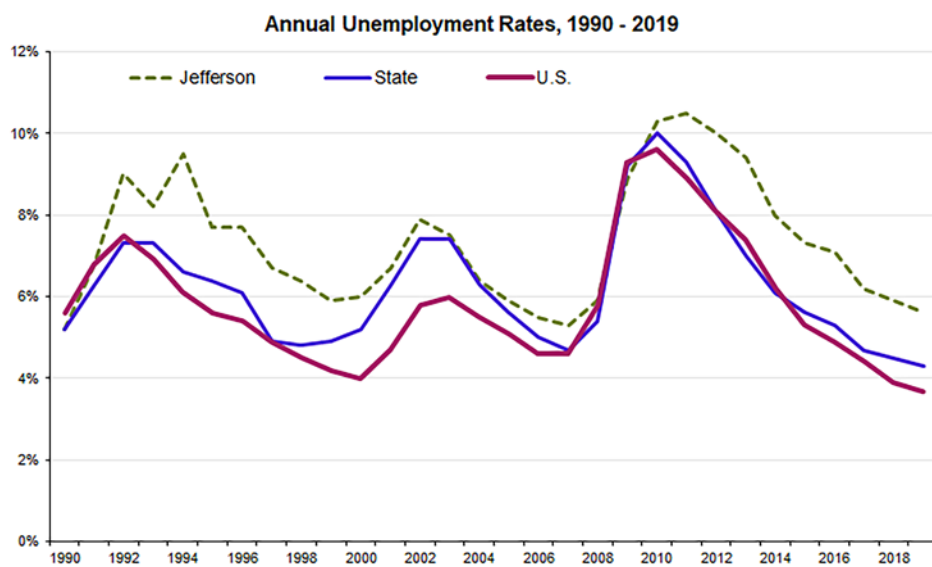
Annual Unemployment Rates (1990-2019)²⁹

Unemployment in the region has generally been higher than state and national rates.

Clallam County



Jefferson County



²⁹ Washington State Employment Security Department County Data Tables (<https://esd.wa.gov/labormarketinfo/report-library>)

Appendix E: North Olympic Peninsula Economic Recovery and Resilience Planning Survey Questions

Strengths (Assets)

What are the greatest assets and characteristics of the North Olympic Peninsula?

- Sense of community pride
- Small town and rural feel
- Strong social networks
- Sense of independence and self-determination of residents
- Community groups/organizations: churches, service, nonprofits, etc.
- The opportunity to live close to nature
- World class recreation opportunities
- Olympic National Park
- Agricultural focus of the region
- Forestry focus of the region
- Maritime focus of the region
- Post-secondary educational opportunities (colleges and trade schools) in the region
- Healthcare facilities
- Public transit
- Bike transit
- The cultural diversity of the region
- Existing level of law enforcement and public safety
- The cost of living
- Arts and cultural opportunities
- Strong small business community
- Buy local movement
- Thriving downtowns
- Festivals and events
- Other

Weaknesses

What do you think most needs to be changed or improved in the North Olympic Peninsula region?

- Housing availability and affordability
- Childcare availability
- Infrastructure – sewer and water
- Infrastructure – roads

- Infrastructure – schools
- Green infrastructure (electric vehicle charging stations, renewable energy, energy efficiency, waste management)
- Public transit (bus, ferry) and bike transit
- Commercial space and property improvement
- Access to capital
- Broadband services
- Educational opportunities
- Poverty and food security
- Homelessness
- Addressing substance abuse
- Greater resiliency to natural disasters
- Career pathway opportunities
- Work opportunities for young people
- Availability of living wage jobs
- High dependency on Medicare/Medicaid
- Geographic isolation
- Lack of inclusivity
- Equitable economic opportunities
- Dominance of commodity goods (vs. value added products)
- Other

Opportunities

Based on these assets, what do you see as the most promising opportunities in the region?

- Recreation tourism
- Agriculture and food processing development
- Forestry sector development
- Maritime sector development
- Manufacturing
- Value added product development
- Real estate property development
- Attracting remote workers
- Industry diversity and supply chains
- Regional workforce development (including apprenticeships, internships, work-based learning, and succession planning)
- Housing policy and development (such as affordable housing, senior housing, workforce housing, upgrades to existing housing, etc.)

- Encouraging young people to stay in the region
- Investing in family-friendly communities and amenities
- Cultivating entrepreneurs and small businesses
- Community involvement in investing and mentorship
- Development of green technologies
- Development of blue (maritime) technologies
- Other

Threats

What do you see as potential threats to the long-term resilience of the regional economy?

(Community resilience is the sustained ability of communities to withstand adversity, adapt to change, and evolve new systems in the face of change.)

- Non-climate change related natural disasters (earthquakes, tsunamis)
- Climate change related natural disasters (drought and reduced water flow, forest fires, increasing storm severity)
- Lack of broadband access
- Aging demographics
- Loss of workforce to nearby urban areas
- Growth of outside online retail
- Regulatory mandates
- Federal and state budget limitations
- Another recession
- Loss of major employers
- Marine transportation dependence on fossil fuels
- Disruption of ferry and bridge access
- Timber industry restrictions
- Lack of affordable housing/housing stock
- Water quality mandates
- Urban flight to rural because of affordability
- Non-predictability of state and federal funding opportunities
- Political division
- Acidification effects on shellfish industry
- Other

Appendix F: Links to other economic development reports

NODC CEDS

<https://www.noprce.org/Clallam-and-Jefferson-Counties-Comprehensive-Economic-Development-Strategy>

Clallam County Comprehensive Plan – Economic Development

<http://www.codepublishing.com/WA/ClallamCounty/html/ClallamCounty31/ClallamCounty3102.html#31.02.610>

City of Forks 2016-2035 Comprehensive Plan

<https://forkswashington.org/wp-content/uploads/2019/09/2019-2039-Forks-Comprehensive-Plan-FINALv2.1a.pdf>

City of Port Angeles Comprehensive Plan 2016

<https://www.cityofpa.us/937/Comprehensive-Plan>

Port of Port Angeles Waterfront ODT Plan, Housing Plan, Financial Plan

<https://www.cityofpa.us/145/Current-Projects-and-Plans>

Port of Port Angeles Comprehensive Scheme of Harbor Improvements

<http://www.portofpa.com/DocumentCenter/View/429>

Port of Port Angeles 2015 – 2020 Strategic Plan

<http://www.portofpa.com/DocumentCenter/View/553>

<https://www.cityofpa.us/DocumentCenter/View/10013/Strategic-Plan-Graphic-2021-2022>

Port of Port Angeles Analysis of the Wild Olympics Economic Impacts & Opportunities

<https://www.portofpa.com/DocumentCenter/View/20/Analysis-of-the-Wild-Olympics?bidId=>

City of Sequim 2016 Tourism Marketing Plan

<http://wa-sequim.civicplus.com/DocumentCenter/View/7948>

City of Sequim 2017 – 2022 Capital Improvement Plan

<http://www.sequimwa.gov/DocumentCenter/View/8397>

Jefferson County Comprehensive Plan – Economic Development

<https://www.co.jefferson.wa.us/578/Jefferson-County-Comprehensive-Plan>

City of Port Townsend Howard Street Corridor Economic Feasibility Study

<https://static1.squarespace.com/static/5674414c9cadb6ac8da46f0b/t/57e0628a29687f1cc763f2cf/1474323127386/Feasibility+Study+%28Final+1-30-15%29.pdf>

City of Port Townsend Draft 2016 Comprehensive Plan Update – Economic Development

<http://weblink.cityofpt.us/weblink/0/edoc/111389/2016%20GMA%20Periodic%20Update%20%20-%20Were%20All%20In%20This%20Together.pdf>

Port of Port Townsend Strategic Plan

<https://www.portofpt.com/wp-content/uploads/StratPlanAdopted3.24.10.pdf>

Other Port Townsend plans

<https://portofpt.com/planning/>

Marine Trades of Jefferson County Economic Impact Study

<http://ptmta.org/wp/economic-impact>

Washington State Maritime Sector Economic Impact Study

https://www.maritimefederation.com/uploads/2/9/9/6/29962189/cai.wmf.maritime_cluster_study_2017_update.2017_0413.pdf

Port Angeles Chamber of Commerce ELEVATE PA 2026 Kickoff Survey

<https://chambermaster.blob.core.windows.net/userfiles/UserFiles/chambers/886/CMS/VISIONING-WORKSHOP-ANNOUNCEMENT.pdf>

Jamestown S’Klallam Tribe

https://jamestowntribe.org/wp-content/uploads/2018/05/Comprehensive_Plan_Revised_in_2016_Final.pdf

The Economic Impact of Jefferson County Marine Trades – 2018

<http://ptmta.org/wp/wp-content/uploads/2018/05/2018-Jefferson-County-Marine-Trades-Impact-Report.pdf>