

Monday, February 3, 2025

College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)

5:00 PM

In-Person at College Place City Hall, 625 S College Avenue, College Place Washington

Meeting may be viewed at: Live Stream on City of College Place, Washington YouTube at https://www.youtube.com/channel/UCbx3qrqzLDL_05NusReSI-g/featured

Zoom Attendee Link: <https://us06web.zoom.us/j/88987702433>

Or you may call this number to listen: 1-669-900-9128 ID#889 8770 2433

Phone controls: *6 - toggle mute/un-mute and *9 - raise hand

1. Opening Items

Subject :	1.01 Call To Order
Meeting :	Feb 3, 2025 - College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)
Category :	1. Opening Items
Type :	Procedural
Subject :	1.02 Roll Call
Meeting :	Feb 3, 2025 - College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)
Category :	1. Opening Items
Type :	Information

Public Content

Voting Members

Position 1 - Tracy Warner - term expires 12/31/2026

Position 2 - Kelli Leen - term expires 12/31/2028

Position 3 - Doug Case - term expires 12/31/2026 - Vice Chair

Position 4 - Teri Lesmeister -term expires 12/31/2028

Position 5 - Allison Peck - term expires 12/31/2026 - Chair

Position 6 - Kirk Amick - term ends 12/31/2028

Ex-Officio - Arlene Alen - WW Valley Chamber of Commerce Representative

Advisory Members

Mike Rizzitiello - City Administrator

Brian Carleton - Finance Director

Maryelizabeth E. Garcia - City Clerk

Subject : 1.03 Public Comment
Meeting : Feb 3, 2025 - College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)
Category : 1. Opening Items
Type : Procedural

Public Content

Commission meetings are primarily structured to permit Membersto arrive at the decisions necessary to make recommendations to the City Council.

Meeting Protocol for Public Comment:

When submitting public comments, include the following information regardless of the manner you are using: Note that there are deadlines for writtencomments to be included in the meeting documents.

- Your Name
- Your Address

WrittenPublic comments may be provided by submitting comment to Clerk@cpwa.usno later than 4:30PMon the meeting date to be included in the record.(If typewritten, no less than 11 pt font).

VerbalPublic Comments may be made during the meeting:

- In-person at the meeting location - provided at the beginning of each agenda.
- Telephone comment - Call1-669-900-9128, entering the meeting ID (provided at beginning of agenda) and raise your hand (*9 to raise hand, *6 to mute/un-mute) when comments are requested.
- Virtual comment -Join using theZoom Attendee link (provided at beginning of agenda) and raise your hand when comments are requested.

Once recognized, you will have five minutes to speak on any subject that is under the control of the Commission.

2. Consent Agenda

Subject : 2.01 Approve Agenda for February 3, 2025.
Meeting : Feb 3, 2025 - College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)
Category : 2. Consent Agenda
Type : Action (Consent)

Consent

Our adopted rules of Parliamentary Procedure, The Standard Code of Parliamentary Procedure by Alice Sturgis, 4th Edition, provide for a consent agenda listing several items for approval of the Board by a single motion. Most of the items listed under the consent agenda have gone through Board subcommittee review and recommendation. Documentation concerning these items has been provided to all board members and the public in advance to assure an extensive and thorough review. Items may be removed from the consent agenda at the request of any board member.

Subject : 2.02 Approve Minutes from January 6, 2025.
Meeting : Feb 3, 2025 - College Place Economic Development,

Tourism, and Events Commission- - Hybrid (In-Person & Electronic)

Category :

2. Consent Agenda

Type :

Action (Consent)

File Attachments

[2025-1-6 EDTEC Minutes.pdf \(707 KB\)](#)

Consent

Our adopted rules of Parliamentary Procedure, The Standard Code of Parliamentary Procedure by Alice Sturgis, 4th Edition, provide for a consent agenda listing several items for approval of the Board by a single motion. Most of the items listed under the consent agenda have gone through Board subcommittee review and recommendation. Documentation concerning these items has been provided to all board members and the public in advance to assure an extensive and thorough review. Items may be removed from the consent agenda at the request of any board member.

Subject :

2.03 Approve Consent Agenda - Our adopted rules of Parliamentary Procedure, The Standard Code of Parliamentary Procedure, provide for a consent agenda listing items for approval of the Commission by a single motion. Typically the items listed under the consent agenda are the minutes from previous meetings and the agenda for the current meeting. Documentation concerning these items has been provided to all Commission Members and the public in advance to assure an extensive and thorough review. Items may be removed from the consent agenda at the request of any Commission Member.

Meeting :

Feb 3, 2025 - College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)

Category :

2. Consent Agenda

Type :

Action (Consent)

Recommended Action :

Motion to approve the consent agenda

Consent

Our adopted rules of Parliamentary Procedure, The Standard Code of Parliamentary Procedure by Alice Sturgis, 4th Edition, provide for a consent agenda listing several items for approval of the Board by a single motion. Most of the items listed under the consent agenda have gone through Board subcommittee review and recommendation. Documentation concerning these items has been provided to all board members and the public in advance to assure an extensive and thorough review. Items may be removed from the consent agenda at the request of any board member.

3. Guest Presentations

Subject :

3.01 Martin Airfield Area Planning Study - Mr. Ben Hoppe (JUB Engineers)

Meeting :

Feb 3, 2025 - College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)

Category :	3. Guest Presentations
Type :	Discussion, Information

Public Content

Historical Perspective:

The City obtained a State Community Economic Revitalization Board grant for \$100,000 to conduct a site development plan for around the Martin Airfield area back in January 2024.

Information for Consideration:

Mr. Ben Hoppe of J-U-B Engineers will provide an update as to activities surrounding the development of the plan.

File Attachments

[MartinAirfield_EDTEC_Feb3.pptx \(6.185 KB\)](#)

Subject :	3.02 Comprehensive Economic Development Strategy (CEDS) Update - Mr. Saldana
Meeting :	Feb 3, 2025 - College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)
Category :	3. Guest Presentations
Type :	Discussion, Information

Public Content

Historical Perspective:

The City obtained a \$40,000 Federal Economic Development Administration Planning Grant to complete a Comprehensive Economic Development Strategy (CEDS) for the City. This will double as the Economic Development element for the forthcoming Comprehensive Plan Update.

Information for Consideration:

The City issued a RSQ and put it out via MRSC Small Works Roster Vendor Directory. We received four responses. It was graded that Economic Growth Strategies was the most responsive bidder. This plan is needed so we can qualify for Federal Economic Development Administration funding.

File Attachments

[CEDS College Place PDF.pdf \(429 KB\)](#)
[College Place Background Report \(Draft\)_v4.pdf \(1.055 KB\)](#)
[CEDS College Place PPT Feb.pptx \(668 KB\)](#)

Subject :	3.03 FY 2025 to 2035 Strategic Plan - Mr. Rizzitiello
Meeting :	Feb 3, 2025 - College Place Economic Development,

Tourism, and Events Commission- - Hybrid (In-Person & Electronic)

Category :

3. Guest Presentations

Type :

Information

Public Content

Historical Perspective:

The last Strategic Plan dates back to 2017.

Information for Consideration:

The City worked with Sageland Strategic (Zach Ratkai) to develop a ten year strategic plan for the community.

File Attachments

[CPWA Strategic Plan.pdf \(14,304 KB\)](#)

4. Action Agenda

5. Staff Reports

Subject :	5.01 2025 Movies in the Park & Other Community Events - Ms. Garcia
Meeting :	Feb 3, 2025 - College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)
Category :	5. Staff Reports
Type :	Discussion, Information

Public Content

Historical Perspective:

In Summer 2018 the City of College Place successfully obtained a grant from the Pacific Power Foundation to purchase an inflatable sixteen foot outdoor movie theater. This outdoor movie screen started Movies in the Park as a fun family friendly get together event.

Information for Consideration:

This year, we will continue the tradition of having free kettle corn to the first 100 movie attendees and use the inflatable outdoor movie theater. We are moving the event to be held in our newly-renovated Lions Park.

The projected dates and movie showings are as follows:

6/21: Fern Gully

7/12: Top Gun Maverick

8/2: Wicked

8/23: E.T.

9/13: Coco

Sponsorships

If you would like to get involved in sponsoring City events, there are several different sponsorship opportunities available from sponsoring a Movies in the Park movie to a day activity at the College Place Farmers Market. For more information and the 2025 sponsorship brochure, please visit: https://www.cpwa.us/residents/events/sponsorship_packages.php.

File Attachments

[24-082_RESOLUTION_-_2025_Community_Events.pdf \(331 KB\)](#)

Subject :	5.02 Downtown Association Formation Update- Ms. Garcia
Meeting :	Feb 3, 2025 - College Place Economic Development, Tourism, and Events Commission- - Hybrid (In-Person & Electronic)
Category :	5. Staff Reports
Type :	Discussion, Information

Public Content

Historical Perspective:

The downtown group has been meeting biweekly and has now met 5 times since the first meeting in November.

Information for Consideration:

At the meeting on 1/22/2025, the group had their first official Board Meeting, agreed on a name, elected Officers, adopted bylaws, approved Articles of Incorporation, adopted an official logo, and an organizational structure. See attachments for further information.

Name: Downtown College Place Association

Officers:

- President: Chloe Congleton, Enable Art
- Vice President: Jim Fry, CPPS
- Secretary: Maryelizabeth, City of College Place
 - Treasurer: David Lopez, WWU
- Board Members At Large: Vicki Zanes, Andy's Market; DeLona Bell, CMBell Company

File Attachments

[DCPA Board Meeting 1.22.25.docx \(22 KB\)](#)
[DCPA Board Meeting Agenda 2.5.25.docx \(21 KB\)](#)
[Downtown College Place Association Bylaws.docx \(20 KB\)](#)
[DTCPE.logo.color.png \(155 KB\)](#)
[DTCPE.logo.black.jpg \(244 KB\)](#)
[DCPA Organizational Chart.png \(86 KB\)](#)
[DCPA Board Membership Application Fillable.pdf \(593 KB\)](#)

Subject : 5.03 Development Activity: February 2025 - Mr. Rizzitiello
Meeting : Feb 3, 2025 - College Place Economic Development,
Tourism, and Events Commission- - Hybrid (In-Person &
Electronic)
Category : 5. Staff Reports
Type : Discussion, Information

Public Content

Historical Perspective:

Information for Consideration:

Development activity for February 2025.

File Attachments

[DevelopmentTrackSheet_February2025.pdf \(458 KB\)](#)

6. Closing Items

Subject : 6.01 Next Meeting: March 3, 2025
Meeting : Feb 3, 2025 - College Place Economic Development,
Tourism, and Events Commission- - Hybrid (In-Person &
Electronic)
Category : 6. Closing Items
Type : Information
Subject : 6.02 Conclude
Meeting : Feb 3, 2025 - College Place Economic Development,
Tourism, and Events Commission- - Hybrid (In-Person &
Electronic)
Category : 6. Closing Items
Type : Procedural

College Place Economic Development, Tourism, and Events Commission- Hybrid (In-Person & Electronic) (Monday, January 6, 2025)

Generated by Maryelizabeth Garcia on Monday, December 30, 2024

1. Opening Items

Procedural: 1.01 Call To Order

Commission Member Peck called the meeting to order at 5:10 PM.

Information: 1.02 Roll Call

PRESENT:

Commission Members	Kelli Leen; Doug Case; Allison Peck; Kirk Amick;
Ex- Officio	Arlene Alen - Walla Walla Valley Chamber of Commerce City Administrator, Michael Rizzitiello
Staff	Finance Director, Brian Carleton; Community Development Director, Jon Rickard; City Clerk, Maryelizabeth Garcia

Also Present:

MEMBERS EXCUSED:

Teri Lesmeister;

MEMBERS ABSENT:

Tracy Warner;

Procedural: 1.03 Public Comment

2. Consent Agenda

Action (Consent): 2.01 Approve Agenda for January 6, 2025.

Action (Consent), Minutes: 2.02 Approve Minutes from December 9, 2024

Action (Consent): 2.03 Approve Consent Agenda - Our adopted rules of Parliamentary Procedure, The Standard Code of Parliamentary Procedure, provide for a consent agenda listing items for approval of the Commission by a single motion. Typically the items listed under the consent agenda are the minutes from previous meetings and the agenda for the current meeting. Documentation concerning these items has been provided to all Commission Members and the public in advance to assure an extensive and thorough review. Items may be removed from the consent agenda at the request of any Commission Member.

Commission Member Leen made a motion to approve the consent agenda. Second by Amick and the motion passed 5-0.

3. Guest Presentations

Discussion, Information: 3.01 Comprehensive Economic Development Strategy (CEDS) Work - Mr. Saldana

To complete the next step of the CEDS process, Mr. Saldana facilitated discussion on College Place's strongest assets & opportunities for economic development, potential threats to economic progress, and city roles in improving economic vitality. Mr. Saldana identified that the next steps will include community surveys, stakeholder interviews, and completing the Target Industry Analysis.

Discussion ensued.

4. Action Agenda

Discussion, Information: 4.01 FY 2025 Selection of Chair & Vice Chair - Mr. Rizzitiello

Mr. Rizzitiello led the Commission in selecting a Chair and Vice Chair for CY2025.

Chair nominations: Doug Case was nominated for the position of Vice Chair.

Commission Member Leen made a motion to appoint Commission Member Case to the position of Vice Chair. Second by Member Amick and the motion passed 5-0.

Vice Chair nominations: Allison Peck was nominated for the position of Commission Chair.

Commission Member Amick made a motion to appoint Commission Member Case to the position of Commission Chair. Second by Member Leen and the motion passed 5-0.

Action: 4.02 Draft FY 2025 Economic Development Marketing Flyers - Mr. Rizzitiello

Mr. Rizzitiello presented four Economic Development Data Marketing flyers to the Commission which, if approved by Council, will be distributed to desirable businesses at upcoming conferences. The flyers highlighted College Place as a whole, the Downtown District, the Meadowbrook and Stone Creek District, and the Myra Road District.

Commission Member Alen made a motion to recommend the FY 2025 Economic Development Marketing flyers to Council. Second by Member Case and the motion passed 5-0.

5. Staff Reports

Discussion, Information: 5.01 College Place Marketing Efforts - Ms. Maryelizabeth Garcia

Ms. Garcia informed the Commission of updated marketing efforts in College Place including rebranding of College Place and the 2025 Visitor's Guide Flyer.

Discussion, Information: 5.02 Development Activity: January 2025

Mr. Rizzitiello provided a brief overview of Development Activity since November 2024 regarding commercial and residential developments within the City of College Place.

6. Closing Items

Information: 6.01 Next Meeting: February 2, 2025

Procedural: 6.02 Conclude

Commission Member Amick made a motion to conclude the meeting at 6:07 PM. Second by Commission Member Leen and with no objection, the meeting concluded.

Approved:

Allison Peck – Chair

Attest:

Maryelizabeth E. Garcia – City
Clerk

The foregoing minutes are the official record of the Economic Development, Tourism, and Events Commission meeting that occurred January 6, 2025. Further detail may be obtained by reviewing the actual audio recording made during this session.



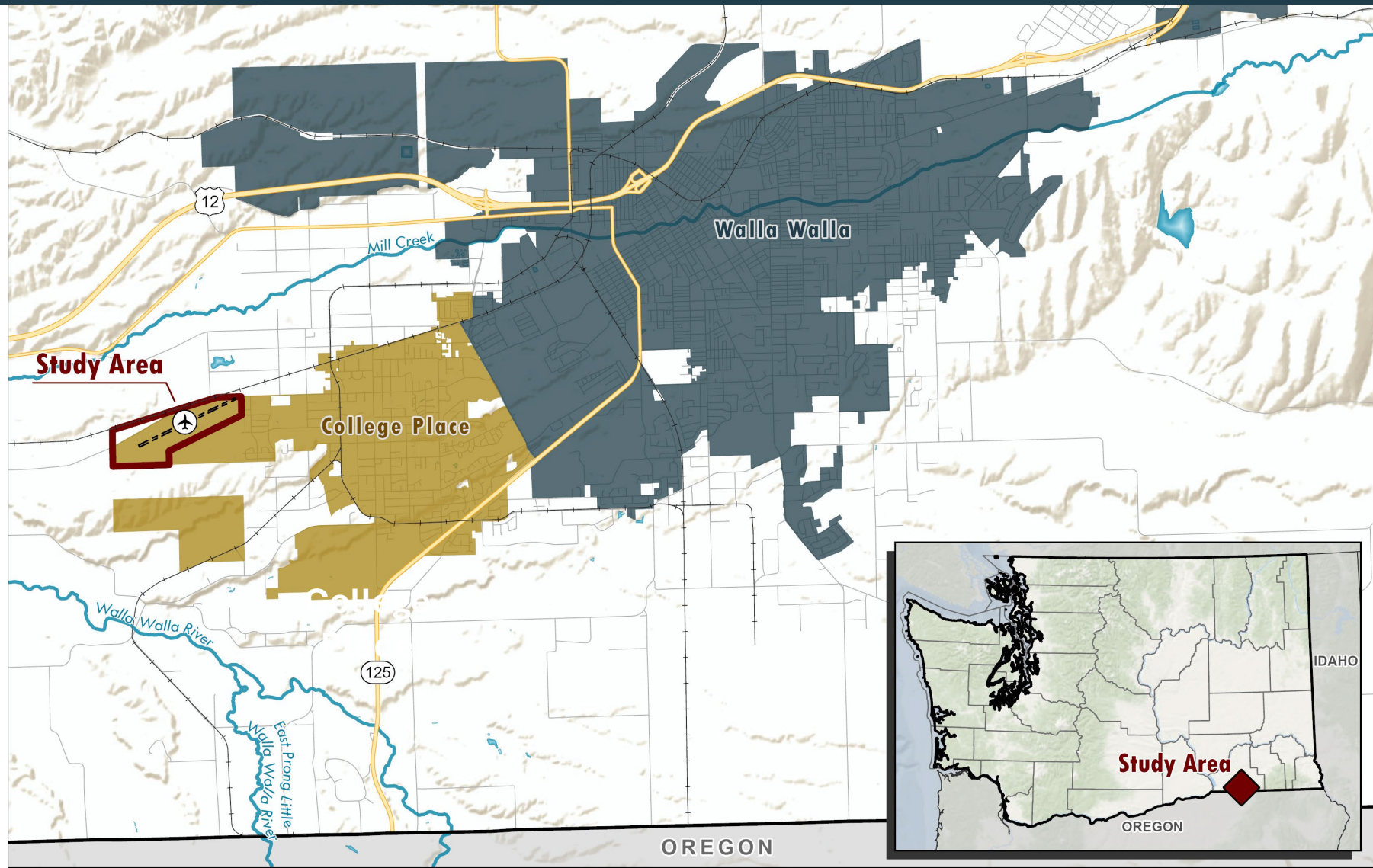
THE CITY OF COLLEGE PLACE MARTIN AIRFIELD AREA PLANNING STUDY

February 3, 2025

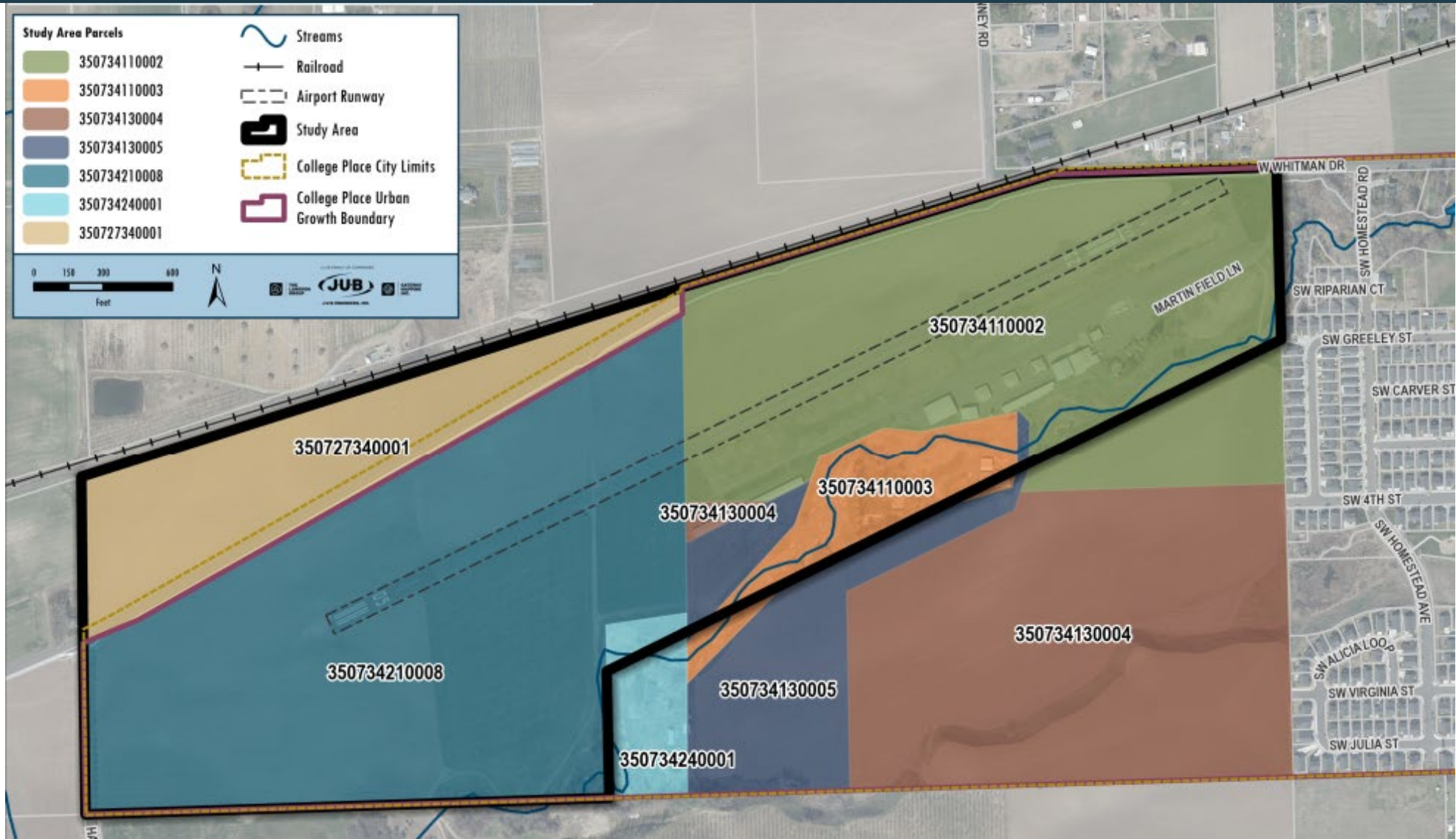


09/09/24

Project Location



Updated Study Area

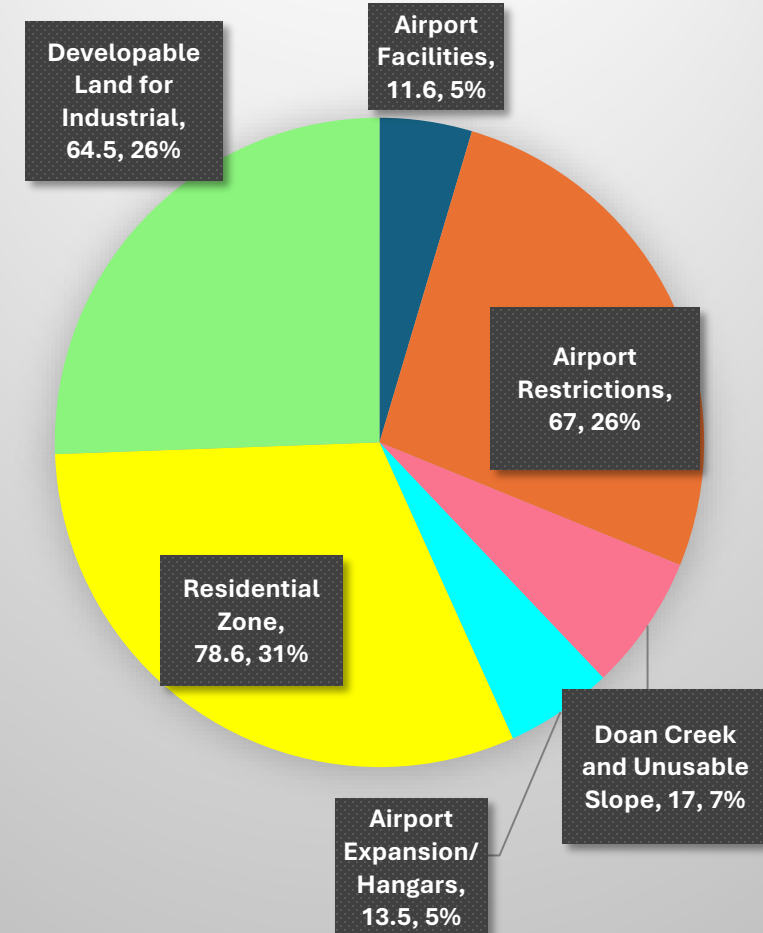
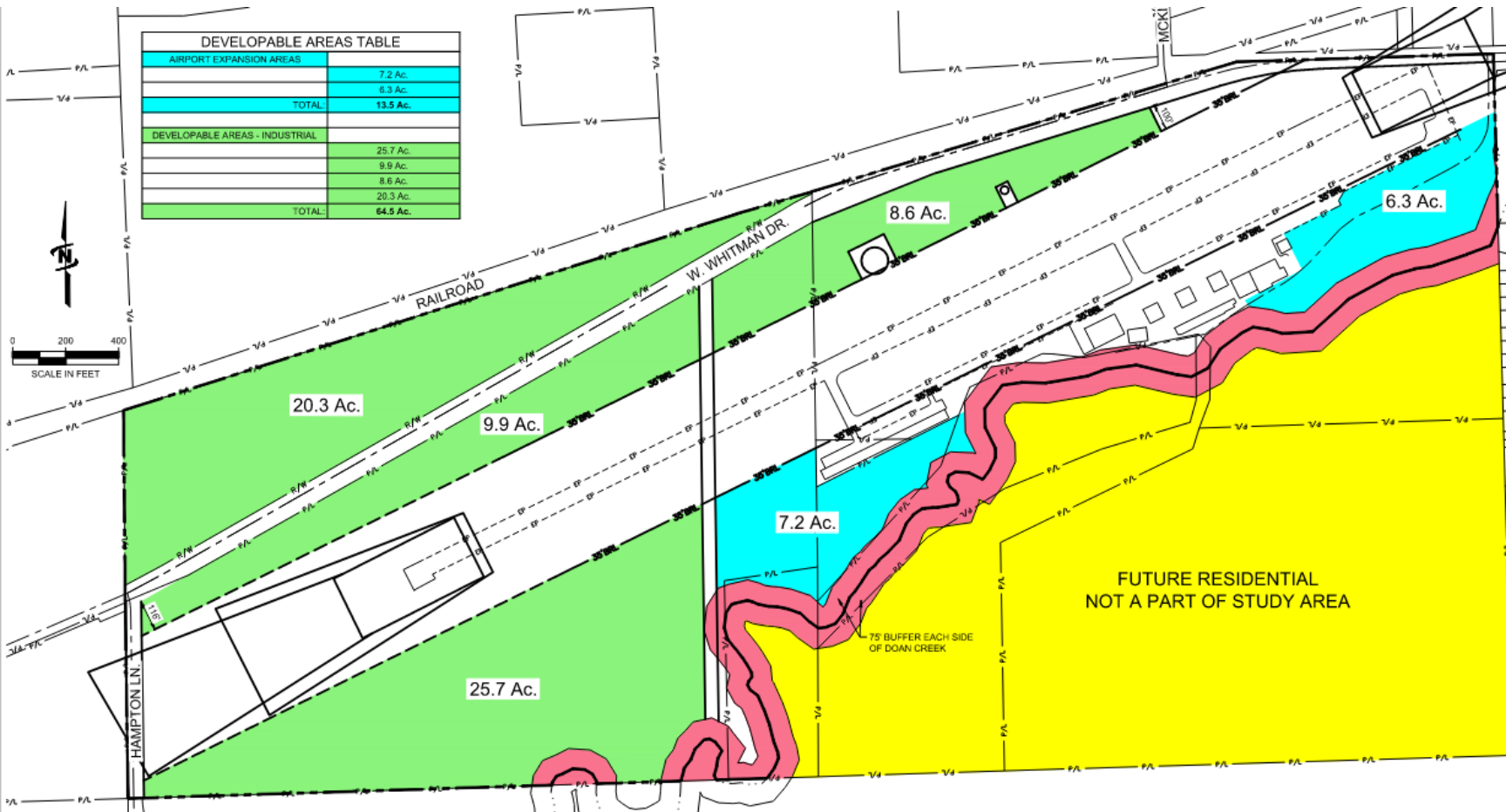


Overview of Scope



Current Progress

Developable Land



Current Progress

Concept Layout



Use	% of Site	Ac per Use	Typical Size
Wholesalers	25%	16.1	2-5 AC
Truck Transport	15%	9.7	2-5 AC
Manufacturing	20%	12.9	2-5 AC
Food Processing	15%	9.7	2-5 AC
Lab & Testing Facilities	10%	6.5	½ - 2 AC
Research & Development	15%	9.7	½ - 2 AC

Schedule of Completion

Task	Nov	Dec	Jan	Feb	Mar
Project State/Kick-Off Meeting					
Economic Feasibility					
Site Analysis					
Infrastructure Analysis					
Project Coord/Final Plan					

THANK YOU!

City of College Place

**Economic Development, Tourism,
and Events Commission**



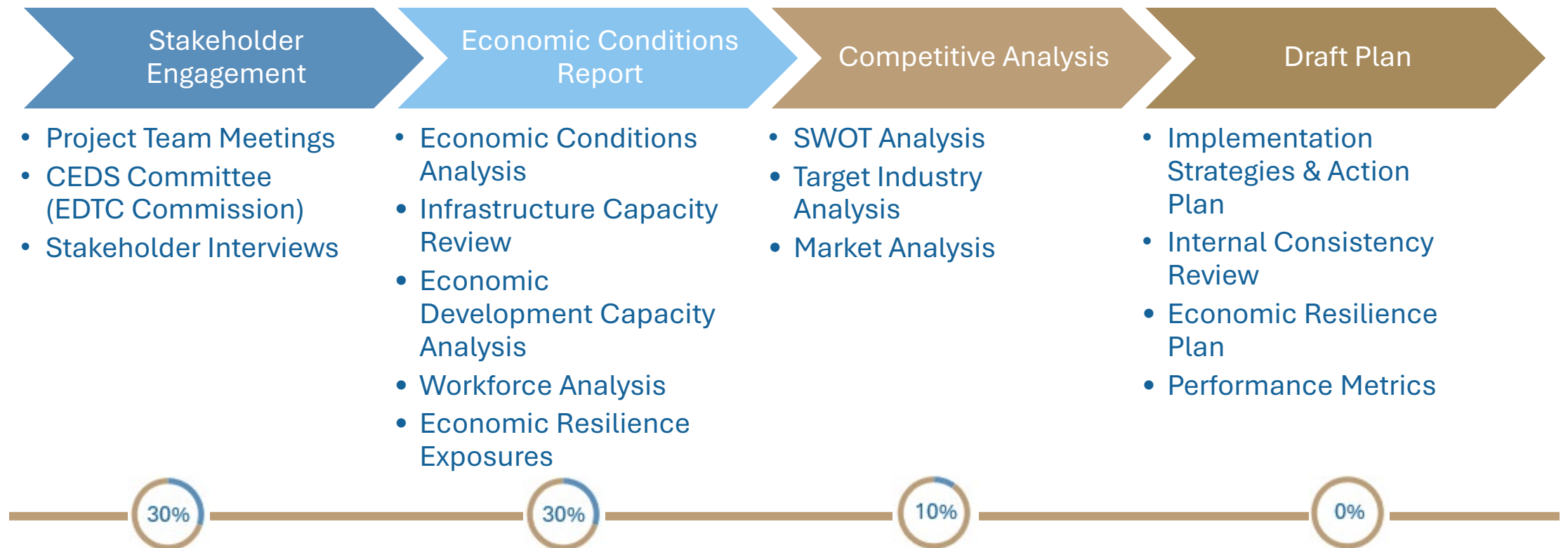
Comprehensive Economic Development Strategy

CEDS Update #1

December 2, 2024



The CEDS Planning Process



Economic Conditions Analysis

Population & Demographic Initial Profile

Consumer Segmentation Profile

Residential Market Activity Report

National Risk Index Report (Resiliency)

EDA Innovation Capacity Index

College Place At a Glance

Population and Demographics

- **Population:** College Place has a population of approximately 9,796 people.
- **Median Age:** The median age is 32.2 years, which is slightly younger than the national average.
- **Ethnicity:** The largest ethnic groups are White (Non-Hispanic) at 73.8%, White (Hispanic) at 7.68%, and Other (Hispanic) at 7%.

Income and Housing

- **Median Household Income:** The median household income is \$60,417, which has seen a 7.04% increase from the previous year.
- **Median Property Value:** The median property value is \$294,700, with an 18% increase over the past year.
- **Homeownership Rate:** The homeownership rate is 65.5%.

Employment and Unemployment

- **Employed Population:** The employed population is 4,400, which has seen a slight decline of 2.11% over the past year.
- **Unemployment Rate:** The unemployment rate is 5.6%, which is relatively close to the national average.

Cost of Living

- **Cost of Living:** The cost-of-living index in College Place is 96, which is lower than the national average.
- **Median Rent:** The median rent is \$1,027.

Residential Market

- **Median Home Value:** \$420,000 as of 10/31/2024, a decrease of 5.71% over last month and a decrease of 6.64% over 12 months.
- **Median Sales Price:** \$414,000 and increase of 3.59% over last month and 4.9% over 12 months.
- **Activity Summary:** 10 sales, low of \$250,000 high of \$735,000 total sales volume of \$4.3 million.

Key Trends

- **Population Growth:** The population has seen a slight increase of 0.585% over the past year.
- **Income Growth:** There has been a notable increase in median household income.
- **Property Value Growth:** Property values have increased significantly, indicating a strong real estate market.

Consumer Segmentation

What are the people like that live in this area?

GenXurban
Gen X in middle age; families with fewer kids and a mortgage

Urbanization
Where do people like that usually live?

Suburban Periphery
The most populous and fastest-growing among Urbanization groups, Suburban Periphery includes one-third of the nation's population

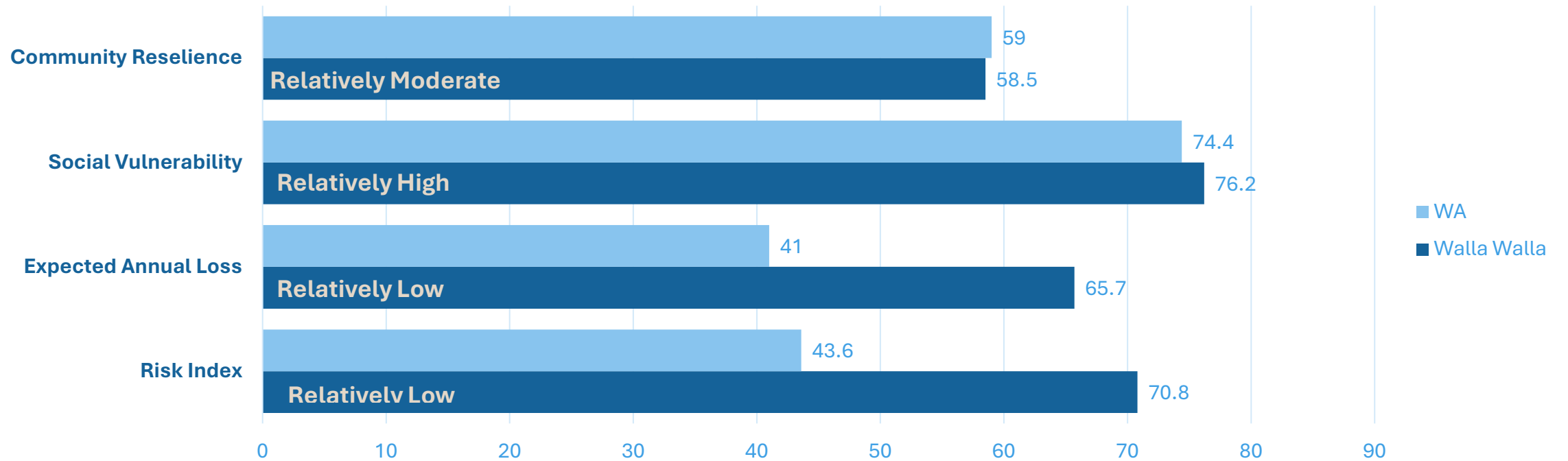
Top Tapestry Segments	Midlife Constants	Old and Newcomers	Set to Impress	College Towns	Salt of the Earth
% of Households	1,499 (39.4%)	912 (23.9%)	586 (15.4%)	378 (9.9%)	311 (8.2%)
% of Walla Walla County	2,128 (9.0%)	1,918 (8.2%)	1,404 (6.0%)	902 (3.8%)	823 (3.5%)
Lifestyle Group	GenXurban	Middle Ground	Midtown Singles	Scholars and Patriots	Cozy Country Living
Urbanization Group	Suburban Periphery	Metro Cities	Metro Cities	Metro Cities	Rural
Residence Type	Single Family	Single Family; Multi-Units	Multi-Unit Rentals; Single Family	Multi-Unit Rentals; Single Family	Single Family
Household Type	Married Couples w/No Kids	Singles	Singles	Singles	Married Couples
Average Household Size	2.3	2.11	2.06	2.07	2.52
Median Age	48	40.5	35.1	22.8	45
Diversity Index	48	62.3	72.4	65	28.3
Median Household Income	\$56,700	\$55,400	\$44,700	\$44,400	\$72,300
Median Net Worth	\$57,800	\$63,100	\$17,000	\$13,500	\$231,300
Median Home Value	\$215,400	\$242,900	\$207,900	\$271,400	\$220,300
Homeownership	75.2 %	49.3 %	31.3 %	28.3 %	85.4 %
Employment	Professional or Mgmt/Bus/Financial	Professional or Services	Services or Professional	Professional or Services	Professional or Mgmt/Bus/Financial
Education	High School Diploma	Some College No Degree	High School Diploma	Bachelor's Degree	High School Diploma
Preferred Activities	Sociable, church-going residents . Enjoy movies at home, reading, fishing and golf.	Strong sense of community volunteer for charities . Food features convenience, frozen and fast food.	Maintain close relationships with family . Enjoy going to rock concerts, night clubs, and the zoo.	Go out to the movies and out for drinks . Popular activities: backpacking, Pilates, and Frisbee.	Spending time with family is their top priority . Outdoor sports and activities.
Financial	42% receive Social Security, 27% also receive retirement income	Price aware and coupon clippers, but open to impulse buys	Prefer name brands, buy generic when it's a better deal	Limited incomes result in thrifty purchases	Prefer to conduct business in person
Media	After TV, Radio and newspapers are medias of choice	Features the Internet, listening to country music and read the paper	Use the Internet for social media, video games and watching TV	Use the Internet for social media, blogging, watch movies and TV.	Satellite dishes and high speed internet through DSL
Vehicle	Own domestic SUVs, trucks	View car as transportation only	Own used, imported vehicles	Prefer vehicle with good gas mileage	Own truck, ATV

Consumer Segmentation Market Profile

Midlife Constants 39.4% 2.4% in US	Prefer practical vehicles like SUVs and trucks (domestic, of course). Sociable, church-going residents belonging to fraternal orders, veterans' clubs and charitable organizations and do volunteer work and fund-raising. Contribute to arts/cultural, educational, health, and social services organizations. DIY homebodies that spend on home improvement and gardening. Media preferences: country or movie channels. Leisure activities include movies at home, reading, fishing, and golf.
Old and Newcomers 23.9% 2.3% in US	Residents have a strong sense of community. They volunteer for charities, help fund raise, and recycle. They prefer cell phones to landlines. Entertainment features the Internet (employment searches, rating products, updating social media profiles), watching movies at home, listening to country music, and reading the paper. Vehicles are basically just a means of transportation. Food features convenience, frozen and fast food. They do banking as likely in person as online.
Set to Impress 15.4% 1.4% in US	Listen to a variety of the latest music and download music online. Majority have cell phones only, no landlines. Use the Internet for social media, downloading video games, and watching TV programs. Own used, imported vehicles. Prefer shopping for bargains at Walmart, including discount stores like Kmart, Big Lots, and the local dollar store. Enjoy leisure activities including going to rock concerts, night clubs, and the zoo.
College Towns 9.9% 0.9% in US	Own laptops/notebooks and video game systems. Prefer to watch movies and TV programs online; but do watch some TV like MTV2, ESPNNews, ESPN2, and Comedy Central. Use the Internet for social media connections, blogging, paying bills, and searching for jobs. Have cell phones only (no landlines) and enjoy customizing them. Popular activities: backpacking, Pilates, and Frisbee. Go out to the movies and out for drinks.
Salt of the Earth 8.2% 2.8% in US	Outdoor sports and activities, such as fishing, boating, hunting, and overnight camping trips are popular. To support their pastimes, truck ownership is high; many also own an ATV. They own the equipment to maintain their lawns and tend to their vegetable gardens. Residents often tackle home remodeling and improvement jobs themselves. Due to their locale, they own satellite dishes, and have access to high-speed internet connections like DSL. These conservative consumers prefer to conduct their business in person rather than online. They use an agent to purchase insurance.

National Risk Index

FEMA National Risk Database for Walla Walla County, WA (11/23/2024)



EDA Innovation Capacity Profile

Human Capital and Knowledge Creation Index 116.3

The relative availability of human capital resources is moderate in this area. The top measures for this index are:

- Associate's Degree Attainment (rank 316)
- Some College Attainment (rank 396)

Business Dynamics Index 122.6

Patterns of establishment formation and composition indicate a moderate level of business competitiveness. The top measures for this index are:

- Traded Sector Establishment Births to Deaths Ratio (rank 514)
- Change in Establishment Births to All Establishment Ratio (rank 1227)

Business Profile Index 67.2

The relative availability of resources for entrepreneurs and businesses is low in this area. The top measures for this index are:

- Industry Diversity (rank 814)
- Average Large Establishments (per 10,000 Workers) (rank 769)

Employment and Productivity Index 120.6

Industry performance in Walla Walla County, WA indicate a moderate level of positive outcomes from existing economic activity. The top measures for this index are:

- Patent Diversity (rank 878)
- Change in Gross Domestic Product (per Worker) (rank 548)

Economic Well-Being Index 133.1

As measured by residential internet connectivity and income, this area has a moderate standard of living. The top measures for this index are:

- Broadband Infrastructure and Adoption (rank 971)
- Change in Annual Wage and Salary Earnings per Worker (rank 858)

The Next Steps



Complete Economic
Conditions Analysis



Conduct SWOT
Analysis Survey



January Commission
Meeting – Strategic
Discussion



Site Visit by Team

Questions



ECONOMIC GROWTH
STRATEGIES

Comprehensive Economic Development Strategy (CEDS)



DRAFT

**Phase 1: Economic Conditions Report
Phase 2: Industry Cluster Analysis**



Data Analytics by:



This project is funded in part by the U.S. Department of Commerce Economic
Development Administration (EDA)

Project Number: ED24SEA0G0351

Table of Contents

I. Economic Conditions Analysis.....	2
Overview.....	2
Census-Based Demographic and Economic Overview.....	2
II. Workforce Analysis.....	20
Unemployment Rate Data	20
Demographic and Employment Forecasts	21
III. Commercial/Industrial Real Estate Market Data.....	23
Retail Market	23
Office Market.....	24
Industrial Market	25
IV. Industry Cluster Analysis.....	26
Definitions and Focus of Local/Regional Industry Clusters Analysis	26
V. Economic Development Capacity Analysis	51
EDA Economic Development Capacity Index	51
Innovation Intelligence Index	52
VI. Economic Resilience.....	54
What is Economic Resilience?	54
Overall Economic Resilience Strategies.....	56

Tables

Table II-1. Selected Economic Characteristics from U.S. Census Bureau, College Place, Selected Counties, and Washington, 2023	4
Table II-2. Selected Housing Characteristics from U.S. Census Bureau, College Place, Selected Counties, and Washington, 2023	11
Table II-3. Selected Education Characteristics From U.S. Census Bureau, College place, Selected Counties, and Washington 2023	15
Table II-4. Selected Household And Age Characteristics From U.S. Census Bureau, College Place, Selected Counties, and Washington, 2023.	18
Table II-5. Regional Growth Projections: College Place Area and Walla County, 2019-2045	21
Table III-1. Key Retail Market Indicators, City of College Place	23
Table III-2. Key Retail Market Indicators, Walla Walla County	23
Table III-3. Key Office Market Indicators, City of College Place	24
Table III-4. Key Office Market Indicators, Walla Walla County	24
Table III-5. Key Industrial Market Indicators, City of College Place	25
Table III-6. Key Industrial Market Indicators, Walla Walla County	25

Figures

Figure II-1. Unemployment Rate Estimates: Walla Walla, Franklin, Benton and Washington (2014-23)	20
--	----

Summary

This report represents data for Phase 1 and 2 of the research required to inform the CEDS. The analysis also includes additional data to support the development of key action plans and is intended to be used in conjunction with the final CEDS plan.

An executive summary will be included in the final CEDS plan of the economic data with an appendix that will contain the detailed charts and information contained in this report.

I. Economic Conditions Analysis

Overview

This section provides preliminary background information and data for the Comprehensive Economic Development Strategy being prepared for the City of College Place. This section evaluates key demographic and economic data at multiple levels of geography (city, county, and state) to allow for comparison of local conditions to reference-area benchmarks.

This section (*Census-Based Demographic and Economic Overview*) provides a market overview that summarizes the most recent demographic and economic data from the following sources:

- Data from the U.S. Census Bureau, American Community Survey (ACS) program. These data are grouped into the following categories: Economic Characteristics, Housing Units, Education, and Households.
- Labor force data, including unemployment rates provided by the Bureau of Labor Statistics (BLS).
- Demographic and Employment forecasts from the Walla Walla Valley Metropolitan Planning Organization (WWVMPO)

Census-Based Demographic and Economic Overview

The following data were obtained from the U.S. Census Bureau, American Community Survey (ACS) 5-year estimates (2018-23). Data are provided for the City of College Place, Walla Walla County, Franklin and Benton Counties (Kennewick-Richland MSA), and Washington. Topics address current conditions related to economic characteristics, housing units, educational attainment, and households/families.

Table II-1, on pages 3 to 7, provide a summary of economic characteristics from the ACS. The table provides data related to labor force characteristics, household and per capita income levels, and health insurance coverage and poverty level rates. Some of the key include data highlights include the following:

- For the 16 years and over population, the City has a relatively slightly higher share of the population (61.8%) in the labor force compared to Walla Walla County, but a relatively low percentage compared to Franklin County and the State. The unemployment rate (4.6%) was lower than all the reference geographies.
- For workers 16 years and over commuting work, the mean travel time to work was relatively low for College Place residents (13.2 minutes) compared to all the reference geographies.

- In terms of occupational employment, a larger share of College Place residents is employed in *Service and Sales and office* occupations compared to the benchmark geographies. In contrast, College Place residents hold a relatively lower share of jobs in *Natural resources, construction, and maintenance* occupations.
- In terms of industry sector employment, the largest share of College Place residents (37.3%) is employed in the *Educational services, and health care and social assistance industry* sector, which is significantly higher than all of the benchmark geographies. In contrast, the City has a relatively smaller share (2.8%) of its residents employed in the *Construction* sector.
- For the income and benefits category, the largest share of College Place households (20.6%) is in the \$50,000 to \$74,999 household income range. The City's households are relatively underrepresented (10.7%) in the \$75,000 to \$99,999 household income range.
 - Following from above, the City's median household income level (\$59,768) is well below the median level in the benchmark geographies.
- The City's health insurance coverage rate (95.4%) is slightly higher than the benchmark geographies' rates .
- Poverty rates – as measured by families and people whose income in the past 12 months was below the poverty level – for all categories of families are slightly higher (10.3%) in College Place compared to the benchmark regions, while significantly higher than the statewide average (6.4%).

TABLE II-1. SELECTED ECONOMIC CHARACTERISTICS FROM U.S. CENSUS BUREAU, COLLEGE PLACE, SELECTED COUNTIES, AND WASHINGTON, 2023

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
EMPLOYMENT STATUS					
Population 16 years and over	7,826	50,787	70,525	161,217	6,252,501
In labor force	61.8%	59.1%	66.3%	62.4%	64.7%
Civilian labor force	61.7%	58.7%	66.1%	62.2%	63.6%
Employed	58.8%	55.4%	62.5%	59.1%	60.5%
Unemployed	2.8%	3.3%	3.5%	3.1%	3.2%
Armed Forces	0.1%	0.4%	0.2%	0.2%	1.0%
Not in labor force	38.2%	40.9%	33.7%	37.6%	35.3%
Civilian labor force	4,825	29,827	46,583	100,263	3,979,692
Unemployment Rate	4.6%	5.7%	5.3%	5.0%	5.0%
Females 16 years and over	3,923	24,905	33,589	80,338	3,116,954
In labor force	58.3%	56.9%	60.5%	56.8%	59.2%
Civilian labor force	58.3%	56.7%	60.3%	56.6%	58.9%
Employed	56.6%	53.7%	57.0%	53.7%	56.0%
Own children of the householder under 6 years	686	3,685	9,567	16,477	508,780
All parents in family in labor force	64.6%	66.6%	63.7%	60.7%	62.2%
Own children of the householder 6 to 17 years	1,524	8,803	19,315	36,848	1,092,046
All parents in family in labor force	84.6%	71.2%	70.7%	67.6%	69.3%
COMMUTING TO WORK					
Workers 16 years and over	4,431	27,673	42,887	93,539	3,750,832
Car, truck, or van -- drove alone	65.4%	69.7%	76.4%	75.0%	64.7%
Car, truck, or van -- carpooled	10.2%	9.4%	13.7%	10.3%	8.7%
Public transportation (excluding taxicab)	1.4%	0.8%	0.3%	1.1%	4.0%
Walked	11.3%	6.6%	1.1%	1.1%	3.1%
Other means	1.0%	2.3%	1.2%	0.9%	1.9%
Worked from home	10.5%	11.2%	7.2%	11.6%	17.7%
Mean travel time to work (minutes)	13.2	14.9	22.2	22.2	27.0
OCCUPATION					
Civilian employed population 16 years and over	4,605	28,129	44,093	95,245	3,781,332
Management, business, science, and arts occupations	37.1%	36.6%	33.0%	41.7%	45.5%

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
Service occupations	28.1%	21.8%	17.0%	16.2%	15.6%
Sales and office occupations	22.8%	18.2%	16.6%	17.7%	18.0%
Natural resources, construction, and maintenance occupations	2.3%	9.6%	18.8%	12.2%	9.3%
Production, transportation, and material moving occupations	9.7%	13.8%	14.6%	12.3%	11.6%
INDUSTRY					
Civilian employed population 16 years and over	4,605	28,129	44,093	95,245	3,781,332
Agriculture, forestry, fishing and hunting, and mining	2.1%	6.7%	12.9%	4.9%	2.5%
Construction	2.8%	6.2%	8.5%	9.1%	7.2%
Manufacturing	5.1%	7.8%	8.6%	7.2%	9.2%
Wholesale trade	1.6%	1.5%	2.9%	2.1%	2.3%
Retail trade	13.1%	13.1%	10.7%	10.7%	11.6%
Transportation and warehousing, and utilities	3.3%	5.4%	6.6%	6.3%	5.8%
Information	1.2%	1.4%	0.5%	1.3%	2.5%
Finance and insurance, and real estate and rental and leasing	3.2%	3.3%	3.3%	3.7%	5.3%
Professional, scientific, and management, and administrative and waste management services	10.0%	7.9%	10.4%	14.8%	14.5%
Educational services, and health care and social assistance	37.3%	27.0%	20.0%	21.7%	21.4%
Arts, entertainment, and recreation, and accommodation and food services	9.2%	10.9%	7.4%	8.5%	8.4%
Other services, except public administration	3.2%	2.7%	3.4%	4.6%	4.4%
Public administration	7.8%	6.0%	4.8%	5.0%	5.0%
CLASS OF WORKER					
Civilian employed population 16 years and over	4,605	28,129	44,093	95,245	3,781,332
Private wage and salary workers	78.2%	75.2%	78.5%	77.8%	78.4%
Government workers	18.2%	18.0%	16.1%	17.4%	15.8%

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
Self-employed in own not incorporated business workers	3.6%	6.6%	5.3%	4.6%	5.6%
Unpaid family workers	0.0%	0.2%	0.1%	0.2%	0.2%
INCOME AND BENEFITS (IN 2021 INFLATION-ADJUSTED DOLLARS)					
Total households	3,184	23,390	29,118	76,696	3,020,558
Less than \$10,000	3.5%	4.4%	4.2%	3.2%	3.8%
\$10,000 to \$14,999	4.2%	5.3%	2.0%	2.8%	2.7%
\$15,000 to \$24,999	8.1%	7.0%	5.1%	5.4%	4.9%
\$25,000 to \$34,999	13.3%	7.3%	6.4%	6.1%	5.3%
\$35,000 to \$49,999	8.0%	10.4%	10.5%	9.6%	8.6%
\$50,000 to \$74,999	20.6%	17.0%	17.2%	15.8%	14.6%
\$75,000 to \$99,999	10.7%	15.0%	15.3%	13.9%	12.6%
\$100,000 to \$149,999	16.4%	16.7%	18.9%	19.3%	19.2%
\$150,000 to \$199,999	8.1%	7.8%	9.2%	11.1%	11.3%
\$200,000 or more	7.1%	9.2%	11.5%	12.8%	17.2%
Median household income (dollars)	59,768	72,212	82,755	87,316	94,952
Mean household income (dollars)	89,649	96,277	105,287	111,832	129,559
With earnings	72.7%	73.4%	83.2%	77.8%	78.8%
Mean earnings (dollars)	84,689	95,137	107,290	112,504	132,286
With Social Security	39.0%	36.8%	23.2%	29.3%	29.0%
Mean Social Security income (dollars)	21,007	23,421	23,397	27,256	25,031
With retirement income	29.9%	25.4%	19.3%	26.3%	24.1%
Mean retirement income (dollars)	25,068	35,684	30,620	34,567	34,740
With Supplemental Security Income	5.0%	5.2%	3.4%	5.1%	4.4%
Mean Supplemental Security Income (dollars)	11,764	12,901	12,200	11,378	11,635
With cash public assistance income	3.2%	3.0%	3.8%	3.3%	3.4%
Mean cash public assistance income (dollars)	2,873	3,396	6,221	4,354	4,882
With Food Stamp/SNAP benefits in the past 12 months	9.9%	12.4%	19.5%	14.4%	11.4%
Families	1,995	14,704	23,124	52,929	1,928,170
Less than \$10,000	2.6%	2.8%	3.8%	2.5%	2.5%
\$10,000 to \$14,999	2.3%	1.8%	1.0%	1.4%	1.2%
\$15,000 to \$24,999	4.6%	3.9%	4.2%	3.6%	2.8%

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
\$25,000 to \$34,999	8.9%	4.5%	6.2%	4.4%	3.6%
\$35,000 to \$49,999	2.5%	8.3%	10.3%	8.6%	6.9%
\$50,000 to \$74,999	23.8%	15.6%	16.5%	14.0%	13.2%
\$75,000 to \$99,999	14.5%	18.4%	15.4%	13.4%	13.1%
\$100,000 to \$149,999	20.9%	21.2%	19.8%	22.3%	21.6%
\$150,000 to \$199,999	11.0%	11.3%	10.1%	13.7%	13.6%
\$200,000 or more	9.1%	12.2%	12.7%	16.0%	21.6%
Median family income (dollars)	84,493	90,621	88,256	103,290	114,068
Mean family income (dollars)	109,669	117,917	111,340	127,248	150,744
Per capita income (dollars)	31,847	37,562	32,752	41,588	51,493
Nonfamily households	1,189	8,686	5,994	23,767	1,092,388
Median nonfamily income (dollars)	34,943	40,682	50,211	53,073	59,539
Mean nonfamily income (dollars)	52,548	54,921	65,961	68,762	85,180
Median earnings for workers (dollars)	29,243	37,232	41,027	47,348	52,247
Median earnings for male full-time, year-round workers (dollars)	56,162	64,286	58,501	74,160	79,606
Median earnings for female full-time, year-round workers (dollars)	57,780	51,498	46,822	54,349	63,283
HEALTH INSURANCE COVERAGE					
Civilian noninstitutionalized population	9,694	59,283	95,536	208,892	7,623,297
With health insurance coverage	95.4%	92.0%	86.8%	92.5%	93.6%
With private health insurance	68.4%	66.1%	56.8%	67.8%	70.9%
With public coverage	43.7%	42.2%	41.9%	39.3%	35.8%
No health insurance coverage	4.6%	8.0%	13.2%	7.5%	6.4%
Civilian noninstitutionalized population under 19 years	2,623	14,544	32,340	58,292	1,767,739
No health insurance coverage	0.4%	3.5%	6.2%	2.3%	3.0%
Civilian noninstitutionalized population 19 to 64 years	5,311	33,220	53,553	118,253	4,619,674
In labor force:	4,218	26,094	43,313	92,102	3,665,139
Employed:	4,030	24,640	41,315	87,675	3,490,490
With health insurance coverage	92.8%	87.7%	80.9%	89.4%	91.9%
With private health insurance	78.9%	77.9%	70.4%	80.3%	83.9%

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
With public coverage	21.6%	14.7%	16.1%	13.2%	11.5%
No health insurance coverage	7.2%	12.3%	19.1%	10.6%	8.1%
Unemployed:	188	1,454	1,998	4,427	174,649
With health insurance coverage	51.6%	69.1%	72.5%	69.5%	80.2%
With private health insurance	42.0%	41.7%	24.6%	32.6%	45.4%
With public coverage	15.4%	34.6%	49.9%	40.9%	38.5%
No health insurance coverage	48.4%	30.9%	27.5%	30.5%	19.8%
Not in labor force:	1,093	7,126	10,240	26,151	954,535
With health insurance coverage	96.2%	90.3%	79.8%	86.3%	89.1%
With private health insurance	65.1%	51.6%	46.0%	53.8%	54.5%
With public coverage	36.3%	44.7%	44.3%	41.3%	41.6%
No health insurance coverage	3.8%	9.7%	20.2%	13.7%	10.9%
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL					
All families	10.3%	8.4%	10.2%	8.4%	6.4%
With related children of the householder under 18 years	12.5%	11.5%	12.1%	12.8%	9.8%
With related children of the householder under 5 years only	0.0%	4.6%	6.8%	10.7%	8.7%
Married couple families	5.7%	5.0%	5.6%	4.6%	3.3%
With related children of the householder under 18 years	5.1%	4.0%	6.2%	5.3%	4.0%
With related children of the householder under 5 years only	0.0%	1.1%	7.3%	2.5%	3.2%
Families with female householder, no spouse present	32.6%	24.0%	24.0%	23.1%	20.5%
With related children of the householder under 18 years	49.2%	32.9%	25.0%	34.0%	28.2%
With related children of the householder under 5 years only	-	28.4%	6.1%	37.6%	32.3%
All people	10.7%	11.7%	13.0%	11.1%	9.9%
Under 18 years	13.3%	13.6%	16.7%	15.4%	11.9%
Related children of the householder under 18 years	13.3%	13.1%	16.6%	15.2%	11.5%

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
Related children of the householder under 5 years	10.5%	13.6%	14.8%	16.7%	12.9%
Related children of the householder 5 to 17 years	14.3%	12.9%	17.2%	14.6%	11.0%
18 years and over	9.9%	11.2%	11.3%	9.5%	9.4%
18 to 64 years	8.4%	10.8%	11.2%	9.6%	9.6%
65 years and over	13.6%	12.1%	11.8%	9.3%	8.5%
People in families	9.1%	8.2%	11.6%	9.3%	6.8%
Unrelated individuals 15 years and over	16.8%	24.6%	24.1%	19.2%	20.6%

Source: U.S. Census Bureau, 2023: ACS 5-Year Estimates Data Profile, Selected Economic Characteristics; TNDG.

Table II-2, on the following three pages, provide housing related data from the ACS. Some of the data highlights include the following:

- The occupied housing rate- ranging from 92.6% to 95.5% - is relatively similar across all the benchmark geographies.
- The distribution of housing units by units in structure show that College Place has a relatively smaller share of *1-unit, detached* dwelling units (58.6%) compared to the benchmark geographies. College Place has a relatively high share in the following categories: *2 units, 3 or units, and Mobile homes*.
- Cloose to one-third (31.1%) of 3,438 of the City’s housing units have been built since the year 2000, which is well above the overall share in Walla Walla County (22.2%). below the shares in all benchmark cities and in the County. Just over one-half (51.5%) of College Place’s housing units were built between the 40-year period from 1960 to 2000, a higher share than all the benchmark regions but similar to the statewide share (51.3%).
- College has a higher share of owner-occupied housing units (64.8%) than renter-occupied (35.2%).
- Monthly housing costs – measured as percentage of household income – in College Place vary for ownership versus rental properties.
 - For housing units with a mortgage, about 41% of College Place households have monthly expenses that are less than 20% of household income. This share is below the benchmark regional geographies but close to the statewide share (42.5%).
 - For rental dwelling units, about 47% of College Place households have gross rent costs that are 35.0% or more of household income. This share is similar to Walla Walla County, but higher than the shares in the benchmark geographies.

TABLE II-2. SELECTED HOUSING CHARACTERISTICS FROM U.S. CENSUS BUREAU, COLLEGE PLACE, SELECTED COUNTIES, AND WASHINGTON, 2023

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
HOUSING OCCUPANCY					
Total housing units	3,438	25,219	30,488	81,792	3,262,667
Occupied housing units	92.6%	92.7%	95.5%	93.8%	92.6%
Vacant housing units	7.4%	7.3%	4.5%	6.2%	7.4%
Homeowner vacancy rate	0.0	0.2	0.7	0.9	0.8
Rental vacancy rate	10.4	6.1	3.9	5.7	4.3
UNITS IN STRUCTURE					
Total housing units	3,438	25,219	30,488	81,792	3,262,667
1-unit, detached	58.6%	68.4%	73.2%	63.4%	62.3%
1-unit, attached	3.9%	3.9%	3.1%	3.4%	4.3%
2 units	6.8%	3.5%	1.6%	3.5%	2.3%
3 or 4 units	7.1%	3.6%	3.1%	3.7%	3.5%
5 to 9 units	6.0%	5.3%	3.2%	4.5%	4.4%
10 to 19 units	4.7%	2.3%	2.9%	3.3%	4.8%
20 or more units	2.9%	6.1%	5.2%	9.0%	12.5%
Mobile home	10.0%	6.7%	7.5%	8.7%	5.6%
Boat, RV, van, etc.	0.0%	0.2%	0.2%	0.4%	0.2%
YEAR STRUCTURE BUILT					
Total housing units	3,438	25,219	30,488	81,792	3,262,667
Built 2020 or later	1.9%	0.8%	2.5%	1.7%	1.3%
Built 2010 to 2019	14.5%	9.4%	18.7%	14.0%	11.5%
Built 2000 to 2009	14.7%	12.0%	25.0%	16.7%	15.0%
Built 1990 to 1999	10.4%	9.5%	11.8%	15.6%	15.3%
Built 1980 to 1989	12.9%	8.2%	4.3%	7.0%	12.5%
Built 1970 to 1979	16.4%	13.9%	14.6%	17.9%	14.6%
Built 1960 to 1969	11.8%	7.8%	7.6%	8.2%	8.9%
Built 1950 to 1959	5.1%	10.7%	7.9%	8.3%	6.8%

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
Built 1940 to 1949	4.6%	6.2%	4.0%	8.2%	4.4%
Built 1939 or earlier	7.6%	21.4%	3.6%	2.4%	9.7%
HOUSING TENURE					
Occupied housing units	3,184	23,390	29,118	76,696	3,020,558
Owner-occupied	64.8%	65.9%	70.1%	68.5%	63.9%
Renter-occupied	35.2%	34.1%	29.9%	31.5%	36.1%
Average household size of owner-occupied unit	2.97	2.62	3.23	2.83	2.65
Average household size of renter-occupied unit	2.19	2.11	3.34	2.45	2.27
MORTGAGE STATUS					
Owner-occupied units	2,064	15,424	20,405	52,533	1,929,694
Housing units with a mortgage	56.7%	57.7%	67.0%	63.1%	66.8%
Housing units without a mortgage	43.3%	42.3%	33.0%	36.9%	33.2%
SELECTED MONTHLY OWNER COSTS AS A PERCENTAGE OF HOUSEHOLD INCOME (SMOCAPI)					
Housing units with a mortgage (excluding units where SMOCAP cannot be computed)					
Less than 20.0 percent	40.8%	43.2%	49.6%	51.7%	42.5%
20.0 to 24.9 percent	18.6%	18.1%	13.0%	15.8%	16.7%
25.0 to 29.9 percent	17.6%	12.4%	10.8%	11.0%	11.6%
30.0 to 34.9 percent	11.7%	7.0%	8.5%	6.5%	8.0%
35.0 percent or more	11.3%	19.4%	18.1%	14.9%	21.2%
Housing unit without a mortgage (excluding units where SMOCAP cannot be computed)					
Less than 10.0 percent	40.0%	45.8%	55.1%	54.5%	45.6%
10.0 to 14.9 percent	27.3%	19.5%	19.9%	17.8%	19.9%
15.0 to 19.9 percent	3.1%	8.2%	11.6%	8.4%	10.9%
20.0 to 24.9 percent	4.6%	5.3%	2.4%	5.1%	6.3%
25.0 to 29.9 percent	12.0%	4.6%	1.8%	3.0%	3.9%
30.0 to 34.9 percent	3.2%	2.8%	0.7%	2.3%	2.7%

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
35.0 percent or more	9.8%	13.9%	8.4%	9.1%	10.7%
GROSS RENT					
Occupied units paying rent	1,096	7,421	8,229	23,336	1,051,069
Less than \$500	4.7%	6.7%	7.4%	4.5%	4.9%
\$500 to \$999	39.6%	35.7%	30.7%	21.8%	11.9%
\$1,000 to \$1,499	29.1%	31.4%	35.6%	43.2%	23.9%
\$1,500 to \$1,999	22.8%	15.9%	17.7%	20.4%	25.9%
\$2,000 to \$2,499	3.6%	7.2%	7.0%	6.2%	17.3%
\$2,500 to \$2,999	0.2%	0.7%	0.9%	1.3%	8.1%
\$3,000 or more	0.0%	2.2%	0.6%	2.7%	8.1%
Median (dollars)	1,118	1,113	1,171	1,256	1,682
GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME (GRAPI)					
Occupied units paying rent (excluding units where GRAPI cannot be computed)					
Less than 15.0 percent	2.6%	11.4%	19.8%	14.9%	12.5%
15.0 to 19.9 percent	18.8%	9.5%	11.0%	11.4%	12.6%
20.0 to 24.9 percent	16.8%	14.8%	11.0%	14.0%	13.4%
25.0 to 29.9 percent	8.3%	12.9%	10.8%	12.2%	12.1%
30.0 to 34.9 percent	6.7%	7.1%	9.7%	9.3%	9.8%
35.0 percent or more	46.9%	44.3%	37.7%	38.3%	39.6%

Source: U.S. Census Bureau, 2023: ACS 5-Year Estimates Data Profile, Selected Housing Characteristics; TNDG.

Table II-3 below provide education-related data from the ACS. The table shows that College Place performs relatively strong in terms of educational attainment relative to the benchmark geographies for certain variables. For the 18 to 24 years age category, 63.3% of the City’s population has *some college or associate’s* degree, which is significantly higher than the benchmark geographies. The same finding applies to the 25 years and over age category as well: about 35.7% of the City is in the *Bachelor’s degree or higher* category, above the shares in benchmark counties, and just slightly below the statewide share (38.8%).

TABLE II-3. SELECTED EDUCATION CHARACTERISTICS FROM U.S. CENSUS BUREAU, COLLEGE PLACE, SELECTED COUNTIES, AND WASHINGTON 2023

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
AGE BY EDUCATIONAL ATTAINMENT					
Population 18 to 24 years					
Less than high school graduate	4.0%	8.4%	20.9%	15.7%	12.7%
High school graduate (includes equivalency)	26.4%	35.4%	37.4%	41.0%	35.5%
Some college or associate's degree	63.3%	49.0%	36.8%	35.2%	38.2%
Bachelor's degree or higher	6.2%	7.2%	4.9%	8.2%	13.6%
Population 25 years and over					
Less than 9th grade	3.7%	4.8%	14.0%	5.3%	3.4%
9th to 12th grade, no diploma	7.5%	5.9%	9.4%	4.8%	4.4%
High school graduate (includes equivalency)	16.2%	22.9%	26.7%	23.0%	21.7%
Some college, no degree	25.8%	24.5%	20.0%	23.1%	21.7%
Associate's degree	11.2%	11.7%	9.5%	10.8%	10.0%
Bachelor's degree	21.2%	16.8%	12.7%	20.1%	23.7%
Graduate or professional degree	14.5%	13.2%	7.7%	12.9%	15.1%
High school graduate or higher	88.8%	89.2%	76.6%	89.9%	92.2%
Bachelor's degree or higher	35.7%	30.1%	20.4%	33.0%	38.8%
POVERTY RATE FOR THE POPULATION 25 YEARS AND OVER FOR WHOM POVERTY STATUS IS DETERMINED BY EDUCATIONAL ATTAINMENT LEVEL					
Less than high school graduate	18.7%	24.2%	21.8%	27.4%	20.1%
High school graduate (includes equivalency)	6.3%	12.0%	10.4%	11.4%	11.9%
Some college or associate's degree	11.8%	7.3%	7.2%	8.6%	8.9%
Bachelor's degree or higher	3.5%	4.3%	5.0%	2.8%	4.1%
MEDIAN EARNINGS IN THE PAST 12 MONTHS (IN 2023 INFLATION-ADJUSTED DOLLARS)					
Population 25 years and over with earnings	49,250	48,516	47,142	54,556	59,987
Less than high school graduate	29,865	33,056	35,042	30,731	36,276
High school graduate (includes equivalency)	37,218	41,694	41,510	40,949	44,683
Some college or associate's degree	44,219	44,845	52,420	51,967	51,861

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
Bachelor's degree	61,369	62,097	79,269	78,975	78,782
Graduate or professional degree	85,357	81,402	93,433	95,384	104,701

Source: U.S. Census Bureau, 2023: ACS 5-Year Estimates Subject Tables, Educational Attainment; TNDG.

Table II-4 below provide selected household and age characteristics data from the ACS. As shown in the table, only Franklin County has average household and family sizes that are higher than College Place. In addition, compared to the benchmark geographies, College Place has a relatively high share of households with one or more person above 60 years old (47.1%). The data for selected age categories also show that College Place has a relatively older population than the benchmark geographies. For example, College Place has the highest share of its population between 65 and 74 years old (11.4%) compared to the benchmark geographies.

TABLE II-4. SELECTED HOUSEHOLD AND AGE CHARACTERISTICS FROM U.S. CENSUS BUREAU, COLLEGE PLACE, SELECTED COUNTIES, AND WASHINGTON, 2023.

VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
HOUSEHOLDS					
Total households	3,184	23,390	29,118	76,696	3,020,558
Average household size	2.69	2.45	3.26	2.71	2.51
FAMILIES					
Total families	1,995	14,704	23,124	52,929	1,928,170
Average family size	3.44	3.07	3.64	3.24	3.07
AGE OF OWN CHILDREN					
Households with own children of the householder under 18 years					
Under 6 years only	23.2%	16.5%	21.5%	18.4%	22.6%
Under 6 years and 6 to 17 years	23.2%	21.2%	24.6%	21.8%	19.9%
6 to 17 years only	53.5%	62.3%	53.9%	59.9%	57.5%
SELECTED HOUSEHOLDS BY TYPE					
Households with one or more people under 18 years	33.4%	28.2%	48.6%	34.0%	29.8%
Households with one or more people 60 years and over	47.1%	45.1%	30.5%	39.4%	39.0%
Households with one or more people 65 years and over	38.5%	35.5%	23.6%	29.3%	29.4%
Householder living alone	30.6%	31.4%	16.9%	25.4%	27.2%
65 years and over	13.6%	14.9%	7.6%	9.9%	10.6%
SELECTED AGE CATEGORIES (POPULATION)					
Under 5 years	5.9%	5.0%	8.3%	6.5%	5.7%
5 to 9 years	6.4%	5.5%	8.2%	7.9%	6.0%
10 to 14 years	5.7%	6.3%	9.7%	7.4%	6.3%
15 to 19 years	12.7%	8.6%	8.4%	7.0%	6.0%
20 to 24 years	13.3%	8.6%	7.1%	6.1%	6.2%
25 to 34 years	10.8%	12.0%	14.6%	13.4%	15.2%
35 to 44 years	11.8%	12.0%	14.0%	13.4%	14.1%
45 to 54 years	7.2%	10.7%	11.0%	11.1%	12.1%

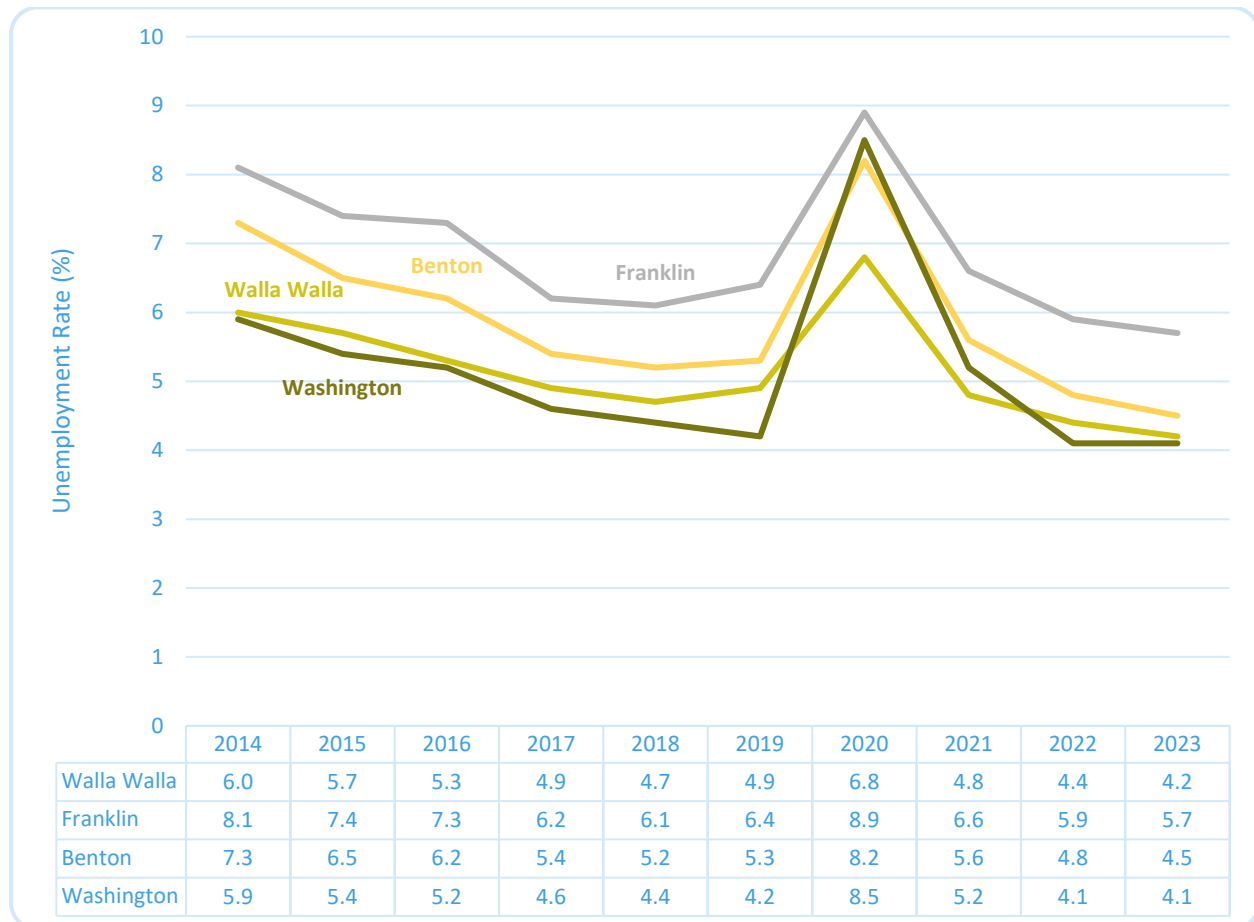
VARIABLE	COLLEGE PLACE	WALLA WALLA COUNTY	FRANKLIN COUNTY	BENTON COUNTY	WASHINGTON
55 to 59 years	2.0%	5.6%	4.5%	5.6%	6.0%
60 to 64 years	5.1%	6.3%	4.2%	6.1%	6.3%
65 to 74 years	11.4%	11.0%	6.5%	9.6%	10.0%
75 to 84 years	4.7%	5.3%	2.7%	4.2%	4.5%
85 years and over	3.0%	3.1%	0.8%	1.7%	1.8%

II. Workforce Analysis

Unemployment Rate Data

The BLS provides unemployment rate estimates through its Local Area Unemployment Statistics (LAUS) program. Figure II-1 below provides annual average unemployment rate estimates for Walla, Franklin and Benton Counties, and Washington for the 10-year period from 2014 to 2023. As shown in the figure and table below, all geographies experienced a similar trend in unemployment rates during this period. Due to the coronavirus pandemic, all evaluated geographies experienced a significant increase in unemployment rates. However, by 2023, the unemployment rates had fallen all the way back study period lows. Walla Walla County has the lowest unemployment rate (4.2%) of the three counties and is just 0.1 percentage point above the statewide unemployment rate (4.1%).

FIGURE II-1. UNEMPLOYMENT RATE ESTIMATES: WALLA WALLA, FRANKLIN, BENTON AND WASHINGTON (2014-23)



Source: Bureau of Labor Statistics (BLS), Local Area Unemployment Statistics (LAUS) program; TNDG.

Demographic and Employment Forecasts

Table II-2 shows demographic and employment forecasts for the College Place Area and Walla Walla County. The projections are provided by the Walla Walla Valley Metropolitan Planning Organization (WWVMPO) as part of the *2045 Plan, Walla Walla Valley Metropolitan and Regional Transportation Plan*. The table shows absolute and percentage growth rate projections (households and employment) for the 2019-2045 period.

Table II-10 shows that the College Place area¹ is projected to add 280 households, representing a growth rate of 19.3%. This growth is slightly below the rate of Walla Walla County, which is expected to experience a household growth rate of 22.6% over that period.

The College Place area is projected to add 280 employees over this period, representing a growth rate of 13.5%. The Retail, Food, Entertainment, and Hotels industry sectors are projected to account for about 74% of the total employment growth. This growth is slightly above the rate of Walla Walla County, which is expected to experience 10.8% employment growth rate over that period.

TABLE II-1. REGIONAL GROWTH PROJECTIONS: COLLEGE PLACE AREA AND WALLA COUNTY, 2019-2045

Area	2019	2045	2019-2045	
			# Change	% Change
College Place Area				
Households	3,839	4,579	740	19.3%
Industry Employment				
Education	571	591	20	3.5%
Manufacturing/Industrial	65	65	0	0.0%
Agriculture, Forestry, Extraction	19	19	0	0.0%
Retail, Food, Entertainment, Hotels	844	1,050	206	24.4%
Service	491	545	54	11.0%
Wholesale Trade, Transportation/Warehousing, Construction, Utilities	80	80	0	0.0%
Total	2,070	2,350	280	13.5%
Walla Walla County				
Households	22,877	28,058	5,181	22.6%
Industry Employment				
Education	3,064	3,281	217	7.1%
Manufacturing/Industrial	4,386	4,935	549	12.5%
Agriculture, Forestry, Extraction	3,296	3,306	10	0.3%
Retail, Food, Entertainment, Hotels	5,604	6,755	1,151	20.5%
Service	9,881	10,531	650	6.6%

¹ The demographic and employment forecasts are provided at the Traffic Analysis Zone (TAZ) level of geography. TAZ and incorporated city boundaries don't exactly align, but TAZs were selected to match the College Place City boundaries as close as possible

Wholesale Trade, Transportation/Warehousing, Construction, Utilities	2,329	2,849	520	22.3%
Total	28,560	31,657	3,097	10.8%

Source: 2045 Plan, Walla Walla Valley Metropolitan and Regional Transportation Plan, Travel Demand Model (TDM); TNDG.

III. Commercial/Industrial Real Estate Market Data

This section provides a summary of the retail, office, and industrial real estate markets in the City of College Place, compared to the benchmark Walla Walla County region.

Retail Market

Table III-1, below, shows key retail market indicators for the City of College Place. The table provides key market indicators for the most recent quarter (2024, Q4) and one year earlier. In addition, the table shows the typical range for these indicators along with the 10-year average. The retail market in the City is relatively healthy, with the existing overall vacancy rate estimated at 0.0%. Market asking rents and market sales prices are both up over the prior year.

TABLE III-1. KEY RETAIL MARKET INDICATORS, CITY OF COLLEGE PLACE

Time Period	Inventory	12 Mo Net Absorption SF	Vacancy Rate	Market Asking Rent / SF	Market Stales Price/SF	Market Cap Rate
Current	456,244	1,760	0.0%	\$17.50	\$140	8.2%
Prior Period	456,244	1,844	0.4%	\$16.97	\$136	8.1%
	+0%	-4.6%	-0.4%	+3.1%	+2.9%	+0.1%
Typical Range		(3,823) – 4,482	0.50%-1.16%	\$13.02-\$16.19	\$124-\$140	7.20%-8.04%
10 Yr Avg		642	1.06%	\$14.60	\$132	7.63%

Source: CoStar

Table III-2 provides the same data for Walla Walla County.

TABLE III-2. KEY RETAIL MARKET INDICATORS, WALLA WALLA COUNTY

Time Period	Inventory	12 Mo Net Absorption SF	Vacancy Rate	Market Asking Rent / SF	Market Stales Price/SF	Market Cap Rate
Current	2,860,185	26,455	3.2%	\$16.81	\$150	7.8%
Prior Period	2,860,185	(20,737)	4.0%	\$16.44	\$149	7.7%
	+0%	+227.6%	-0.8%	+2.3%	+0.7%	+0.1%
Typical Range		(49,491)- 59,289	1.72%-3.83%	\$13.01-\$15.73	\$127-\$147	7.32%-7.73%
10 Yr Avg		4,688	2.77%	\$14.37	\$137	7.53%

Source: CoStar

Office Market

Table III-3, below, shows key office market indicators for the City of College Place. The table provides key market indicators for the most recent quarter (2024, Q4) and one year earlier. In addition, the table shows the typical range for these indicators along with the 10-year average.

The office market in the City is relatively small, with about 7,900 square feet of total inventory.

TABLE III-3. KEY OFFICE MARKET INDICATORS, CITY OF COLLEGE PLACE

Time Period	Inventory	12 Mo Net Absorption SF	Vacancy Rate	Market Asking Rent / SF	Market Stales Price/SF	Market Cap Rate
Current	7,898	0	0.0%	\$22.15	\$456	8.3%
Prior Period	7,898	0	0.0%	\$21.83	\$464	8.1%
	+0%	-	+0.4%	+1.5%	-1.7%	+0.2%
Typical Range		--	--	\$17.64-\$21.25	\$388-\$477	6.63%-7.70%
10 Yr Avg		1,300	--	\$19.44	\$433	7.16%

Source: CoStar

'—' = No data available

Table III-4 provides the same data for Wall Walla County.

TABLE III-4. KEY OFFICE MARKET INDICATORS, WALLA WALLA COUNTY

Time Period	Inventory	12 Mo Net Absorption SF	Vacancy Rate	Market Asking Rent / SF	Market Stales Price/SF	Market Cap Rate
Current	796,109	(4,174)	2.6%	\$21.31	\$172	9.7%
Prior Period	796,109	4,207	2.1%	\$21.01	\$177	9.3%
	+0%	-199.2%	+0.5%	+1.4%	-2.8%	+0.4%
Typical Range		(9,922)-21,590	0.92%-6.40%	\$16.94-\$20.42	\$168-\$193	7.50%-8.85%
10 Yr Avg		5,860	3.66%	\$18.88	\$180	8.17%

Source: CoStar

Industrial Market

Table III-5, below, shows key industrial market indicators for the City of College Place. The table provides key market indicators for the most recent quarter (2024, Q4) and one year earlier. In addition, the table shows the typical range for these indicators along with the 10-year average.

The industrial market in the City is relatively small, with only 1,200 square feet of total inventory.

TABLE III-5. KEY INDUSTRIAL MARKET INDICATORS, CITY OF COLLEGE PLACE

Time Period	Inventory	12 Mo Net Absorption SF	Vacancy Rate	Market Asking Rent / SF	Market Stales Price/SF	Market Cap Rate
Current	1,200	0	0.0%	\$7.12	\$73	9.2%
Prior Period	1,200	0	0.0%	\$7.17	\$74	8.8%
	+0%	-	+0.4%	-0.7%	-1.4%	+0.4%
Typical Range		--	--	\$5.04-\$6.84	\$50-\$73	7.64%-8.64%
10 Yr Avg		--	--	\$5.94	\$62	8.14%

Source: CoStar

'—' = No data available

Table III-6 provides the same data for Wall Walla County.

TABLE III-6. KEY INDUSTRIAL MARKET INDICATORS, WALLA WALLA COUNTY

Time Period	Inventory	12 Mo Net Absorption SF	Vacancy Rate	Market Asking Rent / SF	Market Stales Price/SF	Market Cap Rate
Current	4,218,423	40,980	4.9%	\$8.46	\$135	7.2%
Prior Period	4,218,423	395,573	5.9%	\$8.50	\$136	6.9%
	+0%	-89.6%	-1.0%	-0.5%	-0.7%	+0.3%
Typical Range		(9,926)-190,946	3.40%-9.07%	\$8.25-\$9.40	\$135-\$158	6.43%-7.19%
10 Yr Avg		90,778	6.23%	\$8.82	\$146	6.81%

Source: CoStar

IV. Industry Cluster Analysis

This chapter presents an initial overview of industry “clusters” that are prominent in College Place and the surrounding region. A more detailed target industry/cluster analysis will be provided as a separate report during Phase 2 of the CEDS process.

Definitions and Focus of Local/Regional Industry Clusters Analysis

The clusters analyzed in this study are based on definitions (i.e., industry groupings) from the U.S. Cluster Mapping Project (Cluster Mapping Project), an economic development initiative led by Harvard Business School’s Institute for Strategy and Competitiveness.

In accordance with the North American Industry Classification System (NAICS), the U.S. economy includes a total of approximately 1,100 individual industry sectors. The U.S. Cluster Mapping Project assigns each of these sectors to unique clusters, which are based on linkages through supply-chain relationships, as well as commonalities in terms of workforce requirements and infrastructure needs. Nationally, the Cluster Mapping Project recognizes a total of 67 clusters, with 16 classified as “local” clusters and 51 classified as “traded” clusters.

Total current (2023) employment in the College Place area (“College Place”) is estimated at 3,519². The local clusters currently represent a total of 2,216 jobs in College Place, while the traded clusters account for 1,286 jobs. Non-cluster employment totals 17 jobs³.

Whereas local and traded clusters are both critically important components of a balanced economy, they have distinct roles and characteristics, and these distinctions can be helpful in terms of planning economic development programs. Some of these distinctions are summarized as follows:

- **Local clusters** typically form the core of a region’s economy; they primarily provide goods and services for the local (resident) population. They tend to account for the majority of jobs in a region (in the case of College Place, local clusters represent about 63% of total jobs), and support a high quality of life by ensuring the availability of a diverse range of goods and services. In College Place, important local clusters include *Local Health Services*, *Local Education and Training* and *Local Government*

² All employment data used in this analysis are from Lightcast – a private data/modeling firm nationally regarded for its ability to provide detailed (6-digit NAICS code) industry employment estimates for small areas of geography (zip codes). For purposes of this analysis, the College Place area is defined by zip code 99324.

³ Lightcast and TNDG have made some adjustments to the cluster definitions to account for changes in the NAICS industry structure between 2012, 2017, and 2022 NAICS industry definitions. NAICS code 814110, Private Households, is not assigned to any cluster.

Services. These clusters account for more than one-fourth (27.4%) of College Place’s total jobs.

- **Traded clusters** are “export-oriented” in the sense that they include industries that are engaged in producing goods and services for end customers outside the region. Traded clusters account for about 37% of the jobs in College Place, and are especially important from an economic development perspective given that they tend to have higher wages and higher “multiplier impacts” compared to local clusters. That is, they have a strong potential to inject new dollars into the local economy and thereby serve as “drivers” for broader economic growth. In College Place, the bulk of traded cluster employment is in the *Education and Knowledge Creation* cluster, accounting for about 83% of total traded cluster employment.

As highlighted in the following bullet points, Tables IV-1 to IV-11 provide summary cluster employment data for the following geographies: College Place, Walla Walla County, Franklin County, Benton County and Washington State.

- Table IV-1 shows estimated existing (2023) employment by cluster
- Table IV-2 shows the location quotients (compared to the U.S. benchmark) in 2023. The location quotient (LQ) measures how concentrated/important an industry cluster is in a region compared to national benchmarks. An LQ value greater than 1.0 indicates that a cluster is more concentrated in the region than it is nationally. This is generally regarded as an indication that the region has a comparative advantage relative to a particular cluster, although (especially for local clusters) an LQ below 1.0 can indicate a potential growth opportunity.
- Table IV-3 shows existing wages by cluster
- Table IV-4 shows cluster job growth for the most recent 10-year period between 2013 and 2023
- Table IV-5 shows cluster job growth in percentage terms for the most recent 10-year period between 2013 and 2023
- Table IV-6 shows 10-year projected job growth, 2023 to 2033
- Table IV-7 shows 10-year projected job growth, 2023 to 2033, in percentage terms
- Tables IV-8 to IV-11 provide a summary of 2013-2023 growth performance based on a “shift-share” analysis. The “shift-share” analysis for each cluster estimates an “expected” job change based on national trends. If College Place (or benchmark region) has higher job growth (or experiences less severe job losses) compared to the expected change, it indicates that the local area (or benchmark region) has performed better than national trends. In this case, the *local share* component is positive. Conversely, if College Place or benchmark regions have less job growth (or experience more severe job losses) compared to the expected change, it indicates

that the specific region has performed worse than national trends. In this case, the *local share* component is negative.

Based on a preliminary review of the data in the above tables, the City and surrounding regions have a strong competitive advantage in the following *traded clusters*:

- Education and Knowledge Creation
- Agricultural Inputs and Services
- Food Processing and Manufacturing
- Forestry
- Livestock Processing

Local Clusters with a strong competitive advantage include the following:

- Local Education and Training
- Local Federal Government Services
- Local Government Services
- Local Retailing of Clothing and General Merchandise
- Local State Government Services

Table IV-1
Cluster Employment by Region, 2023

Cluster	College Place	Walla Walla	Franklin	Benton	Washington
Aerospace Vehicles and Defense	0	0	11	3	78,927
Agricultural Inputs and Services	19	3,943	5,979	8,127	99,066
Apparel	0	59	3	9	2,024
Automotive	0	7	0	19	6,580
Biopharmaceuticals	0	0	0	48	4,017
Business Services	17	454	474	5,354	330,220
Coal Mining	0	0	0	0	40
Communications Equipment and Services	0	50	10	52	9,444
Construction Products and Services	1	63	89	1,772	17,173
Distribution and Electronic Commerce	3	744	2,347	1,547	134,886
Downstream Chemical Products	0	0	0	6	1,345
Downstream Metal Products	0	8	50	32	6,082
Education and Knowledge Creation	1,065	2,732	826	5,613	134,003
Electric Power Generation and Transmission	0	11	0	29	930
Environmental Services	0	0	0	2,465	5,345
Financial Services	36	149	155	436	33,021
Fishing and Fishing Products	0	6	9	7	7,158
Food Processing and Manufacturing	4	1,131	3,692	3,083	35,720
Footwear	0	0	0	3	278
Forestry	2	29	3	71	5,769
Furniture	0	21	1	34	5,655
Hospitality and Tourism	75	362	632	1,161	69,400
Information Technology and Analytical Instruments	9	108	107	330	101,852
Insurance Services	9	29	30	188	21,549
Jewelry and Precious Metals	0	0	0	1	234
Leather and Related Products	0	0	0	12	1,120
Lighting and Electrical Equipment	0	0	0	5	5,235
Livestock Processing	15	1,548	45	8	6,320
Marketing, Design, and Publishing	10	135	78	433	59,654
Medical Devices	0	0	232	76	2,587
Metal Mining	0	0	0	0	189
Metalworking Technology	0	20	6	25	6,093
Music and Sound Recording	1	3	0	3	653
Nonmetal Mining	0	6	51	0	1,922
Oil and Gas Production and Transportation	0	0	7	1	2,845
Paper and Packaging	1	296	78	1	7,508
Performing Arts	0	183	105	218	18,904
Plastics	1	45	0	4	7,499
Printing Services	2	14	32	62	5,274
Production Technology and Heavy Machinery	0	620	63	136	12,642

Recreational and Small Electric Goods	0	8	1	25	6,440
Textile Manufacturing	0	0	0	2	1,132
Tobacco	0	0	0	0	7
Trailers, Motor Homes, and Appliances	0	0	0	0	320
Transportation and Logistics	10	305	728	644	57,456
Upstream Chemical Products	0	8	0	575	1,767
Upstream Metal Manufacturing	0	23	0	255	3,457
Video Production and Distribution	2	3	5	17	3,903
Vulcanized and Fired Materials	0	3	156	7	3,105
Water Transportation	0	37	11	6	12,341
Wood Products	0	40	26	15	14,015
Local Commercial Services	51	674	1,057	4,061	194,976
Local Community and Civic Organizations	42	1,583	1,572	4,696	177,728
Local Education and Training	334	1,750	3,677	6,738	209,207
Local Entertainment and Media	11	209	50	819	23,384
Local Federal Government Services	218	2,014	738	1,213	147,958
Local Financial Services	69	426	356	1,804	60,856
Local Food and Beverage Processing and Distribution	80	790	1,254	2,134	104,755
Local Government Services	287	931	1,317	3,902	164,563
Local Health Services	344	3,341	2,010	12,093	387,378
Local Hospitality Establishments	101	2,331	2,162	9,374	295,108
Local Household Goods and Services	25	446	824	1,622	68,181
Local Industrial Products and Services	1	55	36	139	8,495
Local Logistical Services	14	173	1,219	901	60,370
Local Motor Vehicle Products and Services	90	568	1,700	2,728	93,992
Local Personal Services (Non-Medical)	49	637	983	2,951	115,730
Local Real Estate, Construction, and Development	216	2,068	3,970	10,121	363,966
Local Retailing of Clothing and General Merchandise	168	766	816	3,922	103,849
Local State Government Services	116	1,312	881	766	65,265
Local Utilities	2	152	141	4,328	22,046
Non-Cluster	17	215	57	382	37,189
Total	3,519	33,645	40,863	107,612	4,058,100
Traded Total	1,286	13,204	16,042	32,919	1,353,103
Local Total	2,216	20,226	24,764	74,311	2,667,808

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-2
Cluster Location Quotients by Region, 2023

Cluster	College Place	Walla Walla	Franklin	Benton	Washington
Aerospace Vehicles and Defense	0.00	0.00	0.07	0.01	5.00
Agricultural Inputs and Services	0.48	10.63	13.27	6.85	2.21
Apparel	0.15	2.34	0.09	0.11	0.67
Automotive	0.01	0.03	0.00	0.03	0.26
Biopharmaceuticals	0.01	0.00	0.00	0.22	0.49
Business Services	0.07	0.21	0.18	0.76	1.24
Coal Mining	0.00	0.00	0.00	0.00	0.04
Communications Equipment and Services	0.02	1.07	0.18	0.35	1.67
Construction Products and Services	0.06	0.32	0.37	2.81	0.72
Distribution and Electronic Commerce	0.02	0.59	1.53	0.38	0.88
Downstream Chemical Products	0.01	0.01	0.00	0.04	0.20
Downstream Metal Products	0.02	0.09	0.43	0.10	0.53
Education and Knowledge Creation	7.51	2.02	0.50	1.30	0.82
Electric Power Generation and Transmission	0.00	0.32	0.00	0.26	0.22
Environmental Services	0.00	0.00	0.00	26.13	1.50
Financial Services	0.81	0.35	0.30	0.32	0.64
Fishing and Fishing Products	0.00	0.49	0.60	0.18	4.92
Food Processing and Manufacturing	0.16	4.41	11.85	3.76	1.15
Footwear	0.00	0.00	0.00	0.32	0.68
Forestry	0.95	1.54	0.11	1.17	2.53
Furniture	0.00	0.29	0.01	0.15	0.64
Hospitality and Tourism	1.10	0.56	0.80	0.56	0.89
Information Technology and Analytical Instruments	0.29	0.35	0.29	0.34	2.75
Insurance Services	0.27	0.10	0.08	0.19	0.59
Jewelry and Precious Metals	0.00	0.00	0.00	0.07	0.37
Leather and Related Products	0.00	0.00	0.00	0.48	1.20
Lighting and Electrical Equipment	0.00	0.00	0.00	0.02	0.62
Livestock Processing	1.30	13.89	0.34	0.02	0.47
Marketing, Design, and Publishing	0.26	0.35	0.17	0.35	1.28
Medical Devices	0.00	0.00	3.35	0.42	0.38
Metal Mining	0.00	0.00	0.00	0.00	0.16
Metalworking Technology	0.03	0.22	0.05	0.09	0.56
Music and Sound Recording	1.32	0.32	0.00	0.12	0.63
Nonmetal Mining	0.21	0.27	1.98	0.00	0.75
Oil and Gas Production and Transportation	0.00	0.00	0.05	0.00	0.21
Paper and Packaging	0.19	4.14	0.89	0.00	0.87
Performing Arts	0.03	1.21	0.57	0.45	1.04
Plastics	0.04	0.34	0.00	0.01	0.47
Printing Services	0.21	0.18	0.34	0.25	0.56
Production Technology and Heavy Machinery	0.02	3.10	0.26	0.21	0.52

Recreational and Small Electric Goods	0.03	0.19	0.02	0.19	1.33
Textile Manufacturing	0.00	0.00	0.00	0.01	0.27
Tobacco	0.00	0.00	0.00	0.00	0.03
Trailers, Motor Homes, and Appliances	0.00	0.00	0.00	0.00	0.08
Transportation and Logistics	0.21	0.66	1.30	0.44	1.03
Upstream Chemical Products	0.10	0.24	0.00	5.24	0.43
Upstream Metal Manufacturing	0.03	0.30	0.00	1.03	0.37
Video Production and Distribution	0.29	0.05	0.07	0.09	0.53
Vulcanized and Fired Materials	0.00	0.06	2.58	0.04	0.52
Water Transportation	0.01	0.59	0.14	0.03	1.61
Wood Products	0.05	0.49	0.26	0.06	1.43
Local Commercial Services	0.25	0.35	0.45	0.65	0.83
Local Community and Civic Organizations	0.34	1.33	1.09	1.24	1.24
Local Education and Training	1.78	0.98	1.69	1.18	0.97
Local Entertainment and Media	0.57	1.15	0.23	1.41	1.07
Local Federal Government Services	2.17	2.09	0.63	0.39	1.28
Local Financial Services	0.95	0.62	0.42	0.82	0.73
Local Food and Beverage Processing and Distribution	0.87	0.90	1.18	0.76	0.99
Local Government Services	2.43	0.83	0.96	1.08	1.21
Local Health Services	0.86	0.88	0.43	0.99	0.84
Local Hospitality Establishments	0.35	0.86	0.65	1.08	0.90
Local Household Goods and Services	0.41	0.78	1.19	0.89	0.99
Local Industrial Products and Services	0.06	0.54	0.29	0.43	0.69
Local Logistical Services	0.21	0.27	1.58	0.44	0.79
Local Motor Vehicle Products and Services	0.89	0.58	1.43	0.87	0.80
Local Personal Services (Non-Medical)	0.50	0.69	0.88	1.00	1.04
Local Real Estate, Construction, and Development	0.78	0.78	1.23	1.19	1.13
Local Retailing of Clothing and General Merchandise	1.73	0.82	0.72	1.32	0.93
Local State Government Services	2.53	2.99	1.65	0.54	1.23
Local Utilities	0.07	0.71	0.55	6.34	0.86
Non-Cluster	0.54	0.72	0.16	0.40	1.04
Traded	1.16	1.25	1.25	0.97	1.06
Local	0.93	0.89	0.90	1.02	0.97

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-3
Cluster Wages by Region, 2023

Cluster	College Place	Walla Walla	Franklin	Benton	Washington
Aerospace Vehicles and Defense			57,335	57,335	163,343
Agricultural Inputs and Services	49,442	46,616	51,327	45,820	49,099
Apparel	69,849	69,976	41,516	22,341	63,123
Automotive	68,239	84,597		52,539	98,651
Biopharmaceuticals	95,576	95,576		209,063	148,648
Business Services	57,017	96,726	74,997	124,553	190,153
Coal Mining					145,540
Communications Equipment and Services	79,965	80,683	73,204	130,909	255,787
Construction Products and Services	64,594	70,812	87,337	136,891	126,296
Distribution and Electronic Commerce	75,806	69,948	91,884	87,691	116,127
Downstream Chemical Products	81,759	81,759		21,160	93,415
Downstream Metal Products	58,086	58,045	84,974	72,347	86,296
Education and Knowledge Creation	29,725	40,767	74,948	127,194	108,306
Electric Power Generation and Transmission		166,209		201,612	199,227
Environmental Services				145,958	133,969
Financial Services	102,365	102,259	101,049	152,814	198,358
Fishing and Fishing Products		79,900	79,900	79,900	112,959
Food Processing and Manufacturing	64,706	67,520	70,900	75,342	73,176
Footwear				16,657	49,127
Forestry	67,304	63,248	50,157	71,383	82,930
Furniture	56,489	53,826	34,501	44,049	65,190
Hospitality and Tourism	39,501	40,491	38,926	50,621	77,226
Information Technology and Analytical Instruments	219,027	220,475	105,828	119,971	301,491
Insurance Services	95,116	93,829	128,343	94,598	125,690
Jewelry and Precious Metals				34,017	50,920
Leather and Related Products				31,523	61,580
Lighting and Electrical Equipment				159,209	114,730
Livestock Processing	69,892	69,850	61,848	64,078	69,053
Marketing, Design, and Publishing	57,287	64,292	66,229	71,064	250,525
Medical Devices			95,084	93,688	124,496
Metal Mining					148,487
Metalworking Technology	54,628	106,987	83,941	70,164	93,001
Music and Sound Recording	26,775	26,775		26,775	69,914
Nonmetal Mining	81,274	68,962	69,496	93,935	106,762
Oil and Gas Production and Transportation			66,678	200,865	231,070
Paper and Packaging	113,653	113,653	85,975	51,497	111,176
Performing Arts	30,982	33,059	105,658	23,928	38,076
Plastics	77,861	76,845		63,814	82,534
Printing Services	39,416	39,263	48,445	37,956	72,101
Production Technology and Heavy Machinery	102,981	108,468	82,970	90,788	98,356

Recreational and Small Electric Goods	39,538	45,294	39,139	43,640	128,401
Textile Manufacturing				29,766	71,857
Tobacco					109,159
Trailers, Motor Homes, and Appliances					61,594
Transportation and Logistics	64,549	66,950	82,637	82,484	108,499
Upstream Chemical Products	66,529	66,529		145,581	126,615
Upstream Metal Manufacturing	105,733	108,203		91,589	108,395
Video Production and Distribution	41,438	41,438	53,633	46,109	87,984
Vulcanized and Fired Materials		12,263	66,937	21,392	82,779
Water Transportation	87,053	86,768	126,630	77,841	134,938
Wood Products	82,956	84,357	55,568	46,218	82,025
Local Commercial Services	50,560	52,524	60,871	70,393	80,049
Local Community and Civic Organizations	39,153	38,674	33,008	36,295	45,215
Local Education and Training	71,256	70,187	82,443	83,782	86,217
Local Entertainment and Media	51,767	39,058	27,983	34,812	56,650
Local Federal Government Services	86,356	85,225	95,549	107,881	102,256
Local Financial Services	72,544	80,453	69,865	92,563	115,456
Local Food and Beverage Processing and Distribution	38,374	42,326	44,357	44,566	53,761
Local Government Services	90,960	90,960	111,941	137,467	119,869
Local Health Services	69,815	81,842	82,691	83,769	97,318
Local Hospitality Establishments	30,208	30,305	30,205	30,271	35,641
Local Household Goods and Services	43,202	40,194	47,527	45,205	59,837
Local Industrial Products and Services	50,062	53,157	76,672	59,352	81,111
Local Logistical Services	103,393	57,479	67,637	63,108	73,229
Local Motor Vehicle Products and Services	66,105	56,283	68,254	58,784	72,640
Local Personal Services (Non-Medical)	38,062	38,384	37,183	46,413	48,608
Local Real Estate, Construction, and Development	52,299	66,736	71,531	78,272	89,233
Local Retailing of Clothing and General Merchandise	32,030	35,461	38,815	39,194	47,912
Local State Government Services	122,711	122,711	116,399	109,543	116,141
Local Utilities	66,894	153,080	106,137	143,307	130,992
Non-Cluster	N/A	N/A	N/A	N/A	N/A
Total	56,180	63,208	66,910	73,731	101,003
Traded Total	36,366	60,888	67,600	96,147	148,334
Local Total	67,724	65,875	67,069	72,146	78,079

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-4
Cluster Employment Growth by Region, 2013-2023

Cluster	College Place	Walla Walla	Franklin	Benton	Washington
Aerospace Vehicles and Defense	0	0	10	(1)	(18,876)
Agricultural Inputs and Services	(13)	(348)	(1,229)	1,843	(1,097)
Apparel	(0)	49	1	4	(492)
Automotive	0	(21)	(17)	(36)	420
Biopharmaceuticals	0	0	0	43	1,513
Business Services	(11)	167	(124)	(634)	158,630
Coal Mining	0	0	0	0	(4)
Communications Equipment and Services	(0)	7	(24)	(61)	(2,762)
Construction Products and Services	(0)	8	31	1,216	3,049
Distribution and Electronic Commerce	(4)	205	657	355	25,331
Downstream Chemical Products	0	(0)	(1)	6	(23)
Downstream Metal Products	(0)	(106)	11	(16)	442
Education and Knowledge Creation	(115)	(659)	(311)	272	(5,205)
Electric Power Generation and Transmission	0	(22)	0	29	457
Environmental Services	0	0	(1)	1,070	1,351
Financial Services	29	73	62	116	2,542
Fishing and Fishing Products	0	(7)	3	(12)	(3,773)
Food Processing and Manufacturing	(7)	487	1,052	662	9,061
Footwear	0	0	0	3	81
Forestry	2	11	(2)	66	(1,283)
Furniture	(0)	4	(2)	(6)	(147)
Hospitality and Tourism	49	(62)	90	142	7,521
Information Technology and Analytical Instruments	9	108	37	135	30,467
Insurance Services	(1)	(20)	28	19	(3,498)
Jewelry and Precious Metals	0	0	0	1	(96)
Leather and Related Products	0	(1)	0	9	(152)
Lighting and Electrical Equipment	0	0	0	(11)	706
Livestock Processing	(1)	337	27	1	979
Marketing, Design, and Publishing	(1)	(64)	22	(66)	22,159
Medical Devices	0	0	16	24	(176)
Metal Mining	0	0	0	0	(249)
Metalworking Technology	(1)	(4)	5	14	(434)
Music and Sound Recording	1	2	0	(0)	151
Nonmetal Mining	(1)	4	24	(1)	304
Oil and Gas Production and Transportation	0	0	(34)	(10)	228
Paper and Packaging	0	(149)	59	(9)	(739)
Performing Arts	(3)	105	84	106	6,778
Plastics	(0)	8	0	(90)	(1,275)
Printing Services	(4)	(71)	23	(16)	(1,215)
Production Technology and Heavy Machinery	(0)	(81)	37	96	(187)

Recreational and Small Electric Goods	(0)	(43)	(2)	11	(17)
Textile Manufacturing	0	(1)	(2)	(16)	(346)
Tobacco	0	0	0	(0)	4
Trailers, Motor Homes, and Appliances	0	0	0	0	(138)
Transportation and Logistics	4	49	188	190	14,108
Upstream Chemical Products	0	(0)	(14)	(115)	52
Upstream Metal Manufacturing	0	0	0	106	(937)
Video Production and Distribution	0	0	(0)	7	1,243
Vulcanized and Fired Materials	0	(4)	137	1	(699)
Water Transportation	0	35	9	4	(2,122)
Wood Products	0	25	(40)	(22)	601
Local Commercial Services	13	6	42	803	32,704
Local Community and Civic Organizations	7	(38)	222	1,521	26,269
Local Education and Training	(37)	42	889	1,698	25,712
Local Entertainment and Media	(5)	20	(10)	108	(4,996)
Local Federal Government Services	136	671	20	(64)	(4,319)
Local Financial Services	42	(245)	76	128	9,676
Local Food and Beverage Processing and Distribution	22	84	235	702	14,029
Local Government Services	(62)	(38)	95	(507)	18,139
Local Health Services	13	(12)	371	2,815	56,242
Local Hospitality Establishments	88	809	524	2,380	49,502
Local Household Goods and Services	(7)	48	287	37	2,180
Local Industrial Products and Services	(2)	(29)	(52)	2	(1,406)
Local Logistical Services	2	(7)	476	364	20,137
Local Motor Vehicle Products and Services	8	3	212	577	6,411
Local Personal Services (Non-Medical)	(10)	(68)	(29)	787	19,684
Local Real Estate, Construction, and Development	61	669	1,577	3,425	108,375
Local Retailing of Clothing and General Merchandise	(35)	(66)	47	223	(2,187)
Local State Government Services	14	101	(22)	227	8,069
Local Utilities	1	6	70	(487)	(760)
Non-Cluster	(11)	(128)	(43)	(14)	(3,715)
Total	171	1,849	5,797	20,154	621,984
Traded Total	(65)	21	811	5,427	242,238
Local Total	247	1,956	5,029	14,741	383,461

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-5
Cluster Employment Growth by Region (%), 2013-2023

Cluster	College Place	Walla Walla	Franklin	Benton	Washington
Aerospace Vehicles and Defense	--	--	657.6%	-23.1%	-19.3%
Agricultural Inputs and Services	-40.5%	-8.1%	-17.0%	29.3%	-1.1%
Apparel	-23.2%	522.7%	81.1%	77.3%	-19.6%
Automotive	689.0%	-75.7%	-100.0%	-65.5%	6.8%
Biopharmaceuticals	UND	UND	--	741.7%	60.5%
Business Services	-38.8%	58.1%	-20.7%	-10.6%	92.4%
Coal Mining	--	--	--	--	-9.8%
Communications Equipment and Services	-53.0%	16.7%	-70.7%	-53.9%	-22.6%
Construction Products and Services	-0.5%	13.7%	53.9%	218.7%	21.6%
Distribution and Electronic Commerce	-55.7%	38.1%	38.9%	29.7%	23.1%
Downstream Chemical Products	13.5%	-15.9%	-100.0%	UND	-1.7%
Downstream Metal Products	-63.2%	-92.6%	28.5%	-33.3%	7.8%
Education and Knowledge Creation	-9.8%	-19.4%	-27.4%	5.1%	-3.7%
Electric Power Generation and Transmission	--	-65.6%	--	UND	96.6%
Environmental Services	--	--	-100.0%	76.7%	33.8%
Financial Services	379.4%	95.9%	66.3%	36.0%	8.3%
Fishing and Fishing Products	--	-54.7%	58.8%	-63.1%	-34.5%
Food Processing and Manufacturing	-61.8%	75.7%	39.9%	27.3%	34.0%
Footwear	--	--	--	UND	40.9%
Forestry	UND	56.8%	-44.7%	1370.7%	-18.2%
Furniture	-77.0%	25.9%	-66.6%	-14.7%	-2.5%
Hospitality and Tourism	194.3%	-14.6%	16.6%	14.0%	12.2%
Information Technology and Analytical Instruments	UND	UND	51.4%	68.8%	42.7%
Insurance Services	-12.2%	-40.3%	1621.8%	11.3%	-14.0%
Jewelry and Precious Metals	--	--	--	81.1%	-29.0%
Leather and Related Products	--	-100.0%	--	309.9%	-11.9%
Lighting and Electrical Equipment	--	--	--	-70.5%	15.6%
Livestock Processing	-3.3%	27.9%	142.1%	9.1%	18.3%
Marketing, Design, and Publishing	-4.9%	-32.0%	39.0%	-13.2%	59.1%
Medical Devices	--	--	7.6%	46.0%	-6.4%
Metal Mining	--	--	--	--	-56.9%
Metalworking Technology	-62.8%	-17.8%	1409.5%	130.7%	-6.7%
Music and Sound Recording	130.9%	130.9%	--	-11.1%	30.1%
Nonmetal Mining	-63.4%	162.9%	90.1%	-78.3%	18.8%
Oil and Gas Production and Transportation	--	--	-82.8%	-93.8%	8.7%
Paper and Packaging	34.3%	-33.5%	316.8%	-93.8%	-9.0%
Performing Arts	-85.4%	135.0%	388.8%	95.3%	55.9%
Plastics	-4.9%	21.6%	--	-96.0%	-14.5%
Printing Services	-69.6%	-83.6%	246.7%	-20.7%	-18.7%
Production Technology and Heavy Machinery	-7.2%	-11.6%	147.6%	241.0%	-1.5%

Recreational and Small Electric Goods	-42.3%	-85.2%	-71.0%	78.8%	-0.3%
Textile Manufacturing	--	-100.0%	-100.0%	-90.8%	-23.4%
Tobacco	--	--	--	-100.0%	150.4%
Trailers, Motor Homes, and Appliances	--	--	--	--	-30.1%
Transportation and Logistics	66.2%	19.2%	34.9%	42.0%	32.5%
Upstream Chemical Products	36.6%	-3.4%	-100.0%	-16.7%	3.0%
Upstream Metal Manufacturing	44.3%	0.8%	--	70.9%	-21.3%
Video Production and Distribution	16.0%	12.5%	-3.7%	67.1%	46.7%
Vulcanized and Fired Materials	--	-56.2%	740.9%	9.6%	-18.4%
Water Transportation	UND	1907.3%	545.8%	195.8%	-14.7%
Wood Products	17.8%	163.1%	-60.7%	-59.6%	4.5%
Local Commercial Services	33.6%	0.8%	4.1%	24.7%	20.2%
Local Community and Civic Organizations	19.4%	-2.3%	16.4%	47.9%	17.3%
Local Education and Training	-9.9%	2.5%	31.9%	33.7%	14.0%
Local Entertainment and Media	-31.6%	10.5%	-16.8%	15.2%	-17.6%
Local Federal Government Services	166.2%	50.0%	2.8%	-5.0%	-2.8%
Local Financial Services	158.3%	-36.5%	27.0%	7.6%	18.9%
Local Food and Beverage Processing and Distribution	37.7%	11.8%	23.1%	49.1%	15.5%
Local Government Services	-17.8%	-3.9%	7.8%	-11.5%	12.4%
Local Health Services	3.9%	-0.4%	22.6%	30.3%	17.0%
Local Hospitality Establishments	701.7%	53.2%	32.0%	34.0%	20.2%
Local Household Goods and Services	-21.3%	12.1%	53.3%	2.4%	3.3%
Local Industrial Products and Services	-77.8%	-34.9%	-59.3%	1.5%	-14.2%
Local Logistical Services	14.1%	-4.0%	64.1%	67.8%	50.1%
Local Motor Vehicle Products and Services	9.4%	0.6%	14.3%	26.9%	7.3%
Local Personal Services (Non-Medical)	-17.2%	-9.7%	-2.9%	36.4%	20.5%
Local Real Estate, Construction, and Development	39.1%	47.8%	65.9%	51.2%	42.4%
Local Retailing of Clothing and General Merchandise	-17.4%	-7.9%	6.2%	6.0%	-2.1%
Local State Government Services	13.4%	8.4%	-2.4%	42.2%	14.1%
Local Utilities	87.4%	3.8%	99.1%	-10.1%	-3.3%
Non-Cluster	-38.9%	-37.2%	-42.8%	-3.5%	-9.1%
Total	5.1%	5.8%	16.5%	23.0%	18.1%
Traded Total	-4.8%	0.2%	5.3%	19.7%	21.8%
Local Total	12.6%	10.7%	25.5%	24.7%	16.8%

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-6
Cluster Employment Growth by Region, 2023-2033

Cluster	College Place	Walla Walla	Franklin	Benton	Washington
Aerospace Vehicles and Defense	0	0	6	2	2,204
Agricultural Inputs and Services	2	636	(618)	2,874	5,632
Apparel	0	(1)	1	1	(299)
Automotive	0	4	0	(9)	999
Biopharmaceuticals	0	0	0	(27)	1,155
Business Services	5	164	171	271	157,777
Coal Mining	0	0	0	0	(22)
Communications Equipment and Services	0	50	1	24	(1,416)
Construction Products and Services	1	27	41	664	757
Distribution and Electronic Commerce	1	177	432	298	20,597
Downstream Chemical Products	0	0	0	4	186
Downstream Metal Products	(0)	(2)	9	4	448
Education and Knowledge Creation	87	53	(4)	(11)	1,231
Electric Power Generation and Transmission	0	(9)	0	29	223
Environmental Services	0	0	0	223	518
Financial Services	8	36	109	84	3,056
Fishing and Fishing Products	0	(4)	2	(4)	(1,695)
Food Processing and Manufacturing	2	330	1,271	290	5,746
Footwear	0	0	0	3	58
Forestry	0	8	1	75	(398)
Furniture	0	8	(0)	4	(497)
Hospitality and Tourism	12	40	53	214	9,940
Information Technology and Analytical Instruments	7	49	68	203	15,596
Insurance Services	(3)	(7)	24	(5)	(347)
Jewelry and Precious Metals	0	0	0	0	(20)
Leather and Related Products	0	0	0	1	(37)
Lighting and Electrical Equipment	0	0	0	1	1,164
Livestock Processing	5	734	(40)	4	1,150
Marketing, Design, and Publishing	0	31	27	32	11,485
Medical Devices	0	0	197	5	241
Metal Mining	0	0	0	0	(2)
Metalworking Technology	0	4	4	(3)	554
Music and Sound Recording	1	1	0	0	101
Nonmetal Mining	0	5	(8)	0	118
Oil and Gas Production and Transportation	0	0	1	(0)	428
Paper and Packaging	0	(5)	(15)	0	(400)
Performing Arts	0	55	55	62	4,145
Plastics	(0)	3	0	(3)	(488)
Printing Services	(0)	8	29	20	(882)
Production Technology and Heavy Machinery	0	(9)	55	72	1,237

Recreational and Small Electric Goods	0	(3)	1	4	(211)
Textile Manufacturing	0	0	0	(0)	231
Tobacco	0	0	0	0	3
Trailers, Motor Homes, and Appliances	0	0	0	0	17
Transportation and Logistics	4	63	160	250	9,812
Upstream Chemical Products	0	0	0	(74)	9
Upstream Metal Manufacturing	0	15	0	148	648
Video Production and Distribution	1	1	4	6	1,459
Vulcanized and Fired Materials	0	2	104	2	(66)
Water Transportation	(0)	28	0	1	(1,141)
Wood Products	0	36	(5)	1	339
Local Commercial Services	10	55	217	457	24,872
Local Community and Civic Organizations	25	379	539	1,807	49,657
Local Education and Training	11	109	661	1,196	24,862
Local Entertainment and Media	1	(0)	(1)	146	(3,890)
Local Federal Government Services	17	423	95	9	14,642
Local Financial Services	(31)	(141)	88	215	5,785
Local Food and Beverage Processing and Distribution	21	76	307	325	6,309
Local Government Services	13	67	218	23	22,611
Local Health Services	26	283	361	2,586	52,239
Local Hospitality Establishments	24	501	354	1,604	40,074
Local Household Goods and Services	4	33	161	(24)	(5,539)
Local Industrial Products and Services	(0)	(5)	3	0	588
Local Logistical Services	3	46	280	292	11,256
Local Motor Vehicle Products and Services	10	33	288	382	2,425
Local Personal Services (Non-Medical)	(4)	(17)	(8)	494	7,871
Local Real Estate, Construction, and Development	41	274	964	1,480	37,869
Local Retailing of Clothing and General Merchandise	(27)	(36)	123	160	(17,584)
Local State Government Services	3	131	52	249	9,469
Local Utilities	0	(1)	55	(722)	(540)
Non-Cluster	5	18	(21)	(3)	1,359
Total	286	4,757	6,874	16,418	535,680
Traded Total	134	2,529	2,138	5,740	251,345
Local Total	147	2,210	4,756	10,681	282,976

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-7
Cluster Employment Growth by Region (%), 2023-2033

Cluster	College Place	Walla Walla	Franklin	Benton	Washington
Aerospace Vehicles and Defense	--	--	49.7%	57.5%	2.8%
Agricultural Inputs and Services	13.0%	16.1%	-10.3%	35.4%	5.7%
Apparel	45.6%	-1.9%	51.5%	8.1%	-14.8%
Automotive	26.8%	59.3%	--	-48.1%	15.2%
Biopharmaceuticals	24.6%	44.0%	--	-56.6%	28.7%
Business Services	28.4%	36.1%	36.1%	5.1%	47.8%
Coal Mining	--	--	--	--	-54.8%
Communications Equipment and Services	2.6%	100.2%	12.8%	45.4%	-15.0%
Construction Products and Services	69.1%	43.2%	45.5%	37.4%	4.4%
Distribution and Electronic Commerce	24.0%	23.8%	18.4%	19.3%	15.3%
Downstream Chemical Products	40.6%	47.0%	--	61.4%	13.8%
Downstream Metal Products	-25.5%	-25.9%	18.9%	12.2%	7.4%
Education and Knowledge Creation	8.2%	2.0%	-0.5%	-0.2%	0.9%
Electric Power Generation and Transmission	--	-78.0%	--	99.2%	23.9%
Environmental Services	--	--	--	9.1%	9.7%
Financial Services	20.9%	24.2%	70.4%	19.3%	9.3%
Fishing and Fishing Products	--	-68.4%	24.1%	-58.9%	-23.7%
Food Processing and Manufacturing	47.7%	29.2%	34.4%	9.4%	16.1%
Footwear	--	--	--	80.0%	20.9%
Forestry	14.2%	27.0%	59.5%	105.9%	-6.9%
Furniture	111.0%	37.2%	-39.1%	11.4%	-8.8%
Hospitality and Tourism	15.7%	11.0%	8.4%	18.4%	14.3%
Information Technology and Analytical Instruments	71.6%	45.8%	62.9%	61.6%	15.3%
Insurance Services	-29.9%	-24.7%	79.9%	-2.4%	-1.6%
Jewelry and Precious Metals	--	--	--	12.8%	-8.7%
Leather and Related Products	--	--	--	9.4%	-3.3%
Lighting and Electrical Equipment	--	--	--	24.3%	22.2%
Livestock Processing	33.6%	47.5%	-89.1%	46.4%	18.2%
Marketing, Design, and Publishing	4.7%	23.3%	34.7%	7.3%	19.3%
Medical Devices	--	--	85.1%	7.2%	9.3%
Metal Mining	--	--	--	--	-1.1%
Metalworking Technology	0.5%	18.1%	72.2%	-11.0%	9.1%
Music and Sound Recording	49.2%	49.2%	--	3.8%	15.4%
Nonmetal Mining	74.6%	82.9%	-15.8%	171.8%	6.1%
Oil and Gas Production and Transportation	--	--	21.0%	-26.9%	15.1%
Paper and Packaging	2.8%	-1.8%	-18.9%	58.2%	-5.3%
Performing Arts	45.2%	30.1%	52.1%	28.5%	21.9%
Plastics	-4.7%	6.4%	--	-85.1%	-6.5%
Printing Services	-11.0%	56.6%	90.6%	33.0%	-16.7%
Production Technology and Heavy Machinery	12.2%	-1.5%	88.4%	53.1%	9.8%

Recreational and Small Electric Goods	14.6%	-34.0%	79.0%	17.3%	-3.3%
Textile Manufacturing	--	--	--	-12.5%	20.4%
Tobacco	--	--	--	--	40.5%
Trailers, Motor Homes, and Appliances	--	--	--	--	5.2%
Transportation and Logistics	43.7%	20.7%	22.0%	38.8%	17.1%
Upstream Chemical Products	24.7%	4.0%	--	-12.8%	0.5%
Upstream Metal Manufacturing	21.8%	63.5%	--	57.9%	18.8%
Video Production and Distribution	36.3%	36.3%	80.5%	34.9%	37.4%
Vulcanized and Fired Materials	--	75.6%	66.5%	25.5%	-2.1%
Water Transportation	-0.9%	74.6%	0.9%	14.1%	-9.2%
Wood Products	34.2%	90.5%	-17.8%	6.0%	2.4%
Local Commercial Services	18.9%	8.1%	20.5%	11.2%	12.8%
Local Community and Civic Organizations	60.5%	23.9%	34.3%	38.5%	27.9%
Local Education and Training	3.3%	6.2%	18.0%	17.8%	11.9%
Local Entertainment and Media	10.2%	-0.1%	-2.3%	17.9%	-16.6%
Local Federal Government Services	8.0%	21.0%	12.8%	0.8%	9.9%
Local Financial Services	-44.2%	-33.1%	24.9%	11.9%	9.5%
Local Food and Beverage Processing and Distribution	26.1%	9.6%	24.5%	15.2%	6.0%
Local Government Services	4.5%	7.2%	16.5%	0.6%	13.7%
Local Health Services	7.7%	8.5%	18.0%	21.4%	13.5%
Local Hospitality Establishments	23.4%	21.5%	16.4%	17.1%	13.6%
Local Household Goods and Services	15.9%	7.5%	19.6%	-1.5%	-8.1%
Local Industrial Products and Services	-34.0%	-8.7%	7.0%	0.3%	6.9%
Local Logistical Services	21.4%	26.6%	22.9%	32.5%	18.6%
Local Motor Vehicle Products and Services	10.9%	5.8%	17.0%	14.0%	2.6%
Local Personal Services (Non-Medical)	-8.5%	-2.7%	-0.8%	16.8%	6.8%
Local Real Estate, Construction, and Development	19.1%	13.2%	24.3%	14.6%	10.4%
Local Retailing of Clothing and General Merchandise	-16.0%	-4.6%	15.1%	4.1%	-16.9%
Local State Government Services	2.3%	10.0%	6.0%	32.6%	14.5%
Local Utilities	26.9%	-0.9%	39.0%	-16.7%	-2.4%
Non-Cluster	27.1%	8.4%	-36.0%	-0.7%	3.7%
Total	8.1%	14.1%	16.8%	15.3%	13.2%
Traded Total	10.4%	19.2%	13.3%	17.4%	18.6%
Local Total	6.6%	10.9%	19.2%	14.4%	10.6%

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-8
Shift Share Analysis, 2013-23
College Place Area

Cluster	Industrial Mix Effect	National Growth Effect	Local Share	Actual Change
Aerospace Vehicles and Defense	0	0	--	0
Agricultural Inputs and Services	(1)	2	(14)	(13)
Apparel	(0)	0	0	(0)
Automotive	0	0	0	0
Biopharmaceuticals	0	0	UND	0
Business Services	7	1	(20)	(11)
Coal Mining	0	0	--	0
Communications Equipment and Services	(0)	0	(0)	(0)
Construction Products and Services	0	0	(0)	(0)
Distribution and Electronic Commerce	1	0	(6)	(4)
Downstream Chemical Products	0	0	0	0
Downstream Metal Products	0	0	(0)	(0)
Education and Knowledge Creation	11	60	(186)	(115)
Electric Power Generation and Transmission	0	0	--	0
Environmental Services	0	0	--	0
Financial Services	0	0	28	29
Fishing and Fishing Products	0	0	--	0
Food Processing and Manufacturing	3	1	(10)	(7)
Footwear	0	0	--	0
Forestry	0	0	UND	2
Furniture	(0)	0	(0)	(0)
Hospitality and Tourism	1	1	47	49
Information Technology and Analytical Instruments	0	0	UND	9
Insurance Services	(0)	0	(2)	(1)
Jewelry and Precious Metals	0	0	--	0
Leather and Related Products	0	0	--	0
Lighting and Electrical Equipment	0	0	--	0
Livestock Processing	1	1	(3)	(1)
Marketing, Design, and Publishing	1	1	(2)	(1)
Medical Devices	0	0	--	0
Metal Mining	0	0	--	0
Metalworking Technology	(0)	0	(0)	(1)
Music and Sound Recording	0	0	0	1
Nonmetal Mining	0	0	(1)	(1)
Oil and Gas Production and Transportation	0	0	--	0
Paper and Packaging	(0)	0	0	0
Performing Arts	1	0	(4)	(3)
Plastics	0	0	(0)	(0)
Printing Services	(1)	0	(3)	(4)
Production Technology and Heavy Machinery	(0)	0	(0)	(0)

Recreational and Small Electric Goods	0	0	(0)	(0)
Textile Manufacturing	0	0	--	0
Tobacco	0	0	--	0
Trailers, Motor Homes, and Appliances	0	0	--	0
Transportation and Logistics	1	0	3	4
Upstream Chemical Products	0	0	0	0
Upstream Metal Manufacturing	(0)	0	0	0
Video Production and Distribution	0	0	0	0
Vulcanized and Fired Materials	0	0	--	0
Water Transportation	0	0	UND	0
Wood Products	0	0	0	0
Local Commercial Services	2	2	9	13
Local Community and Civic Organizations	6	2	(1)	7
Local Education and Training	3	19	(59)	(37)
Local Entertainment and Media	(4)	1	(2)	(5)
Local Federal Government Services	(3)	4	136	136
Local Financial Services	5	1	36	42
Local Food and Beverage Processing and Distribution	3	3	16	22
Local Government Services	(0)	18	(80)	(62)
Local Health Services	35	17	(39)	13
Local Hospitality Establishments	2	1	86	88
Local Household Goods and Services	(0)	2	(8)	(7)
Local Industrial Products and Services	(0)	0	(2)	(2)
Local Logistical Services	4	1	(3)	2
Local Motor Vehicle Products and Services	6	4	(3)	8
Local Personal Services (Non-Medical)	9	3	(22)	(10)
Local Real Estate, Construction, and Development	36	8	16	61
Local Retailing of Clothing and General Merchandise	(18)	10	(27)	(35)
Local State Government Services	(6)	5	15	14
Local Utilities	(0)	0	1	1

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-9
Shift Share Analysis, 2013-23
Walla Walla County

Cluster	Industrial Mix Effect	National Growth Effect	Local Share	Actual Change
Aerospace Vehicles and Defense	0	0	--	0
Agricultural Inputs and Services	114	7	(469)	(348)
Apparel	(4)	1	52	49
Automotive	5	0	(27)	(21)
Biopharmaceuticals	0	0	UND	0
Business Services	92	0	75	167
Coal Mining	0	0	--	0
Communications Equipment and Services	(8)	0	15	7
Construction Products and Services	10	0	(2)	8
Distribution and Electronic Commerce	135	0	70	205
Downstream Chemical Products	0	0	(0)	(0)
Downstream Metal Products	17	0	(123)	(106)
Education and Knowledge Creation	204	0	(863)	(659)
Electric Power Generation and Transmission	(1)	0	(20)	(22)
Environmental Services	0	0	--	0
Financial Services	5	0	68	73
Fishing and Fishing Products	(2)	0	(5)	(7)
Food Processing and Manufacturing	192	0	296	487
Footwear	0	0	--	0
Forestry	(1)	0	12	11
Furniture	0	0	4	4
Hospitality and Tourism	31	0	(93)	(62)
Information Technology and Analytical Instruments	0	0	UND	108
Insurance Services	2	0	(22)	(20)
Jewelry and Precious Metals	0	0	--	0
Leather and Related Products	0	0	(1)	(1)
Lighting and Electrical Equipment	0	0	--	0
Livestock Processing	156	0	181	337
Marketing, Design, and Publishing	32	0	(95)	(64)
Medical Devices	0	0	--	0
Metal Mining	0	0	--	0
Metalworking Technology	(1)	0	(3)	(4)
Music and Sound Recording	1	0	1	2
Nonmetal Mining	0	0	3	4
Oil and Gas Production and Transportation	0	0	--	0
Paper and Packaging	(14)	0	(135)	(149)
Performing Arts	30	0	75	105
Plastics	5	0	3	8
Printing Services	(16)	0	(55)	(71)
Production Technology and Heavy Machinery	30	0	(111)	(81)

Recreational and Small Electric Goods	4	0	(47)	(43)
Textile Manufacturing	(0)	0	(0)	(1)
Tobacco	0	0	--	0
Trailers, Motor Homes, and Appliances	0	0	--	0
Transportation and Logistics	49	0	0	49
Upstream Chemical Products	1	0	(1)	(0)
Upstream Metal Manufacturing	(1)	0	1	0
Video Production and Distribution	0	0	0	0
Vulcanized and Fired Materials	0	0	(4)	(4)
Water Transportation	0	0	35	35
Wood Products	3	0	22	25
Local Commercial Services	73	0	(67)	6
Local Community and Civic Organizations	357	0	(395)	(38)
Local Education and Training	101	0	(59)	42
Local Entertainment and Media	(39)	0	59	20
Local Federal Government Services	12	0	660	671
Local Financial Services	153	0	(398)	(245)
Local Food and Beverage Processing and Distribution	70	0	14	84
Local Government Services	49	0	(87)	(38)
Local Health Services	530	0	(542)	(12)
Local Hospitality Establishments	261	0	548	809
Local Household Goods and Services	18	0	30	48
Local Industrial Products and Services	(8)	0	(21)	(29)
Local Logistical Services	74	0	(81)	(7)
Local Motor Vehicle Products and Services	73	0	(70)	3
Local Personal Services (Non-Medical)	147	0	(215)	(68)
Local Real Estate, Construction, and Development	399	0	270	669
Local Retailing of Clothing and General Merchandise	(33)	0	(33)	(66)
Local State Government Services	(12)	0	113	101
Local Utilities	(11)	0	16	6

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-10
Shift Share Analysis, 2013-23
Franklin County

Cluster	Industrial Mix Effect	National Growth Effect	Local Share	Actual Change
Aerospace Vehicles and Defense	(0)	0	10	10
Agricultural Inputs and Services	(989)	1,192	(1,432)	(1,229)
Apparel	(1)	0	2	1
Automotive	0	3	(21)	(17)
Biopharmaceuticals	0	0	--	0
Business Services	93	99	(316)	(124)
Coal Mining	0	0	--	0
Communications Equipment and Services	(12)	6	(18)	(24)
Construction Products and Services	0	10	21	31
Distribution and Electronic Commerce	146	279	232	657
Downstream Chemical Products	(0)	0	(1)	(1)
Downstream Metal Products	(1)	6	5	11
Education and Knowledge Creation	(120)	188	(379)	(311)
Electric Power Generation and Transmission	0	0	--	0
Environmental Services	0	0	(1)	(1)
Financial Services	(10)	15	56	62
Fishing and Fishing Products	(2)	1	4	3
Food Processing and Manufacturing	350	436	266	1,052
Footwear	0	0	--	0
Forestry	(1)	1	(2)	(2)
Furniture	(0)	0	(2)	(2)
Hospitality and Tourism	(50)	90	50	90
Information Technology and Analytical Instruments	14	12	11	37
Insurance Services	(0)	0	28	28
Jewelry and Precious Metals	0	0	--	0
Leather and Related Products	0	0	--	0
Lighting and Electrical Equipment	0	0	--	0
Livestock Processing	(1)	3	24	27
Marketing, Design, and Publishing	(0)	9	13	22
Medical Devices	(14)	36	(6)	16
Metal Mining	0	0	--	0
Metalworking Technology	(0)	0	5	5
Music and Sound Recording	0	0	--	0
Nonmetal Mining	0	4	20	24
Oil and Gas Production and Transportation	(19)	7	(22)	(34)
Paper and Packaging	(4)	3	60	59
Performing Arts	5	4	76	84
Plastics	0	0	--	0
Printing Services	(3)	2	24	23
Production Technology and Heavy Machinery	(3)	4	36	37

Recreational and Small Electric Goods	(0)	1	(3)	(2)
Textile Manufacturing	(1)	0	(1)	(2)
Tobacco	0	0	--	0
Trailers, Motor Homes, and Appliances	0	0	--	0
Transportation and Logistics	14	89	85	188
Upstream Chemical Products	(1)	2	(15)	(14)
Upstream Metal Manufacturing	0	0	--	0
Video Production and Distribution	(1)	1	(0)	(0)
Vulcanized and Fired Materials	(3)	3	137	137
Water Transportation	(0)	0	9	9
Wood Products	1	11	(52)	(40)
Local Commercial Services	(57)	168	(69)	42
Local Community and Civic Organizations	74	223	(75)	222
Local Education and Training	(297)	461	725	889
Local Entertainment and Media	(22)	10	2	(10)
Local Federal Government Services	(112)	119	14	20
Local Financial Services	18	46	12	76
Local Food and Beverage Processing and Distribution	(68)	168	134	235
Local Government Services	(140)	202	33	95
Local Health Services	(12)	271	111	371
Local Hospitality Establishments	10	271	243	524
Local Household Goods and Services	(64)	89	262	287
Local Industrial Products and Services	(23)	15	(43)	(52)
Local Logistical Services	181	123	173	476
Local Motor Vehicle Products and Services	(54)	246	20	212
Local Personal Services (Non-Medical)	44	167	(240)	(29)
Local Real Estate, Construction, and Development	286	396	895	1,577
Local Retailing of Clothing and General Merchandise	(157)	127	78	47
Local State Government Services	(158)	149	(13)	(22)
Local Utilities	(17)	12	76	70

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

Table IV-11
Shift Share Analysis, 2013-23
Benton County

Cluster	Industrial Mix Effect	National Growth Effect	Local Share	Actual Change
Aerospace Vehicles and Defense	(1)	1	(1)	(1)
Agricultural Inputs and Services	(1,271)	1,448	1,667	1,843
Apparel	(3)	1	6	4
Automotive	(2)	13	(46)	(36)
Biopharmaceuticals	0	1	41	43
Business Services	543	1,380	(2,557)	(634)
Coal Mining	0	0	--	0
Communications Equipment and Services	(47)	26	(39)	(61)
Construction Products and Services	(32)	128	1,120	1,216
Distribution and Electronic Commerce	25	275	55	355
Downstream Chemical Products	0	0	UND	6
Downstream Metal Products	(4)	11	(23)	(16)
Education and Knowledge Creation	(909)	1,231	(50)	272
Electric Power Generation and Transmission	0	0	UND	29
Environmental Services	149	321	599	1,070
Financial Services	(55)	74	96	116
Fishing and Fishing Products	(7)	4	(9)	(12)
Food Processing and Manufacturing	163	558	(60)	662
Footwear	0	0	UND	3
Forestry	(1)	1	66	66
Furniture	(9)	9	(6)	(6)
Hospitality and Tourism	(160)	235	67	142
Information Technology and Analytical Instruments	26	45	64	135
Insurance Services	(31)	39	11	19
Jewelry and Precious Metals	(0)	0	1	1
Leather and Related Products	(1)	1	9	9
Lighting and Electrical Equipment	(2)	4	(13)	(11)
Livestock Processing	(1)	2	(0)	1
Marketing, Design, and Publishing	(35)	115	(146)	(66)
Medical Devices	(7)	12	19	24
Metal Mining	0	0	--	0
Metalworking Technology	(3)	3	15	14
Music and Sound Recording	2	1	(3)	(0)
Nonmetal Mining	(0)	0	(1)	(1)
Oil and Gas Production and Transportation	(6)	3	(7)	(10)
Paper and Packaging	(2)	2	(8)	(9)
Performing Arts	17	26	64	106
Plastics	(9)	22	(103)	(90)
Printing Services	(33)	18	(1)	(16)
Production Technology and Heavy Machinery	(8)	9	95	96

Recreational and Small Electric Goods	(2)	3	10	11
Textile Manufacturing	(8)	4	(12)	(16)
Tobacco	(0)	0	(0)	(0)
Trailers, Motor Homes, and Appliances	0	0	--	0
Transportation and Logistics	(18)	105	104	190
Upstream Chemical Products	(103)	159	(171)	(115)
Upstream Metal Manufacturing	(39)	34	111	106
Video Production and Distribution	(2)	2	6	7
Vulcanized and Fired Materials	(1)	1	1	1
Water Transportation	(0)	0	4	4
Wood Products	(2)	9	(29)	(22)
Local Commercial Services	(395)	751	448	803
Local Community and Civic Organizations	(33)	732	822	1,521
Local Education and Training	(865)	1,161	1,402	1,698
Local Entertainment and Media	(310)	164	254	108
Local Federal Government Services	(283)	294	(75)	(64)
Local Financial Services	(4)	386	(255)	128
Local Food and Beverage Processing and Distribution	(188)	330	561	702
Local Government Services	(792)	1,016	(731)	(507)
Local Health Services	(671)	2,138	1,348	2,815
Local Hospitality Establishments	(411)	1,612	1,180	2,380
Local Household Goods and Services	(293)	365	(35)	37
Local Industrial Products and Services	(45)	32	16	2
Local Logistical Services	96	124	145	364
Local Motor Vehicle Products and Services	(218)	495	300	577
Local Personal Services (Non-Medical)	(47)	499	335	787
Local Real Estate, Construction, and Development	365	1,543	1,517	3,425
Local Retailing of Clothing and General Merchandise	(998)	852	369	223
Local State Government Services	(129)	124	233	227
Local Utilities	(1,465)	1,110	(132)	(487)

Source: U.S. Cluster Mapping, Institute for Strategy and Competitiveness, Harvard Business School; Lightcast; TNDG.

V. Economic Development Capacity Analysis

EDA Economic Development Capacity Index

The Economic Development Capacity Index (EDCI), developed through a partnership between the Economic Development Administration (EDA) and the National Economic Research and Resilience Center at Argonne National Laboratory (Argonne), uses publicly available data to assess critical elements that contribute to a county's overall economic development capacity.

Economic development capacity is comprised of the knowledge, skills, assets, and resources that foster prosperity, innovation, entrepreneurship, and high quality of life in a community.

The EDCI brings together 53 indicators across five major capacity areas:

- Financial
- Human Capital
- Industry Composition
- Infrastructure
- Institutions and Partnerships

Specifically, the EDCI provides county- level quantitative and qualitative scores by capacity area, as well as the national percentile, relative to the rest of the nation, for each individual indicator.

The EDCI can be used to support or inform economic development planning, project identification, or applications for assistance. It is intended to provide an accessible breakdown and evaluation of the constituent components of economic development capacity.

EDCI Scores for Walla Walla County

Human Capital: This capacity area focuses on the overall composition of the workforce and the quality of life for all residents in a county. Economic development differentiates itself from economic growth by incorporating the goal of improving the quality of life of individuals. This capacity area includes indicators related to education attainment, creative or inventive

Human Capital Level: Moderate Percentile: 0.30

Financial: This capacity area considers the financial environment within a county. Ready access to capital can spur economic growth and entrepreneurship. Conversely, capital constraints are a significant limiter of economic growth and can inhibit innovation. This capacity area includes indicators related to local government financial health, private sector access to small business loans, small business access to federal seed funding for technology and research development activities, and access to local banks.

Financial Capacity Level: Moderate Percentile: 0.78

Industry: This capacity area considers the overall business environment within a county. Diverse economies, with robust local clusters, do not rely on a single source for their economic stability, whether that is a single business or a single industry. Increases in industry diversity and the presence of clusters contribute to economic growth and can increase resilience to economic shocks. This capacity area specifically includes measures related to local clusters for establishments and employment, industry diversity, business entries and exits, and the presence of advanced industries.

Industry Capacity Level: Moderate Percentile: 0.18

Infrastructure: This capacity area considers the physical and environmental resources that make business and economic development activities possible. Infrastructure facilitates the movement of goods, services, and people and enables the operations of businesses. It also contributes to quality of life, making a community or region more attractive to individuals, families, and businesses. Indicators relate to the status, quality, or accessibility of infrastructure and natural systems, including transportation, ports, transit, broadband, energy reliability, air and water quality, and green space.

Infrastructure Capacity Level: Limited Percentile: 0.27

Institutions and Partnerships: This capacity area focuses on the public and private entities that support and facilitate economic development through collaborative networks. The support network created by these institutions and partnerships act as a force multiplier for economic development planning and investments. This capacity area includes indicators related to local government capacity, experience with grants, participation in Economic Development Districts (EDDs), institutions of higher education, non-profits, and cultural organizations.

Institutions & Partnerships Capacity Level: Low Percentile: 0.14

Innovation Intelligence Index

The Innovation Index provides a set of analytic tools that can help communities reach a strong consensus on regional strategic direction. This data can also help understand a region's weaknesses, strengths and potential. The data is provided at the countywide level. Walla Walla County has moderate relative Innovation Capacity.

Human Capital and Knowledge Creation Index 116.3

The relative availability of human capital resources is moderate in this area. The top measures for this index are:

- Associate's Degree Attainment (rank 316)
- Some College Attainment (rank 396)

Business Dynamics Index 122.6

Patterns of establishment formation and composition indicate a moderate level of business competitiveness. The top measures for this index are:

- Traded Sector Establishment Births to Deaths Ratio (rank 514)
- Change in Establishment Births to All Establishment Ratio (rank 1227)

Business Profile Index 67.2

The relative availability of resources for entrepreneurs and businesses is low in this area. The top measures for this index are:

- Industry Diversity (rank 814)
- Average Large Establishments (per 10,000 Workers) (rank 769)

Employment and Productivity Index 120.6

Industry performance in Walla Walla County, WA indicate a moderate level of positive outcomes from existing economic activity. The top measures for this index are:

- Patent Diversity (rank 878)
- Change in Gross Domestic Product (per Worker) (rank 548)

Economic Well-Being Index 133.1

As measured by residential internet connectivity and income, this area has a moderate standard of living. The top measures for this index are:

- Broadband Infrastructure and Adoption (rank 971)
- Change in Annual Wage and Salary Earnings per Worker (rank 858)

VI. Economic Resilience

What is Economic Resilience?

Economic resilience refers to the ability of an economy, whether at the level of households, firms, or entire regions, to withstand, recover from, and adapt to economic shocks or disruptions. It involves two main components:

- **Absorption:** The capacity to absorb the impact of economic shock, minimizing immediate losses.
- **Adaptation:** The ability to adapt to changing circumstances and strengthen responses to future shocks

This concept is crucial for ensuring long-term economic stability and growth, as it helps mitigate the adverse effects of unexpected events, such as natural disasters, financial crises, or pandemics

Measuring economic resilience involves evaluating how well an economy can absorb, recover from, and adapt to shocks. Here are some key methods and indicators used:

- **Economic Diversification:** Assessing the variety of industries within an economy. A more diversified economy is generally more resilient because it doesn't rely on a single sector.
- **Employment Rates:** Monitoring changes in employment levels can indicate how well an economy is coping with disruptions.
- **Income Stability:** Evaluating the consistency of income levels across different periods and economic conditions.
- **Access to Resources:** Measuring the availability and accessibility of essential resources, such as capital, technology, and infrastructure.
- **Social Safety Nets:** Analyzing the effectiveness of social programs that support individuals during economic downturns.
- **Adaptive Capacity:** Assessing the ability of businesses and individuals to innovate and adapt to new economic conditions

Establishing economic resilience in a local or regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build up the capacity to mitigate and respond to that risk.

FEMA National Risk Index

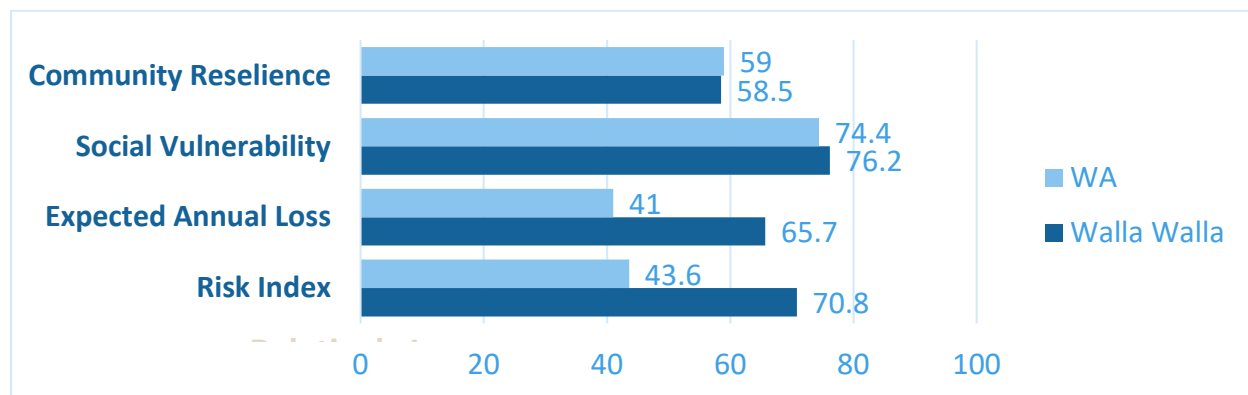
The Risk Index leverages available source data for natural hazard and community risk factors to develop a baseline risk measurement for communities at risk to identify natural disasters. Combined with the Multi-jurisdictional Hazard Mitigation, this serves as a viable tool to evaluate and develop economic resilience strategies and initiatives.

Risk Index is **Relatively Low** Score **70.8**

Expected Annual Loss is **Relatively Low** Score **65.7**

Social Vulnerability is **Relatively High** Score **76.2**

Community Resilience is **Relatively Moderate** Score **58.5**



Communities in **Walla Walla County, WA** have a **Relatively Moderate** ability to prepare for anticipated natural hazards, adapt to changing conditions, and withstand and recover rapidly from disruptions when compared to the rest of the U.S.

Social groups have a **Relatively High** susceptibility to the adverse impacts of natural hazards when compared to the rest of the U.S.

The Risk Index rating is **Relatively Low** when compared to the rest of the U.S.

Expected annual loss due to natural disasters is **Relatively Low** according to FEMA compared to the rest of the US.

Risk Factor Breakdown

Hazard Type	EAL Value	Social Vulnerability	Community Resilience	CRF	Risk Value	Risk Index Score
Earthquake	\$4,903,997	Relatively High	Relatively Moderate	1.33	\$6,800,269	93.8
Heat Wave	\$2,443,370	Relatively High	Relatively Moderate	1.33	\$3,133,722	96
Cold Wave	\$724,432	Relatively High	Relatively Moderate	1.33	\$924,590	91.9
Ice Storm	\$325,376	Relatively High	Relatively Moderate	1.33	\$421,355	85.2
Wildfire	\$182,231	Relatively High	Relatively Moderate	1.33	\$240,951	72.7
Strong Wind	\$153,628	Relatively High	Relatively Moderate	1.33	\$199,795	30.8
Riverine Flooding	\$168,036	Relatively High	Relatively Moderate	1.33	\$178,487	31.4
Avalanche	\$123,223	Relatively High	Relatively Moderate	1.33	\$137,749	48.1
Drought	\$100,359	Relatively High	Relatively Moderate	1.33	\$124,655	69.1
Tornado	\$71,704	Relatively High	Relatively Moderate	1.33	\$91,047	12.3
Winter Weather	\$28,361	Relatively High	Relatively Moderate	1.33	\$36,176	37.8
Landslide	\$24,516	Relatively High	Relatively Moderate	1.33	\$30,324	64
Lightning	\$18,450	Relatively High	Relatively Moderate	1.33	\$23,405	13.6
Hail	\$12,998	Relatively High	Relatively Moderate	1.33	\$16,341	14.8

Overall Economic Resilience Strategies

The CEDS action plan will promote steady-state initiatives in economic resilience strategies through:

Diversification Initiatives: The City will broaden their industrial base by developing emerging clusters or industries that build on unique local assets and strengths. This reduces reliance on any single sector and provides stability during downturn.

Pre-Disaster Recovery Planning: The City, as part of the multi-jurisdictional Hazard Mitigation Plan, will establishing plans that define key stakeholders, roles, responsibilities, and actions to take before a disaster occurs. This ensures a coordinated and efficient response when disruptions happen.

Investment in Infrastructure: The CEDS will promote the building and maintaining of robust infrastructure, such as transportation networks and communication systems, to support economic activities and ensure quick recovery from disruptions.

Workforce Development Programs: Promote the development of training and education to equip the workforce with skills needed for emerging industries and technologies. This helps workers adapt to changing economic conditions.

Innovation and Technology Adoption: Promoting innovation and the adoption of new technologies to enhance productivity and adaptability. This includes supporting research and development initiatives.

City of College Place

**Economic Development, Tourism,
and Events Commission**



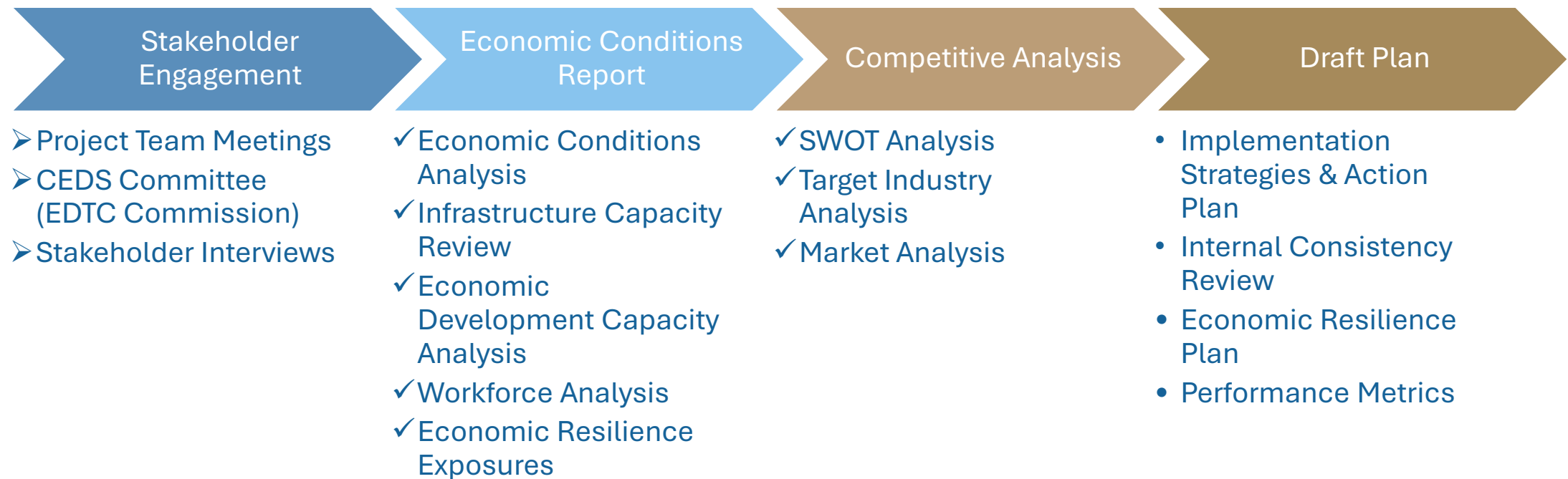
Comprehensive Economic Development Strategy

Monthly Update

February 3, 2025



The CEDS Planning Process



S

STRENGTH

1. Strong educational institutions, including Walla Walla University and quality K-12 schools
2. Affordable housing compared to neighboring areas
3. Growing population and new residential developments
4. Proximity to wine tourism and agricultural assets
5. Recent expansion of Highway 12, improving connectivity to Tri-Cities
6. Established Creative District spanning College Place and Walla Walla
7. Clean, safe community with good parks and outdoor recreation

W

WEAKNESSES

1. Limited commercial and retail options within city limits
2. Lack of fine dining and hotel accommodations
3. Traffic congestion, particularly at key intersections
4. Limited available space for new businesses
5. Perception as primarily a Seventh-day Adventist community
6. Underdeveloped downtown area and lack of walkable shopping districts
7. Limited public transportation options

O

OPPORTUNITIES

1. Development of Martin Airfield for commercial and light industrial use
2. Expansion of the urban growth area for new residential and commercial development
3. Potential for mixed-use developments to create vibrant, walkable areas
4. Leveraging the Creative District to attract artists, tourists, and creative businesses
5. Collaboration with Walla Walla University for workforce development and innovation
6. Attraction of remote workers due to quality of life and affordability
7. Development of incubator spaces for growing businesses

T

THREATS

1. Competition from neighboring Walla Walla for businesses and development
2. Potential loss of agricultural land to development
3. Resistance to change from some long-time residents
4. Rising housing costs affecting affordability
5. Dependence on wine tourism, which can be volatile
6. Potential for overregulation hindering business growth
7. Brain drain of young professionals to larger cities

Next Steps



- Additional Stakeholder Interviews– February
- Economic Conditions Analysis – Review & Update
- Project List Development – Collected & Cataloging
- Review Foundational Report– March 3, 2025(EDTEC Meeting)

Thank you.



THE NATELSON DALE GROUP, INC



ECONOMIC GROWTH
STRATEGIES



CITY OF COLLEGE PLACE



STRATEGIC PLAN

2025-2035

Table of Contents



Introduction	03
Mission and Vision	04
Key Priorities	05
A Connected Community	06
A Fun Community	07
A Resilient Community	08
A Safe Community	09
An Affordable Community	10
Our Approach	11
Acknowledgements	12
Appendix A: Implementation	13





Introduction

Over the past several months, the City of College Place has worked with the community to develop this Strategic Plan. Rooted in the input from the community, this plan was developed through a lens of viewing the community's past, present, and future.

The process for developing this plan was collaborative and we appreciate the involvement from residents of all ages in our surveys and interviews to help outline Key Priorities and Goals for College Place.

This is intended to be a living document, flexible and amended to meet community needs. The priorities within will guide budget and policy decisions and continual feedback is essential to improve the services that the city provides.

Thank you to all involved in this project, from us on the City Council, to the staff, and our engaged community who helped make this all possible.

Sincerely,
College Place City Council



→ **Mission**

Building a safe, affordable, and connected community where everyone thrives, with vibrant spaces, resilient growth, and shared experiences.

→ **Vision**

College Place is a welcoming, vibrant, diverse, safe and walkable city with a flourishing downtown. It is rich in academics, community events, engagement, acceptance and respect. Residents and visitors enjoy a community of connectedness, collaboration, recreation and service. It boasts available housing, robust commercial growth, sustainable financial stewardship, and thoughtful planning for all generations.

Key Priorities



The Key Priorities listed below were identified through the research and engagement process of the creation of the Strategic Plan. These priorities reflect the most important focus areas for College Place and will inform the goals, objectives, and projects for the Strategic Plan.

→ A Connected Community



→ A Fun Community



→ A Resilient Community



→ A Safe Community



→ An Affordable Community





A Connected Community

College Place is a connected, informed, and engaged community where residents, businesses, and institutions actively collaborate to achieve the vision of the community.

Goal 1: Enhance city communication channels and accessibility.

- **Objectives:**

- 1.1. Expand and Optimize Digital Communication
- 1.2. Bridge Language Barriers in the Community
- 1.3. Hire Dedicated Communication Staff

Goal 2: Strengthen community engagement

- **Objectives:**

- 2.1. Understand Community Communication Preferences
- 2.2. Expand Face-to-Face Outreach
- 2.3. Increase Transparency About City Operations

Goal 3: Collaborate with the education sector in College Place for more comprehensive engagement with youth

- **Objectives:**

- 3.1. Partner with College Place (public and private) K-12 schools and Walla Walla University (WWU) to explore collaborative communication opportunities.
- 3.2. Leverage Student Talent
- 3.3. Promote Youth Involvement





A Fun Community

Establish College Place as a vibrant hub of recreation, culture, and connection, fostering a sense of belonging while attracting regional, state, and national attention.

Goal 1: Foster Community Connection Through Shared Interests

- **Objectives:**
 - 1.1. Create Opportunities for Hobby-Based Connections
 - 1.2. Leverage the New Community Center (Opening 2027)
 - 1.3. Expand Farmer's Market Offerings

Goal 2: Develop Recreation & Activity Programs

- **Objectives:**
 - 2.1. Launch City-Led Sports and Recreation Programs
 - 2.2. Enhance Park Identity and Usability

Goal 3: Support & Expand Community Events

- **Objectives:**
 - 3.1. Build on Existing Community Events
 - 3.2. Attract and Host a Signature Regional Event

Goal 4: Strengthen the Identity of College Place

- **Objectives:**
 - 4.1. Create a Welcoming Atmosphere for Visitors
 - 4.2. Find and Collaborate with a Sister City
 - 4.3 Use Creative District Programs for Community Art





A Resilient Community

Develop College Place into a resilient, sustainable, and prepared community, capable of withstanding challenges while maintaining essential services and infrastructure.

Goal 1: Enhance Community Walkability & Accessibility

- **Objectives:**
 - 1.1. Improve Sidewalks & Road Infrastructure
 - 1.2. Maintain “Invisible” Infrastructure

Goal 2: Prepare for Emergencies and Disasters

- **Objectives:**
 - 2.1. Plan for Weather-Related Emergencies
 - 2.2. Enhance Staff Emergency Training

Goal 3: Maintain & Upgrade Existing Infrastructure

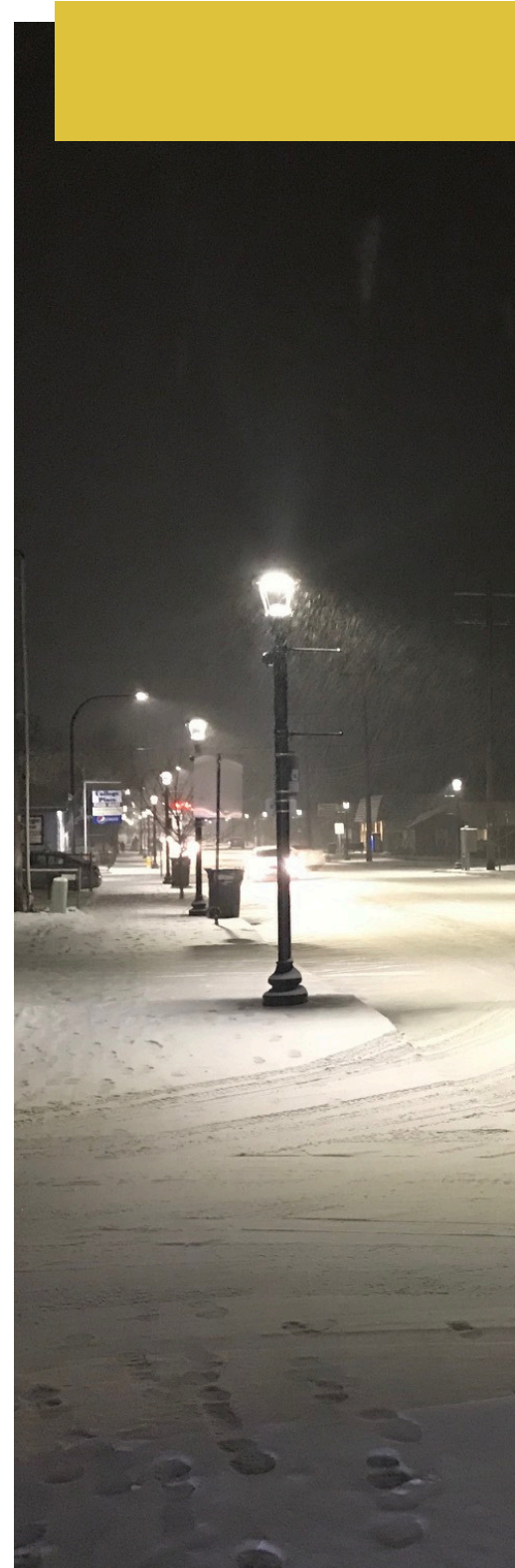
- **Objectives:**
 - 3.1. Establish a Proactive Maintenance Schedule
 - 3.2. Prioritize Street Replacement & Repairs

Goal 4: Ensure Sustainable Water Resources

- **Objectives:**
 - 4.1. Plan for Current & Future Water Needs
 - 4.2. Strengthen Water Partnerships
 - 4.3. Promote Water-Wise Landscaping

Goal 5: Ensure Stormwater Management

- **Objectives:**
 - 5.1. Improve Stormwater Infrastructure
 - 5.2 Implement Sustainable Stormwater Practices





A Safe Community

Cultivate a safe, secure, and well-lit community where residents, businesses, and institutions thrive, supported by robust law enforcement, fire protection, and proactive safety initiatives.

Goal 1: Improve Community Safety Infrastructure

- **Objectives:**
 - 1.1. Illuminate Public Spaces
 - 1.2. Leverage Technology for Community Safety

Goal 2: Strengthen Police & Fire Departments

- **Objectives:**
 - 2.1. Stabilize Staffing Levels
 - 2.2. Construct & Improve Public Safety Facilities
 - 2.3 Sustain a Strong Police Presence

Goal 3: Enhance Community & Institutional Collaboration

- **Objectives:**
 - 3.1. Coordinate with WWU Security
 - 3.2. Foster Mutual Aid Agreement

Goal 4: Promote Community Education & Prevention Programs

- **Objectives:**
 - 4.1. Implement Safety Education Initiatives
 - 4.2. Provide Alternative Activities for Older Teens.

Goal 5: Strengthen Community Standards Through Codes & Enforcement

- **Objectives:**
 - 5.1 Enforce Codes for Safety & Community Image
 - 5.2 Address Substances Abuse Challenges





An Affordable Community

Foster a balanced, thriving community where affordable living is achievable through strategic policy, economic growth, and resource stewardship.

Goal 1: Develop & Maintain Sustainable Financial Policies

Objectives:

- 1.1. Ensure Fair & Sustainable Utility Rates
- 1.2. Adopt Policies to Promote Affordability

Goal 2: Support & Grow Local Business

Objectives:

- 2.1. Prevent Economic Leakage
- 2.2. Diversify Business Offerings

Goal 3: Facilitate Growth Within & Beyond Current Boundaries

Objectives:

- 3.1. Address Landlocked Growth
- 3.2. Encourage Redevelopment

Goal 4: Promote Affordable Housing & Employment Opportunities

Objectives:

- 4.1. Encourage Affordable & Diverse Housing
- 4.2. Create Jobs that Support Housing Needs

Goal 5: Enable Flexibility Through Innovative Policies & Ordinances

Objectives:

- 5.1 Adapt Codes to Encourage Growth
- 5.2 Establish Legislative Advocacy

Goal 6: Demonstrate Fiscal Responsibility

Objectives:

- 6.1 Be Good Stewards of Public Resources
- 6.2 Promote Long-Term Financial Stability





Our Approach

PHASE 1

- Research and Analysis
- Outreach (124 Surveys, 21 Interviews)

PHASE 2

- City Council and Staff Collaboration
- Development of Priorities and Goals

PHASE 3

- Refinement of Goals
- Development of Objectives
- Adoption

PHASE 4

- Staff Development of Projects and Initiatives
- Continual Work to Implement Plan



Acknowledgements



We would like to thank everyone who has been such a critical and integral part of creating this plan through a commitment of time, ideas, and community passion.

→ College Place City Council

- Norma Hernandez, Mayor
- Monica Boyle, Councilmember
- Michael Cleveland, Councilmember
- Tito Espinoza, Councilmember
- Paul Jessup, Councilmember
- Loren Peterson, Councilmember
- Heather Schermann, Councilmember
- Melodie Williams, Councilmember

→ College Place Leadership

- Mike Rizzitiello, City Administrator
- Maryelizabeth Garcia, City Clerk
- Jon Rickard, Community Development Director
- David Winter, Fire Chief
- Troy Tomaras, Police Chief
- Robert McAndrews, Public Works Director
- Brian Carlton, Finance Director
- Rea Culwell, City Attorney

Appendix A: Implementation Plan

(To be included after creation and updated annually)



City of College Place



www.cpwa.us

This plan was created with help by:



SAGELAND STRATEGIC
WALLA WALLA, WA

City of College Place, Washington
RESOLUTION NO. 24-082

**A RESOLUTION BY THE CITY COUNCIL OF THE CITY OF COLLEGE PLACE, WASHINGTON
REGARDING DECLARING OFFICIAL COMMUNITY EVENTS FOR FISCAL YEAR 2025 FOR
THE CITY OF COLLEGE PLACE, WASHINGTON**

Whereas, the City of College Place is a non-charter code city governed by the rules and regulations of RCW 35A; and

Whereas, the City recognizes and acknowledges the importance of public special events that serve to enrich the civic, charitable, cultural, economic, entertainment, and other values of the community that enhance community identity; and

Whereas, the City further recognizes that the limited economic, staff, and other resources of the City require that the City provide City support only to those special events that uniquely promote and advance public objectives; and

Whereas, the City deems it appropriate to identify on an annual basis those Community Events which may receive City sponsorship and support; and

Whereas, the declaration of a public event as a Community Event may, at the sole discretion of the City, include provision of City resources.

Now therefore, be it resolved that the City Council of the City of College Place does hereby

Section 1. Sanction the following events as Official Community Events of the City of College Place, Washington.

- Earth Day
- Garrison Creek Clean-Up
- College Place Branding event formerly named Kenneth Rooks Field Day
- Fishing Derby at Lions Park
- Neighborhood Engagement/Outreach events as outlined in forthcoming Neighborhood Engagement and Outreach Plan
- Block Party
- College Place Farmers & Artisan Market
- Movies at the Park
- Freedom Festival
- College Place Arbor Day
- Autumn on the Avenue/Trunk or Treat
- Walla Walla Valley Veterans Day Parade
- Winterfest/Light Up the Avenue

Clerical Corrections. The City Clerk is authorized to make necessary clerical corrections to this resolution including, but not limited to, the correction of scrivener's/clerical errors, references, resolution numbering, section/subsection numbers and any references thereto.

Effective Date. This resolution shall take effect and be in full force upon its passage as provided by law.

PASSED by the City Council of the City of College Place, Washington, this 26th day of November, 2024.

Signed by:

Norma L. Hernández

EP0117EE7FEC100...

Norma L. Hernández, Mayor

Attest:

Signed by:

Maryelizabeth Garcia

TE0D0AD8E90D4C2...

Maryelizabeth E. Garcia,
City Clerk

Downtown College Place Association

Board of Directors Meeting Minutes

January 22, 2025

City of College Place Council Chambers 9:00a.m.

Present:

- DeLona Bell
- Jim Fry
- David Lopez
- Vicki Zanes
- Chloe Congleton
- Maryelizabeth Garcia

Meeting called to order by Maryelizabeth Garcia at 9:04a.m.

ORGANIZATIONAL MATTERS

- **Appointment of Temporary Officers:** Maryelizabeth elected to serve as Chairperson and Secretary for this first board meeting and unanimously accepted by all in attendance.
- **Adopt name of Organization:** After deliberation, all in attendance agreed to name the organization, "Downtown College Place Association." DeLona moved to adopt the name Downtown College Place Association. Motion seconded by Chloe and unanimously approved.
- **Review & Adoption of Organizational Structure:** The board reviewed the proposed structure and made a recommendation to place the Executive Director under the President, and the Board and Committees under the President. DeLona made a motion to accept the proposed organizational structure with aforementioned changes. Motion was seconded by Chloe and approved.
- **Review & Revision of Bylaws:** The board reviewed the proposed bylaws and made an amendment to the name of the organization, formerly Downtown College Place Foundation to Downtown College Place Association; requested to include language about board insurance executed in perpetuity; further defining the purpose of the organization to include event planning and defining College Place's downtown identity; clarification that anyone "may apply" to be a board member; and solidifying the downtown boundary as presented in the bylaws. A motion was made to accept the bylaws as presented, including the aforementioned changes, by Jim. Motion was seconded by David and approved.
- **Review & Adoption of Articles of Incorporation:** The board reviewed the proposed Articles of Incorporation. DeLona moved to accept the Articles of Incorporation as presented including the name change (Downtown College Place Association), contingent upon attorney approval. Motion seconded by Chloe and approved.

Downtown College Place Association

Board of Directors Meeting Minutes

- **Logo Design:** DeLona presented both a color logo and a black & white logo for the Downtown College Place Association. Chloe moved to accept the logo as presented, however updating the name in the logo from Downtown College Place Foundation to Downtown College Place Association. Second by Jim and approved.

BOARD STRUCTURE & ROLES

- **Appointment of Permanent Officers:** the board deliberated and clarification was made on the term limits of the founding board. The board unanimously agreed to the following appointments:
 - President: Chloe
 - Vice President: Jim
 - Secretary: Maryelizabeth
 - Treasurer: David
 - Board Members At Large: Vicki, DeLona
 - A motion was made by DeLona to appoint the above Officers as proposed. Seconded by Jim and the motion passed.
- **Board Meeting Time/Day:** the board elected to hold Board Meetings every other Wednesday at 08:00AM to accommodate the needs of board members. The hope is to meet monthly when operations get up and running.

ADJOURN

Due to time constraints, the meeting was adjourned. It was agreed upon by all that the remaining Agenda items would be discussed at the next board meeting.

Next Meeting: 2/5/2025 at 0800 at City of College Place Council Chambers

Submitted by:

Maryelizabeth E. Garcia,
DCPA Secretary

Downtown College Place Association

DCPF Board Meeting

Wednesday, 05 February 2025 @ 9:00 AM

Additions or Corrections to the Agenda

Call to Order – Report Volunteer Hours

New Business:

Board Structure & Roles

- Committee Chairs
 - Promotions & Tourism
 - Economic Vitality
 - Outreach & Organization
 - Design
- Designation of Principal Office

Operational Set-Up & Financial Considerations

- Opening a Bank Account
- Review timeline goals for 2025 operations
- Potential Funding Sources
 - City of CP – Will hear back ~Mid February
 - Pacific Power
 - Walla Walla University
 - Wildhorse Foundation – Opens 4/1/25
 - Blue Mountain Community Foundation – Opens August 2025
 - USDA Rural Business Development Grant – Closes 2/28/25
 - Columbia REA
 - Ziply/BCE Holdings
 - PocketiNet
- Social Media Accounts

Announcements & Other Discussions

Adjourn Meeting

Next Meeting: 2/19/2025 @ 0800 at City of College Place Council Chambers

Attachments:

Updated DCPA Bylaws

Updated Organizational Chart

Board Meeting Minutes from 1/22/2025

DCPA Logos

DCPA Board Membership Application

Downtown College Place Association

BYLAWS

ARTICLE I — Name and Title The name of this corporation will be the Downtown College Place Association hereafter referred to as the DCPA or Association, and its duration will be perpetual.

ARTICLE II — Offices A. Principal office: The principal office of the DCPA will be in the State of Washington, County of Walla Walla, City of College Place. Further, it will be located within the boundaries of the College Place Downtown District. B. Registered office: The registered office of the DCPA will be maintained in the State of Washington, and may be, but need not be, identical with the principal office. The address of the registered office may be changed from time to time by resolution of the Board of Directors.

ARTICLE III — Amendments These bylaws may be amended by resolution at any time by an affirmative vote of at least two-thirds of the entire Board of Directors.

ARTICLE IV — Purposes A. Organization: DCPA will organize and promote constructive relationships between local government bodies and private business and citizens. DCPA will support other charitable and educational organizations whose primary interest is to preserve and develop the beauty and economic stability of College Place. DCPA will represent the concerns of the downtown area at the city, county, and special district level. B. Promotions: DCPA will promote and sponsor discussion groups and will educate and inform citizens and members on topics of interest and concern to the downtown area. DCPA will maintain information regarding revitalization in the downtown area. DCPA will sponsor cultural, employment and commercial district revitalization activities and events in the downtown area. DCPA will provide a forum for sharing knowledge, common experiences and problems. DCPA will issue publications and information regarding its activities and other information relevant to downtown revitalization. Such publications may include the following: 1) planning studies 2) an organization brochure 3) informational brochures, maps, and guides 4) special event flyers, pamphlets, and posters 5) a newsletter C. Economic Restructuring: DCPA will help to educate and assist downtown business owners and property owners in matters of preservation, promotion, and finance. DCPA will help recruit new stores to minimize the effects of vacancies and to diversify the retail mix. DCPA will aid in acquisition of adequate financing for new and existing businesses and for renovation of historic structures. D. Design: DCPA will advocate for the planning and coordinating design of improvements in or adjacent to the downtown area. DCPA will aid in providing design services for buildings and signage. DCPA will provide information on painting, construction,

historic rehabilitation, and preservation. DCPA will promote and assist in city beautification projects. DCPA will participate in the planning and development of public interest projects in the downtown area including events. DCPA will promote effective redevelopment efforts and assist in planning for the stabilization and revitalization of the downtown area. DCPA will, whenever possible, recommend appropriate uses and design standards for downtown development compatible with historic preservation.

ARTICLE V — Powers A. General Powers: DCPA will have all powers granted by Washington law. It will also have the power to undertake, either alone or in cooperation with others, any lawful activity which may be necessary or desirable for the furtherance of any or all purposes for which the DCPA is organized. B. Investment Powers: DCPA may invest both assets secured by DCPA, and services provided by DCPA resulting in development, as program related investments. Any returns from such investment will be used by DCPA for the furtherance of any or all purposes for which the DCPA is organized. No portion of the returns will inure to the benefit of any member, Director, Officer or staff member of DCPA.

ARTICLE VI — Boundaries and Membership A. Boundaries: The primary focus area of the downtown district will be defined by State Route 125 on the south, Rose Street on the north, Bade Street on the west, as well as Birch Avenue and Ash Avenue on the east. B. Membership: Any individual, business, or organization interested in becoming a member of the DCPA can file an application for membership in such form as the Board of Directors prescribes. The Board of Directors will establish annual dues as it deems appropriate. Such establishment of dues will include method of payment. Any member may resign from membership in the Association upon giving written notice thereof to the Secretary or the Executive Director of the Association. Members who resign from membership will not be entitled to receive refund of dues therefore paid.

ARTICLE VII — Meetings A. Annual Meeting: The annual meeting for the DCPA membership and the community will be the 3rd Thursday in February or such other time as the Board of Directors may direct. Prospective attendees will be notified by either regular mail or electronic mail at the address listed on their membership application more than 30 days before the meeting convenes. The purpose of the annual meeting will be to celebrate community triumphs and announce the Board of Directors of DCPA for the following year and such other business as the Board of Directors wishes to bring. B. Special Meetings: Special meetings will be held at any time and place as may be designated in the notice of said meeting upon call of the President of the Board of Directors, a majority of the Board of Directors, or upon the written petition by at least twenty-five percent (25%) of the active membership. A notice stating the place, date, and time of meetings will be provided either by regular or electronic mail to each member at least ten days prior to the meeting. Other

interested parties will be given such notice of meetings as the Board of Directors deem appropriate.

ARTICLE VIII — Directors

A. Duties: The Board of Directors will manage, set the policy for, and oversee the management of the affairs of DCPA. They will control its property, be responsible for its finances, formulate its policy, and direct its affairs. The Board of Directors may hire an Executive Director and support personnel. The Board of Directors may enter into contracts necessary to accomplish the DCPA goals.

B. Qualifications: There will be seven (7) members on the Board of Directors. Any interested and capable member of the public may apply to become a Director. However, there must be a Director from both retail and non-retail businesses as well as a real property owner from within the primary focus area of the DCPA. There will not be a majority of any occupation on the Board. Directors must be of sound mind and of legal age. No immediate relatives may serve on the Board at any one time.

C. Term: Every Director will be elected for a three (3) year term. However, the initial Board of Directors will serve staggered terms. Directors on the initial Board will be elected by lot: three for three (3) years, three for two (2) years, and one for one (1) year until December 31, 2025. No member shall serve more than two consecutive three-year terms without stepping down from serving for at least one year.

D. Elections: Directors will be appointed by vote by the Board of Directors. Tallying of ballots will be completed, and the new Directors announced at the Annual Meeting. Every Director will have one vote for each available Director's position. Nominations to the ballot slate will be made either: 1) by petition submitted to the DCPA office more than 25 days in advance of the board meeting; or 2) by the nominating committee, which will consist of the outgoing Board members and the President.

E. Vacancies: A Director may resign at any time by giving written notice to the DCPA President, Vice President, or Executive Director. Any vacancy in the Board occurring because of death, resignation, refusal to serve, or otherwise will be filled for the unexpired term by action of a majority of the remaining Directors. Three consecutive unexcused absences from regular Board of Directors' meetings is subject to vacancy.

F. Meetings: The Board of Directors will meet at least monthly. The President and/or any three Directors may call a meeting of the Board. At a duly called meeting of the Board of Directors, five (5) members will constitute a quorum. All business of the Board of Directors will be transacted at a duly called meeting of the Board.

G. Compensation: Directors will receive no compensation for their services as Directors, but the Board may, by resolution, authorize reasonable reimbursement for expenses incurred in the performance of their duties. Nothing herein will preclude a Director from serving DCPA in any other capacity and receiving reasonable compensation for such service.

H. Liability: Directors will not be personally liable for the Association's debts, liabilities, or other obligations.

ARTICLE IX — Officers A. Number of Officers: DCPA will have a President, Vice President, Secretary, Treasurer, and such additional officers as the Board of Directors may from time to time designate. Each officer will serve a one-year term. Officers will be elected by the Board of Directors at the first Board meeting of the year. B. Duties of President: The President will preside at all meetings of the Board of Directors and at the annual meeting ending his or her term of office. The President will be entitled to the same vote as any other Director. The President shall sign all checks and documents pertaining to DCPA for which the President's signature is necessary or desirable. C. Duties of Vice President: In the absence of the President, or his or her inability to act, the Vice President will possess all the President's powers and discharge all Presidential duties. D. Duties of Secretary: The Secretary will record and maintain a full and correct record of the proceedings of DCPA. The Secretary may sign documents necessary for DCPA and will perform such other duties as the Board may from time to time direct. E. Duties of Treasurer: The Treasurer will maintain in good order all financial records of the Association. The Treasurer may sign checks for the DCPA. At regular Board of Directors meetings, the treasurer will provide a report and summary statement on the financial affairs of DCPA. F. Temporary Officers: In cases of absence or disability of an officer of the Association, the remaining Officers may vote to delegate the powers and duties of such officer to any other officer or member of the Board.

ARTICLE X — Committees DCPA will have the following standing committees: 1) Organization, 2) Promotion, 3) Design, 4) Economic Vitality. DCPA will also have such other committees as the Board of Directors may from time to time establish. Committees will report monthly to the Board of Directors. At least one Director will serve on every committee. Committees will be appointed by the President with the approval of the Board of Directors. Committees need not be limited in membership to DCPA members but can have representatives from other relevant areas of the community.

ARTICLE XI — Finances and General Provisions A. The fiscal year of the Association will begin on the first day of January, and end on the last day of December in each year. On the first year of incorporation, the fiscal year will begin upon incorporation and end on the last day of December. B. Except as the Board of Directors may otherwise authorize, all checks, drafts, and other instruments used for payment of money and all instruments of transfer of securities will be signed by the Treasurer and the President, or by the Treasurer and the Executive Director. In the absence of the Treasurer, the President and the Executive Director may sign in the place of the Treasurer. C. Within two months after the close of the fiscal year, the Treasurer will prepare a yearend financial statement showing in reasonable detail the source and application of the previous year's funds and the financial condition of the Association. This statement will be presented to the Board of Directors at a regular board

meeting. D. Every year, the Board of Directors will possess updated board insurance and adequate organizational insurance.

ARTICLE XII — Corporate Seal DCPA will have no corporate seal.

ARTICLE XIII — Indemnification A. DCPA may indemnify any Officer or Director, or a former Officer or Director, their heirs or assigns, for any and all judgments, settlement amounts, attorney's fees, and litigation expenses incurred by reason of his or her having been made a party to litigation due to his or her capacity or former capacity as Officer or Director of DCPA. DCPA may advance expenses where appropriate. Payments of Indemnification shall be reported at the next annual meeting. The provisions of this section apply to any cause of action arising prior to the adoption of these bylaws also. The rights of indemnification set forth herein are not exclusive. B. An Officer or Director is not entitled to indemnification if the cause of action is brought by DCPA itself against the Officer or Director, if it is determined in judgment that the Officer or Director was derelict in the performance of his duties, or had reason to believe his or her action was unlawful. C. No Director, trustee, or any uncompensated officer of the DCPA will be personally liable to the corporation or its members for monetary damages for conduct as a Director, trustee, or any uncompensated officer provided that this Article will not eliminate the liability of a Director or any uncompensated officer for any act or omission occurring prior to the date when this Article becomes effective and for any act or omission for which elimination of liability is not permitted under the Washington Non-profit Corporation Act.

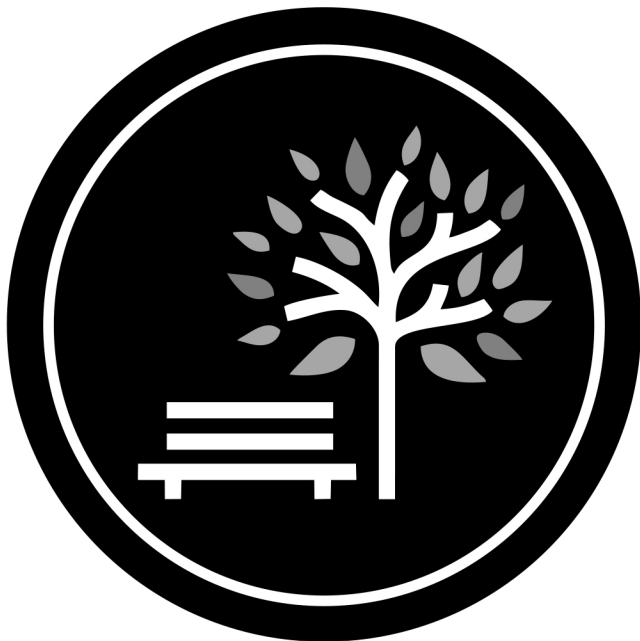
ARTICLE XIV — Amendments A. The Board of Directors shall have the power to alter, amend, or repeal the bylaws or adopt new bylaws by a quorum vote at a duly called meeting of the Board, provided that no such action will be taken if it would in any way adversely affect the DCPA's qualifications under the Internal Revenue Code or corresponding provisions of any subsequent Federal tax law. This document is a complete and correct copy of the DCPA's bylaws, adopted by the Board of Directors on this date, January 22, 2025, and are now in effect.

Maryelizabeth E. Garcia,

Board Secretary, 2/5/2025



**DOWNTOWN
COLLEGE PLACE
ASSOCIATION**

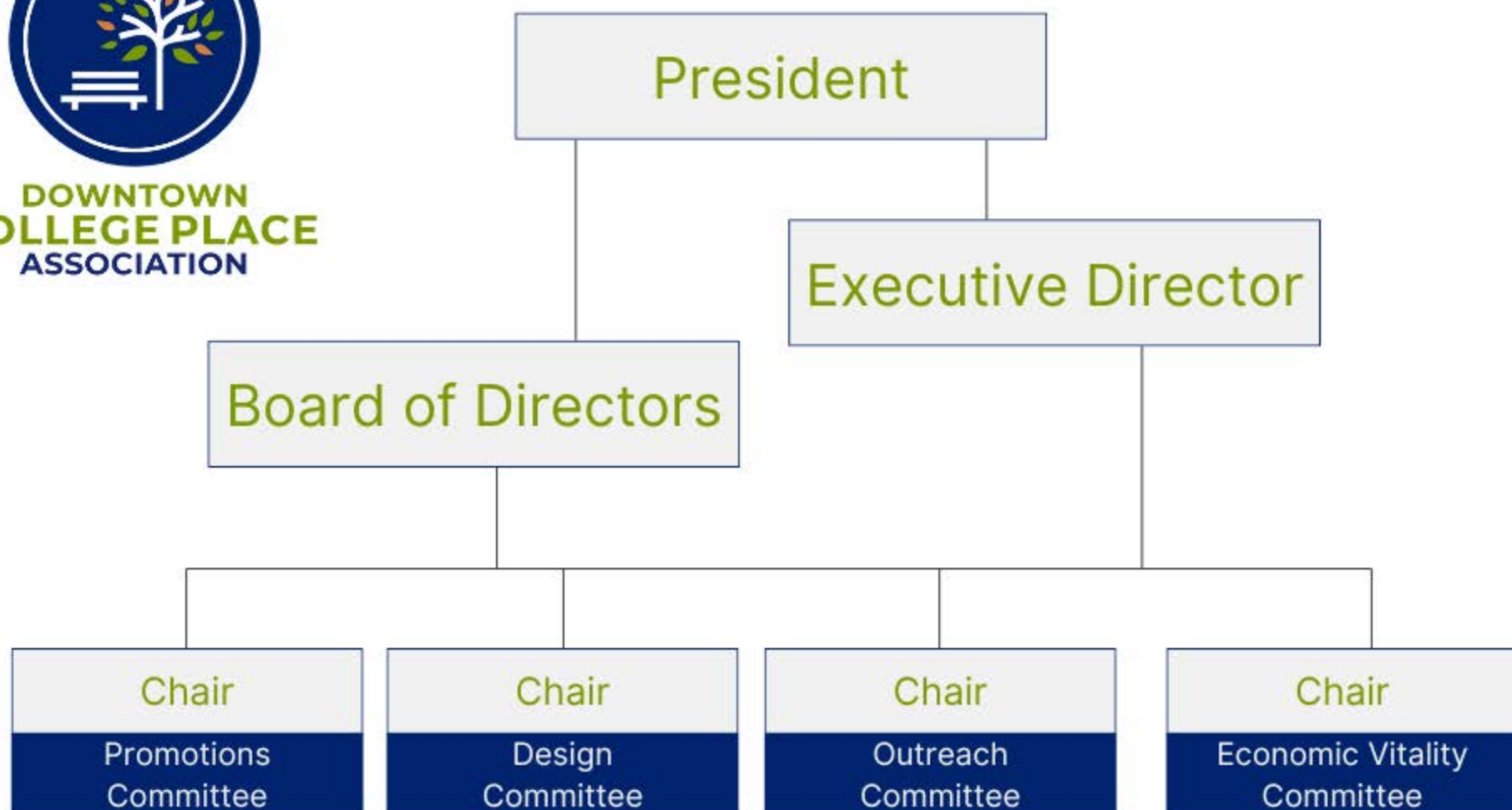


**DOWNTOWN
COLLEGE PLACE
ASSOCIATION**

DCPA Organizational Chart



**DOWNTOWN
COLLEGE PLACE
ASSOCIATION**





Downtown College Place Association

Board Membership Application

**DOWNTOWN
COLLEGE PLACE
ASSOCIATION**

Candidate Info

Company Name (if applicable): _____

First Name: _____ Last Name: _____

Title: _____ Phone: _____ Email: _____

Address: _____

City: _____ State: _____ Zip code: _____ County: _____

Why would you like to be a Board Member? _____

What other affiliations do you have in the community? _____

The Boards of Directors is the governing and policy-making body of the Downtown College Place Association. They authorize the annual program of work, approve the budgets, receive and act on Committee recommendations, and direct the general operation of each organization. Four members of the Board will be appointed to the Executive Committee.

General Board Membership Responsibilities

- Attend Board Meetings
- Serve on at least one Committee per year (Promotions/Tourism, Design, Economic Vitality)
- Create an active presence in the community through helping, attending, and supporting activities as needed
- Attend the Annual Board Retreat in January- a ½ day retreat to plan for the coming year
- Be on alert for new businesses and serve as a liaison to the community

Please Note: Three unexcused absences from Board Meetings may result in removal from the Board

Signature

Sign: _____ Print: _____

Thank you so much for considering this leadership role within our Organization and our community!

City of College Place: Development Activity - February 2025				
Project Name	Use	Location	Status	Lead Generated
Commercial/Industrial				
Project Murph	Gas Station	Meadowbrook	- June 2024 Interested in establishing gas station in outlot of Walmart. - August 2024 Getting permission from corporate. - February 2025 Planning to turn in site plan soon.	ICSC Las Vegas
Project Palouse	Commercial Developer	South College Avenue	- June 2024 Interested in partnering with Lakeside and buying properties along South College (south of Mojonner) - February 2025 Continuing due diligence.	ICSC Las Vegas
Project Cobble	Hotel	Whitman & Myra	- working out development agreement with property owner. Still trying to hammer out road access. - February 2024 Still working out development agreement. - May 2024 Purchase and Sale agreement in place. Dependent upon roundabout. - September 2024 Gave them new Hotel Study. Going after TIB roundabout grant. - February 2025 Roundabout grant didn't get awarded. City is self funding engineering of roundabout.	ICSC Las Vegas

Project LK	Senior Assisted Living	Myra & Garrison Village Way	-February 2025 Assisted Living operator interested in buying vacant parcel on northwest corner for development of senior village.	Developer on another project in town.
Project Bullseye	Big Box	Whitman & Myra	- March 2024 Option agreement exists. - February 2025 Tied to project Cobble and its success.	ICSC Las Vegas
Project OPH	Breakfast Restaurant	Whitman & Myra	- November 2023 Option for breakfast restaurant. Dependent upon hotel. -March 2024 Signed agreement based on hotel coming in adjacent. -February 2025 Tied to Project Cobble.	Property Owner.
Project DE	Brunch Restaurant	Meadowbrook	- June 2024 Interested in serving market. - September 2024 Doing site evaluations. - February 2025 Awaiting Myra porkchop removal before making offer.	ICSC Las Vegas
Project Y	Grocer	Whitman & Myra	- June 2024 Is going to Board of Company for site approval. -February 2025 On back burner for now. Operator is trying to sell store up in Spokane area and use funds to do new store here. In process.	Cold Call

Project MP	Hotel	Meadowbrook	- August 2024 Doing due diligence. - February 2025 Getting together investors.	ICSC Las Vegas
Project Smile	Industrial	West Whitman Drive	- February 2025 Due diligence on warehousing and production.	Cold Call
Project FM	Medium sized grocery and general merchandise store.	College Avenue, across from College Place High School.	- June 2024 Continue monitoring progress of Lakeside development before making decision. - February 2025 Evaluating property near SR 125 and College.	ICSC Las Vegas
Project Flight	Aerospace	Martin Airfield	- Nov 2023 Project is now annexed into the City. Working with property owner on future planning. - August 2024 Working with developer via State CERB Grant for infrastructure planning. - November 2024 Aiming to have study completed by end of year. - February 2025 Study should be done by March. Starting negotiations on development agreement.	Property owner.
Residential				
Homestead Subdivision Phase 3C, 3D, and 3E.	Residential subdivision constructed by Hayden Homes.	Homestead and Doans Street south of Fourth Street.	- Dec 2022 Wise size development got moved to next Spring. -Feb 2025 Will start to develop wise size once done with Avery Estates in WW.	Hayden Homes has owned property for the last decade.

NW Residential	20 Apartments	SW Oakwood Pl off of SW 6th	- June 2024 Going through entitlement process. - July 2024 Company decided to buy eight homes on market in town to rehab and will be putting site with plans up for sale. - February 2025 Expecting plan submittal by Summer.	NW Residential Properties
Villages at Fort Walla Walla	180 multi-family apartment units.	South side of Whitman Drive/Deccion intersection.	- Jan 2019 Plan submittal is being reviewed by development staff. Spring 2019 construction. - Nov 2022 Revizing development plans. Likely will develop in 2023. - June 2024 Getting last minute additional financing to make reality. - September 2024 - Under deadline by end of September to get something out of the ground to fall in old building codes. - October 2024 Purchased permitting for first structure. - February 2025 No update.	Port of Walla Walla was approached by Farran Group about property and was directed to Bob Price and the City.

Sirmon Development	Multi-family apartments.	942 NE Spitzenburg St	- Jan 2019 Plan submittal is being reviewed by development staff. - April 2021 Awaiting final engineering drawings. - Dec 2022 Project appears to be on ice for now. Tad asked about vesting rights. - Feb 2024 Talked to developer. Expecting dirt to be turned this year. -August 2024 Buildings are being built. - October 2024 In Construction.	Property owner.
Lakeside/College Holdings Development	Single & Multi-Family	197 Mojonnier Rd	-August 2024 Expecting Master Planned Development application is planned for July 2024. Engineering on East-West Rd has started. - September 2024 Master Planned Development Application filed. Staff reviewing. - February 2025 Turned in applicaiton materials for staff review, also early development agreement.	Property owner.

Villages at Garrison Creek Phase 11 and 13	Single Family	Villages at Garrison Creek development.	- December 2021 Received submittal for 72 lot single family in vacant middle donut hole to finish up development. - Sept 2023 Engineer for developer is working on site issues. - Dec 2023 Expecting infrastructure to go in soon. - May 2024 Infrastructure being installed. -October 2024 Still working on site infrastructure. - November 2024 Getting ready to file plats. - February 2025 First permits filed.	Property developer.
Deer Meadows Subdivision	Townhome	SW 12th	- December 2021 Developer Jeff Kelly out of Tri Cities is planning townhomes for site purchased from Marc Maiuri - Sept 2022 SEPA out now. 13 lot subdivision proposed by Jeff Kelly out of Pasco. - October 2022 Hearing Examiner meeting held. - December 2022 Going through final entitlements. - February 2023 Planning for a Summer start. - May 2024 Have turned in plans for grading permits. - October 2024 No Update.	Developer

Martin Airfield/Tarrgon Development	Airfield Update, Flex Facilities, Residential	West Whitman Drive	- Feb 2024 Project is now annexed into the City. Working with property owner on future planning. - May 2024 Martin Airfield study is starting. - July 2024 Working with City on area study. Also, Tarragon bought Hinshaw Ranch property. - February 2025 Early negotiations on development agreement.	Developer
Project Dairy	Residential	West Whitman Drive	- August 2024 Discussions with land owner about possible inclusion into UGA next time it opens for residential.	Land Owner
Project Sod	Residential	Wallua Avenue	- August 2024 Property owners wants to do affordable housing. Wants into UGA next time it opens up.	Land Owner

Salerno Estates	Single Family Homes	359 SW 12th	- May 2023 Had public comment period for this development. 8 homes on approximately half acres. Reviewing comments and finalizing conditions of approval. - June 2023 Site plans approved. Past appeal period. - Dec 2023 Working with developer on issues. - Feb 2024 Infrastructure plans getting turned in. - March 2024 Expecting construction to start soon. - May 2024 Working on site utilities. - August 2024 Working on area utilities. - November 2024 Continuing development.	Developer
-----------------	---------------------	-------------	---	-----------