



Carlsborg UGA Economic Profile September 2011

PRESENTED BY:
CLALLAM COUNTY ECONOMIC DEVELOPMENT COUNCIL AND
CARLSBORG BUSINESS AND PROPERTY OWNERS ASSOCIATION

Carlsborg UGA Economic Profile

Clallam County Economic Development Council and the Carlsborg Business and Property Owners Association

ECONOMIC PROFILE OVERVIEW

A) General: The Carlsborg UGA is an emerging economic force in Clallam County

- The Carlsborg UGA currently has 113 businesses, 4.7% of all business establishments operating in Clallam County.
- The current population of Carlsborg is approximately 1,147, 1.7% of the County’s overall population according to the 2010 census designated place (CDP). According to the Office of Financial Management (OFM) the Carlsborg population within the UGA was 842.

B) Labor Sectors: The UGA has a unique concentration of Manufacturing Firms

- UGA manufacturing employs 112 full-time individuals, 7.3% of Clallam’s manufacturing sector.
- UGA construction firms employ 10% of Clallam County’s entire construction workforce.
- UGA retail comprises 7% of Clallam County’s retail workforce.

C) Wages and Employment: In 2009 Carlsborg supported approximately 1050 Jobs

- Approximate gross wages for Carlsborg employees in 2009: \$17,000,000.
- Over 95% of the Carlsborg workforce commutes to the UGA from the outside.
- Per capita wages for workers in the UGA is 10.6% greater than the Clallam County average.

D) Tax Generation: Since 2006 through 2010 UGA firms have paid over \$66 million in state and county sales taxes

- UGA tax generation for Clallam County is increasing at an annual rate of 4.9%.
- The Carlsborg UGA tax generation has increased 61% since 2000.
- 2010 County tax contribution: \$313,828, 7.9% of total unincorporated county tax revenue.

E) Sales: Since 2006 through 2010 UGA based firms have generated close to \$2 billion in goods and services

- In 2010 Carlsborg UGA posted estimated Gross Sales in excess of \$300 million.
- Gross Sales increased by roughly 110% during the past decade.

F) Growth: Carlsborg population has grown by 90.5% since 1990

	Carlsborg	Clallam County
Population Growth from 2000 - 2009	34.2%	5.5%
Average Annual Population Growth Rate	3.3%	0.5%
Average Annual Employment Growth Rate	3.7%	0.8%
Employment Growth 2002 - 2009	28.8%	7.0%

I. INTRODUCTION

Created and defined by Clallam County Ordinance 31.03.350 ten years after the passage of Washington's 1990 Growth Management Act, the Carlsborg Urban Growth Area (UGA) serves as the focal point of industry within Carlsborg, and a leading economic catalyst within Clallam County as a whole. Further economic development, however, is currently hampered by the lack of a unified public sewer system, a critical requirement of any UGA. As reported in the 2007 *Sewer Feasibility for Carlsborg UGA*, "land use development at urban densities... cannot be achieved with onsite sewage systems. A public sewer system will be required."¹ As this report seeks to illustrate, the infrastructure development necessary for the creation of public sewer system is certainly justified on economic grounds, to speak nothing of environmental, geohydrological, and health concerns.

II. ECONOMIC PROFILE

A) General

Strategically located to the east of the metropolitan expanse of Port Angeles, and west of the growing city of Sequim, the Carlsborg UGA is uniquely positioned to utilize the economic potential of Clallam County. The UGA currently boasts an estimated 113² firms within its borders³, roughly 4.7%⁴ of the 2,426⁵ business establishments operating in all of Clallam County. As the following metrics show, Carlsborg is a leading emerging force in the Clallam County economy, one that cannot be ignored.

B) Labor Sectors

Unique amongst Clallam County is the concentration of manufacturing firms located within the UGA, which in 2009 employed an estimated 112⁶ full-time individuals, roughly 18.4%⁷ of all those employed in Carlsborg. This share of manufacturing within the UGA, is over twice⁸ the county average. Furthermore, Carlsborg's powerful manufacturing sector represents 7.3%⁹ of Clallam County's entire manufacturing employment despite having only 1.7%¹⁰ (if using the OFM number for just the UGA this would be closer to 1.2%) of the overall population and 3.0%¹¹ of the workforce according to 2009 statistics. Overall UGA full time employed individuals is 608. After taking into account owners, part time and seasonal workers the number of employed is 1049. Significant concentrations of construction and retail firms are approximately 10%¹² and 7% respectively¹³.

¹ *Sewer Feasibility Study for Carlsborg UGA*. Issue brief. Seattle: BHC Consultants LLC, 2007

² Carlsborg UGA Firms Consolidated List

³ Attachment C

⁴ Compiled FactBook, Page 2, Statistic #11

⁵ Compiled FactBook, Page 2, Statistic #9

⁶ Compiled FactBook, Page 6, Statistic #86

⁷ Compiled FactBook, Page 6, Statistic #87

⁸ Compiled FactBook, Page 6, Statistic #91

⁹ Compiled FactBook, page 6, Statistic #88

¹⁰ Compiled FactBook, Page 7, Statistic #138

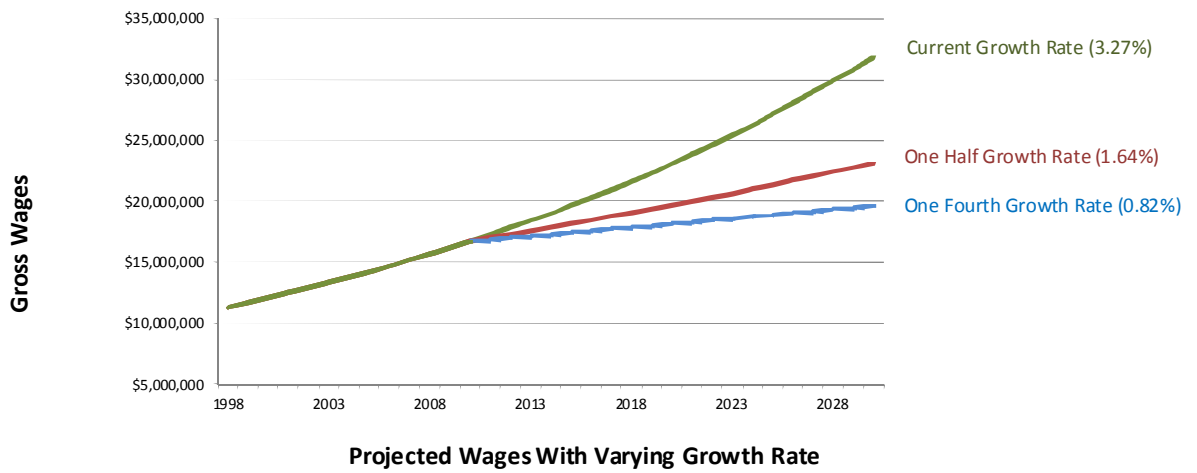
¹¹ Compiled FactBook, Page 3, Statistic #27

¹² Compiled FactBook, Page 6, Statistic #93

¹³ Compiled FactBook, Page 6, Statistic #90

C) Wages and Employment

With conservative statistics placing Carlsborg employment at 608 FTEs in 2009¹⁴, and more recent surveys indicating total employment at 1049¹⁵ for full time and part time employment, Carlsborg has grown considerably since its early years as a small logging town¹⁶. Furthermore, 93%¹⁷ of those working in Carlsborg are believed to be employed in primary jobs. A close examination of in-area employment efficiency data reveals a Carlsborg that is a potent driver of the County economy, with close to 590¹⁸ workers, over 95%¹⁹ of the entire Carlsborg based workforce, commuting to the UGA from the outside.



Such labor data indicates employment opportunities that are above Clallam County average with respect to both their compensation and quantity. These indications are substantiated by an analysis of wage statistics, which reveal a per capita income for workers in the Carlsborg UGA that was 10.6%²⁰ greater than the County average in 2008.

¹⁴ Compiled FactBook, Page 3, Statistic #22
¹⁵ Compiled FactBook, Page 3, Statistic #25
¹⁶ Clallam Work Area Profile Report. PDF. OnTheMap. U.S. Census Bureau Center for Economic Studies
¹⁷ Compiled FactBook, Page 7, Statistic #140
¹⁸ Compiled FactBook, Page 3 Statistic # 30
¹⁹ Compiled FactBook, Page 3, Statistic #31
²⁰ Compiled FactBook, Page 5, Statistic #78



While it is clear Carlsborg is a net generator of employment (most of the employees live outside the UGA), the created employment opportunities are dependent upon future economic prospects within the Carlsborg UGA, which are in turn contingent upon the stabilization of the Carlsborg UGA.

D) Tax Generation

The imposition of UGA status upon Carlsborg has been a clear boon from the standpoint of County tax revenue coffers. With Carlsborg's contribution to Clallam County tax revenue increasing at an annual rate of around 4.9%²¹ between 2000 and 2010, the Carlsborg UGA has seen sales tax generation increase by over 60%²² since the creation of the UGA in 2000. According to 2009 figures released by the County, Carlsborg's County sales contribution of \$312,068²³ is a substantial 7.9%²⁴ of total unincorporated Clallam County tax revenue. This share is even more considerable on a per capita share, as Carlsborg holds close to only 1.7% of the Clallam County populace based on CDP (it would be less based on the OFM population number). As can be seen in a cursory examination of sales and tax data, this tax generation will increase only if we can maintain the full status of the UGA .

E) Sales

Despite the moratorium and recent recession, the Carlsborg UGA posted an estimated 2010 gross sales of well over \$300²⁵ million according to recently released data from the Washington State Department of Revenue. This is however, hardly the limit of Carlsborg's economic potential. Carlsborg is growing at a rapid pace, with 2010 gross sales increasing by almost 110%²⁶ when compared to 2000. Over the past five years, UGA based firms have generated close to \$2 billion²⁷ worth of goods and services, paying over \$66 million in total state and county sales taxes over the same period. Consequently, Carlsborg's sales tax contribution to the County Treasury has increased by 61%²⁸ since the formation of the UGA in 2000.

²¹ Compiled FactBook, Page 4, Statistic #61
²² Compiled FactBook, Page 4, Statistic #60
²³ Compiled FactBook, Page4, Statistic #51
²⁴ Compiled FactBook, Page 4, Statistic #63
²⁵ Compiled FactBook, Page 4, Statistic #59
²⁶ Compiled FactBook, Page 4, Statistic #66
²⁷ Compiled FactBook, Page 4, Statistic #65
²⁸ Compiled FactBook, Page 4, Statistic #60

F) Growth

Additional evidence of Carlsborg's CDP growth can be gathered from an analysis of population and employment trends within the UGA. With a 2009 population estimate of 1147²⁹, Carlsborg has grown by 34.2%³⁰ since 2000, at an average annual growth rate of 3.3%³¹ per year, over six times the comparable Clallam County annual population growth rate of .5%³² per year. Since 2002 Carlsborg has seen its employment increase at an average annual growth rate of 3.7%³³. Total employment gain over the same period was about 28.8%³⁴. By contrast, Clallam County as a whole only saw a moderate increase in employment over the same period of just over 7.0%, with an annual percentage increase of only 1%³⁵ per year. As seen in the previous subsections, Carlsborg has realized growth by nearly every conceivable metric, with advancement in wages, tax generation, sales, population, employment and NAICS sector diversity.

III. POTENTIAL OUTCOMES – ADDRESSING THE QUESTION:

IS THE UGA IMPORTANT TO THE CURRENT AND FUTURE CLALLAM COUNTY ECONOMY?

A) Proceed With Sewer Expansion

Should a unified sewage system be created following the recommendations of the Carlsborg Capital Facilities Plan, it would permit a reinstatement of UGA rules associated with the 1992 Growth Management Act. This would allow Carlsborg to retain its diverse zoning and develop at a trajectory not seen since the imposition of the interim controls. With the interim controls lifted, firms would be allowed to develop and expand new light industry, commercial, retail, and cottage businesses. Existing businesses would be able to physically expand, allowing them to add additional employees and contribute a greater share to County Tax revenues. On parcels with current single family constructs, "mixed-use" buildings could be constructed, and owners of lots currently zoned for single-family use could build approved retail and other non-residential structures. Such development and the accompanying benefits will not, however, be strictly limited to the Carlsborg business community. Residents of the UGA and surrounding areas would benefit from the addition of amenities and services within Carlsborg.

B) Delay Sewer Expansion

Should it be decided that Carlsborg is noncompliant by the GMA Hearings board due to its lack of a unified sewer system, the vast majority of the Carlsborg UGA will have zoning changed to a Rural Low (R5) or Rural Neighborhood Conservation (NC) designation. A return to such a designation would reduce the UGA into "a low density rural setting free from commercial, industrial, and moderate density residential development."³⁶ Current firms operating in the UGA would be stopped from expanding and placing their long term economic viability at serious risk. With other potential industrial sites located in unincorporated Port Hadlock-Irondale in nearby Jefferson County, it seems likely that many firms may consider relocation, taking both employment and county revenue with them.

²⁹ Compiled FactBook, Page 7, Statistic #132

³⁰ Compiled FactBook, Page 7, Statistic #141

³¹ Compiled FactBook, Page 7, Statistic #142

³² Compiled Factbook, Page 7, Statistic #107

³³ Compiled FactBook, Page 7, Statistic #137

³⁴ Compiled FactBook, Page 7, Statistic #136

³⁵ Compiled FactBook, Page 7, Statistic #104

³⁶ Clallam County. Department of Community Development. Planning Division. CCC 33.10.020, Rural Low (R5). Print.

IV. COST ESTIMATIONS

At the time of this report's writing, no official cost has been attached to the project by either the Public Utility District or Clallam County. Several estimates, however, have been produced by a variety of governmental and non-governmental sources. Two different costs of \$13,700,000 and \$13,000,000, adjusted to 2010 relative values, appear in the PUD's *Sewer Feasibility Study for Carlsborg UGA*. However, Tom Martin, Clallam County Public Utility District Assistant Supervisor of Water and Wastewater, estimated the cost at closer to \$15 million in 2010, stating that PUD estimates were "a moving target"³⁷. Engineering management firm BHC consultants projected an adjusted total cost of \$15,200,000 in 2009. Finally, the Washington State Department of Commerce Public Works Trust Fund estimated the total cost at \$14,825,200 in 2010³⁸. Taken together, the average of these estimates results in an adjusted sum of \$14,345,040.

V. FUNDING RESOURCES

A) Community Economic Revitalization Board (CERB) Loan

Possibly the largest source of potential funding, a CERB loan is "focused on creating and retaining jobs in partnership with local government."³⁹ Due to Carlsborg's job efficiency metric, and its manufacturing concentration, it seems likely that Carlsborg would qualify for such a loan. The application and hearing process is set four times a year. Changes are currently being discussed within the CERB funding that may include some grants.

As of June 30th, CERB's contribution to a potential sewer program is estimated at \$5.5 million with a final estimate planned for release on August 31st of this year. One key stipulation of the board is that the jobs created by an investment exceed, on average, Clallam County's \$17.28 median wage. Additionally, the application for a CERB loan requires a completion of a "Feasibility Threshold Criteria", and an identification of a target industry. Some of the work has been completed for the Feasibility Threshold Criteria by Bainbridge Graduate Institute interns as of June 2011. This funding requires that most of the sewer/water infrastructure be in place and the CERB funded portion of the project would occur within the subsequent six months.

B) State Community Development Block Grant (CDBG)

Based upon the Carlsborg 's 2000 census designation as a "distressed" economy, with more than 51% of the populace belonging to the low to moderate income bracket, Carlsborg could qualify for a CDBG. The grant requires that no less than 70% of the funds provided must be used for initiatives that benefit the low to moderate income brackets, which the sewer project would certainly fulfill. Specifically, allocated funds are directed to an end-term usage that would prevent the emergence of slums, or address an "immediate threat to the health or welfare of the community."⁴⁰ The grant, which could potentially contribute up to \$1 million, must be

³⁷ Winters, Amanda. "Carlsborg Sewer Still on Wish List." *Sequim Gazette*. 26 May 2010. Web.

³⁸ 2012 Recommended Construction Loan List. Public Works Trust Fund, 16 Dec. 2010. PDF

³⁹ Community Economic Revitalization Board. "Choose Washington." Washington State Department of Commerce. Web. <<http://www.choosewashington.com/business/financing/revitalization>>

⁴⁰ "Community Development Block Grant Program." U.S. Department of Housing and Urban Development (HUD). Web. <<http://portal.hud.gov>>

applied for in November in order to qualify for a February/April disbursement. An Income Survey is necessary if 2010 census data is not available. The 2010 Census will define a Carlsborg tract and may not be available until December, therefore, requiring a “manual income survey.”

C) Federal Economic Development Administration (FEDA)

While holding an initially small disbursement of \$300,000, grants from the FEDA have the potential of growing to much larger quantities should the original disbursement be deemed properly spent by FEDA auditors and economists. The application process for the FEDA grant is based largely on anecdotal, rather than statistical analysis, and could be completed and filed at any time. Federal funding availability could be jeopardized by federal budget issues.

D) Federal USDA Rural Development

An open application loan, the USDA Rural Development fund seeks to “fund the development of essential community facilities for public use in rural areas.”⁴¹ The loan, charged at the prime rate, would only apply to development related to sewer hookups, however no income survey is required, thus greatly simplifying the application process.

E) Other Potential Funding Resources

Other funding sources may be pursued in order to help bridge the estimated \$2 to \$4 million gap in capital financing. Possible sources include the Puget Sound Partnership, the U.S. Economic Development Administration’s (EDA) Revolving Loan Funds (RLF) and the Public Works Trust Fund, which has already pledged a \$10 million loan to the project. The Puget Sound Partnership, an alliance forged between scientists, firms, citizens, tribal authorities, governments and citizens aims to “identify and prioritize actions and projects needed to support a healthy Puget Sound ecosystem.”⁴² The U.S. Economic Development Administration’s RLF program would specifically cater to Carlsborg’s need for a flexible and continuing source of financial capital, as Carlsborg falls under the EDA’s jurisdiction as an “economically distressed” community. Taken together, these sources are necessary if the partnership of public and private spheres is to ensure the long-term economic stability and growth of the Carlsborg area.

VI. A WAY FORWARD

Looking to the future, it is clear that the Carlsborg UGA represents a significant asset to both Clallam County and the people of Carlsborg. Despite the initial costs associated with any capital development project, it is more than likely that financing should exist to fund the initial stages of a unified public sewer system within the UGA. As previously identified by the County, economic development of the Carlsborg UGA, the only non-municipal UGA in eastern Clallam County, is a priority moving into the next decade. A number of commercial and residential property parcels found within the UGA are ripe for expansion and may qualify for financial assistance and loans from regional lenders and developers⁴³.

The residential homeowners and businesses in the Carlsborg area need a solution to the current issue as the significance of protecting property rights, water quality, jobs and wages cannot be overlooked. They need a sustainable solution that removes the unknown and ambiguous nature

⁴¹ *Community Development*. United States Department of Agriculture. Web. 18 July 2011. <http://www.rurdev.usda.gov/Community_Development.html>.

⁴² *About the Partnership*. *Puget Sound Partnership*. Web. <<http://www.psp.wa.gov/aboutthepartnership.php>>.

⁴³ *Sewer Feasibility Study for Carlsborg UGA*. Issue brief. Seattle: BHC Consultants LLC, 2007.

of our current UGA status. As this economic profile indicates, the activity occurring in the Carlsborg UGA should be of importance to all of us in Clallam County.


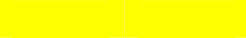

Although a complicated issue, the available economic data supports the conclusion that the UGA has been good for Carlsborg, as well as for Clallam County. With its historic land use as a logging community during its emerging years, and its current diversity of firms, Carlsborg has been, and continues to be, a potent economic force within the greater economy of Clallam County. Carlsborg provides employment for hundreds of employees, the vast majority of whom commute from outside of the UGA for the opportunity to work its factory floors, farms, and commercial establishments at wages that on average exceed those offered in the rest of the County. These Carlsborg business establishments seek a fair solution in concert with residents that would protect the legal property rights of citizen and owner alike, while continuing to provide for those that depend upon the area of Carlsborg.

Attachment A: Compiled FactBook

I. PREFACE

This attachment comprises the entirety of all statistics used in the Carlsborg UGA Economic Profile. The Compiled FactBook includes statistics that are provided by a variety of state and federal agencies, as well as calculated values, which use the state and federal statistics as the base variables. As a cursory examination of the Compiled FactBook reveals, multiple estimates for some variables exist from a variety of reputable sources. It was the general rule in compiling this FactBook to give the preference of credibility to Washington State and Clallam County sources, due to their proximity to the UGA and local expertise.

The FactBook is arranged in such a fashion that it sorts data first by a “Statistic #”, which provides a reference to the footnotes used in the Carlsborg UGA Economic Profile. The FactBook also lists the title of the datum, its value, its corresponding year, and its source. Some values are also color coded to provide further information on its source.

	= A Calculated Value
	= A Statistic Subset
	= Provided by Carlsborg Business and Property Owners Association

II. FIRMS

Clallam County				
Statistic #	Year	Item	Value	Source
1	2007	Clallam Total number of firms	6,845	http://quickfacts.census.gov/qfd/states/53/53009.html
2	2008	Clallam Private nonfarm establishments	2,264	http://quickfacts.census.gov/qfd/states/53/53009.html
3	2008	Clallam County Total Number of Firms	2,472	http://www.clallam.org/info/documents/Profile2009Complete.pdf
4	2005	Clallam County Avg Number of Business Establishments	2,362	QCEW program, provided by WA ESD
5	2006	Clallam County Avg Number of Business Establishments	2,448	QCEW program, provided by WA ESD
6	2007	Clallam County Avg Number of Business Establishments	2,472	QCEW program, provided by WA ESD
7	2008	Clallam County Avg Number of Business Establishments	2355	QCEW program, provided by WA ESD
8	2009	Clallam County Avg Number of Business Establishments	2415	QCEW program, provided by WA ESD
9	2010	Clallam County Avg Number of Business Establishments	2,426	QCEW program, provided by WA ESD

Carlsborg UGA				
Statistic #	Year	Item	Value	Source
10	2010	Carlsborg Total number of firms	113	WAESD Consolidated List. Eliminated redundant and defunct firms.
11	2010	Carlsborg Firms as a share of Clallam Firms	0.0465787	Divided 113 Carlsborg Firms by 2426 Clallam Firms to obtain share.

III. EMPLOYMENT

Clallam County				
Statistic #	Year	Item	Value	Source
12	2008	Clallam County Total Employed	28,030	http://www.clallam.org/info/documents/Profile2009Complete.pdf
13	2007	Clallam County Total Employed	28,490	http://www.clallam.org/info/documents/Profile2009Complete.pdf
14	2009	Clallam County Total Employed	20,254	http://lehdmap.did.census.gov/
15	2008	Clallam County Total Employed	20,362	http://lehdmap.did.census.gov/
16	2007	Clallam County Total Employed	21,030	http://lehdmap.did.census.gov/
17	2006	Clallam County Total Employed	20,727	http://lehdmap.did.census.gov/
18	2005	Clallam County Total Employed	20,054	http://lehdmap.did.census.gov/
19	2004	Clallam County Total Employed	19,603	http://lehdmap.did.census.gov/
20	2003	Clallam County Total Employed	18,820	http://lehdmap.did.census.gov/
21	2002	Clallam County Total Employed	18,923	http://lehdmap.did.census.gov/

Carlsborg UGA				
Statistic #	Year	Item	Value	Source
22	2009	Carlsborg Total Employment (All Jobs)	608	http://lehdmap.did.census.gov/
23	2009	Carlsborg Total Employment (All Jobs)	540	Labor Market & Economic Analysis, ESD, Wage Analysis Spreadsheet
24	2010	Carlsborg Total Employment (All Jobs)	546	Labor Market & Economic Analysis, ESD, Wage Analysis Spreadsheet
25	2009	Carlsborg Total Employment (All Jobs)	1049	Survey by: Carlsborg Business and Property Owners Association
26	2010	Carlsborg Total Employment (All Jobs)		
27	2009	Carlsborg Employment as % of County Employment	0.0300188	Divided 608 Carlsborg workers by 20254 Clallam County workers

29	2009	UGA workers Employed and Living in Selection Area	18	http://lehdmap.did.census.gov/ (inflow/outflow analysis)
30	2009	Employed in the Selection Area but Living Outside	590	http://lehdmap.did.census.gov/ (inflow/outflow analysis)
31	2009	Share of Workers commuting to UGA from Outside	0.9703947	Divided 590 Commuting Workers by 608 Total Workers

IV. SALES AND TAX REVENUE

Clallam County				
Statistic #	Year	Item	Value	Source
32	2006	Clallam County Sales and Use Tax/Interest:	5,722,837	http://ofm.wa.gov/databook/county/clal.pdf
33	2007	Clallam County Sales and Use Tax/Interest:	5,722,907	http://ofm.wa.gov/databook/county/clal.pdf
34	2008	Clallam County Sales and Use Tax/Interest:	5,755,063	http://ofm.wa.gov/databook/county/clal.pdf
35	2009	Clallam County Sales and Use Tax/Interest:	5,024,872	http://ofm.wa.gov/databook/county/clal.pdf
36	2009	Clallam County Sales and Use Tax Distribution	9,304,692	http://www.clallam.org/info/documents/Profile2009Complete.pdf
37	2008		\$10,417,978	
38	2009	Unincorporated Sales and Use Tax Distribution	\$3,953,656	http://www.clallam.org/info/documents/Profile2009Complete.pdf

Carlsborg UGA				
Statistic #	Year	Item	Value	Source
39	2000	Tax Paid to State (6.5%)	\$ 2,771,722	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
40	2005	Tax Paid to State (6.5%)	\$ 13,133,263	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
41	2006	Tax Paid to State (6.5%)	\$ 15,263,002	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
42	2007	Tax Paid to State (6.5%)	\$ 15,277,080	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
43	2008	Tax Paid to State (6.5%)	\$ 12,930,563	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
44	2009	Tax Paid to State (6.5%)	\$ 10,637,370	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
45	2010	Tax Paid to State (6.5%)	\$ 10,565,224	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
46	2000	Tax Paid to County (1.9%)	\$ 194,422.00	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
47	2005	Tax Paid to County (1.9%)	\$ 351,025.00	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
48	2006	Tax Paid to County (1.9%)	\$ 317,916.00	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
49	2007	Tax Paid to County (1.9%)	\$ 387,911.00	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
50	2008	Tax Paid to County (1.9%)	\$ 308,371.00	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
51	2009	Tax Paid to County (1.9%)	\$ 312,068.00	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
52	2010	Tax Paid to County (1.9%)	\$ 313,828.00	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
53	2000	Gross Sales	\$ 149,215,942	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
54	2005	Gross Sales	\$ 383,502,035	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
55	2006	Gross Sales	\$ 429,684,856	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
56	2007	Gross Sales	\$ 426,460,919	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
57	2008	Gross Sales	\$ 398,742,307	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
58	2009	Gross Sales	\$ 308,159,010	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
59	2010	Gross Sales	\$ 313,354,814	Labor Market & Economic Analysis, ESD Sales Analysis Spreadsheet
60	2000-2010	Total Carlsborg Taxes to County Growth	0.614158891	Used Growth Formula. Variables from Statistics #52 and 46
61	2000-2010	Annual Carlsborg Taxes to County Growth Rate	0.049046232	Used FV equation. Data from Statistics #56 and 46
62	2006-2010	Sales Tax Paid to Clallam and WA	66313333	The Sum of Statistics #41:#45 and Statistics #48:#52
63	2009	Share of Unincorporated County Tax Revenue	0.0789315	Divided Statistic #51 by Statistic #38
64	2000-2010	Gross Sales Growth	1.10008952	Used Growth Formula. Data from Statistics #53 and #59
65	2006-2010	Gross Sales Generated over last 5 years	\$1,876,401,906	Added the Gross Sales from 2006 to 2010.
66	2006-2010	Gross Sales Generated over last 5 years (2010 Dollars)	1943849845	Adjusted the above total using 2006 -2010 CPI numbers.
67	2006-2010	Sales Tax Generated over last 5 years	\$ 66,313,333	Sum of Taxes Paid to County and to State from 2006-2010
68	2000-2010	Contribution to County Tax Growth	0.614158891	Used Growth Formula. Data from Statistic #56 and #50

V. WAGE AND SALARY DISBURSEMENTS

Clallam County				
Statistic #	Year	Item	Value	Source
69	2008	Total Annual Wages	\$725,695,920	http://www.clallam.org/info/documents/Profile2009Complete.pdf
70	2008	Clallam Average Wage	\$25,889.97	Divided Statistic #69 by Statistic #12

Carlsborg UGA				
Statistic #	Year	Item	Value	Source
71	1998	Estimated Annualized Wages in UGA	\$11,389,792	Labor Market & Economic Analysis, ESD Wage Analysis Spreadsheet
72	2002	Estimated Annualized Wages in UGA	\$15,010,660	Labor Market & Economic Analysis, ESD Wage Analysis Spreadsheet
73	2005	Estimated Annualized Wages in UGA	\$18,611,636	Labor Market & Economic Analysis, ESD Wage Analysis Spreadsheet
74	2008	Estimated Annualized Wages in UGA	\$17,414,136	Labor Market & Economic Analysis, ESD Wage Analysis Spreadsheet
75	2009	Estimated Annualized Wages in UGA	\$16,938,552	Labor Market & Economic Analysis, ESD Wage Analysis Spreadsheet
76	2010	Estimated Annualized Wages in UGA	\$16,764,884	Labor Market & Economic Analysis, ESD Wage Analysis Spreadsheet
77	2008	Carlsborg Average Wage	\$28,641.67	Divided C19 by 2008 Carlsborg Employees (608)
78	2008	Carlsborg/Clallam Wage Percent Difference	0.106284403	Used Growth formula with Statistics #77 and #70

VI. NAICS SECTOR CONCENTRATION AND EMPLOYMENT

Clallam County				
Statistic #	Year	Item	Value	Source
79	2008	Manufacturing Firms	79	http://www.clallam.org/info/documents/Profile2009Complete.pdf
80	2008	Manufacturing Average Employment	1394	http://www.clallam.org/info/documents/Profile2009Complete.pdf
81	2009	Manufacturing Average Employment	1538	http://ehdmap.did.census.gov/
82	2008	Retail Average Employment	3475	http://www.clallam.org/info/documents/Profile2009Complete.pdf
83	2009	Retail Average Employment	2424	http://ehdmap.did.census.gov/
84	2009	Clallam Manufacturing Employment as a Share of Total Clallam Employment	0.075936	Divided # Clallam Mfg. Employees by #Total Clallam Employees
85	2009	Clallam Construction Employment	879	http://ehdmap.did.census.gov/

Carlsborg UGA				
Statistic #	Year	Item	Value	Source
86	2009	Manufacturing Average Employment	112	http://ehdmap.did.census.gov/
87	2009	Manufacturing Employment as a Share of Total Carlsborg Employment	0.184211	Divided 112 Manufacturing Jobs by 608 Total Jobs
88	2009	Carlsborg Mfg Employment as a Share of County Mfg Employment	0.072822	Divided 112 Manufacturing Jobs by 1538 County Manufacturing Jobs
89	2009	Retail Average Employment	170	http://ehdmap.did.census.gov/
90	2009	Carlsborg Retail Employment as a Share of County Retail Employment	0.070132	Divided 170 Retail jobs by 2424 Retail Jobs
91	2009	% difference between Carlsborg Mfg % and Clallam Manufacturing %	1.425878	(.1842 Carlsborg Share - .0759 Clallam Share)/.0759 Clallam Share.
92	2009	Carlsborg Construction Employment	88	http://ehdmap.did.census.gov/
93	2009	Construction Employment as a % of Total Clallam Construction Employment	0.100114	Divided 88 UGA Construction jobs by 879 County Construction jobs

VII. POPULATION AND EMPLOYMENT TRENDS

Clallam County					
Statistic #	Year	Item	Value	Source	
94	2002	Clallam Employment	18923	http://lehdmap.did.census.gov/	
95	2003	Clallam Employment	18820	http://lehdmap.did.census.gov/	
96	2004	Clallam Employment	19603	http://lehdmap.did.census.gov/	
97	2005	Clallam Employment	20054	http://lehdmap.did.census.gov/	
98	2006	Clallam Employment	20727	http://lehdmap.did.census.gov/	
99	2007	Clallam Employment	21030	http://lehdmap.did.census.gov/	
100	2008	Clallam Employment	20362	http://lehdmap.did.census.gov/	
101	2009	Clallam Employment	20254	http://lehdmap.did.census.gov/	
102	2009	Clallam Population	68,068	http://factfinder.census.gov/	
103	2000	Clallam Population	64,525	http://factfinder.census.gov/	
104	2002-2009	Annual Employment Growth Rate	0.0097579	Used FV equation to find r. Used data from Statistics #94 and #101	
105	2002-2009	Employment Growth	0.0703377	Took Growth % using data from Statistics #94 and #101	
106	2000-2009	Population Growth	0.054909	(68069 in 2009 - 64525 in 2000) / 64525 in 2000	
107	2000-2009	Annual Population Growth Rate	0.0059571	Used FV equation to find r. Used data from Statistics #102 and #103	

Carlsborg UGA					
Statistic #	Year	Item	Value	Source	
108	2000	Unemployment rate	6.9	http://www.city-data.com/city/Carlsborg-Washington.html	
109	2001	Unemployment rate	7.8	http://www.city-data.com/city/Carlsborg-Washington.html	
110	2002	Unemployment rate	8.6	http://www.city-data.com/city/Carlsborg-Washington.html	
111	2003	Unemployment rate	8.6	http://www.city-data.com/city/Carlsborg-Washington.html	
112	2004	Unemployment rate	7.1	http://www.city-data.com/city/Carlsborg-Washington.html	
113	2005	Unemployment rate	6.5	http://www.city-data.com/city/Carlsborg-Washington.html	
114	2006	Unemployment rate	5.8	http://www.city-data.com/city/Carlsborg-Washington.html	
115	2007	Unemployment rate	5.8	http://www.city-data.com/city/Carlsborg-Washington.html	
116	2008	Unemployment rate	7.1	http://www.city-data.com/city/Carlsborg-Washington.html	
117	2009	Unemployment rate	9.9	http://www.city-data.com/city/Carlsborg-Washington.html	
118	2010	Unemployment rate	10.4	http://www.city-data.com/city/Carlsborg-Washington.html	
119	2011 (Estimated)	Unemployment rate	11.6	http://www.city-data.com/city/Carlsborg-Washington.html	
120	2002	Carlsborg Employed	472	http://lehdmap.did.census.gov/	
121	2003	Carlsborg Employed	467	http://lehdmap.did.census.gov/	
122	2004	Carlsborg Employed	599	http://lehdmap.did.census.gov/	
123	2005	Carlsborg Employed	620	http://lehdmap.did.census.gov/	
124	2006	Carlsborg Employed	604	http://lehdmap.did.census.gov/	
125	2007	Carlsborg Employed	614	http://lehdmap.did.census.gov/	
126	2008	Carlsborg Employed	605	http://lehdmap.did.census.gov/	
127	2009	Carlsborg Employed	608	http://lehdmap.did.census.gov/	
128	1990	Carlsborg Population	602	Final Draft Sewer Facilities Plan Volume 2	
129	2000	Carlsborg Population	855	http://factfinder.census.gov/	
130	2006	Carlsborg Population	828	Interpolated	
131	2007	Carlsborg Population	934	Interpolated	
132	2009	Carlsborg Population	1147	http://factfinder.census.gov/	
133	2009	Primary Employment	566	http://lehdmap.did.census.gov/	
134	1990-2009	Annual Population Growth Rate	0.034511	Used FV equation. Variables from Statistics #134 and #138	
135	1990-2009	Population Growth	0.9053156	Took growth % using data from statistics #134 and #138	

136	2002-2009	Employment Growth	0.2881356	Took growth percentage using data from lehdmap.did.census.gov
137	2002-2009	Annual Employment Growth Rate	0.036833	Used FV equation used data from statistics #127 and #120
138	2009	Carlsborg Population as a Share of County Populace	0.0168508	Divided 1147 Carlsborg Residents by 68068 Clallam Residents.
139	2009	Carlsborg Employment as a Share of County Employment	0.0300188	Divided 608 Carlsborg Employees by 20254 Clallam Employees
140	2009	Percentage of Primary Jobs In Carlsborg	0.9309211	Divided 566 Primary Jobs in Carlsborg by 608 Total Jobs in Carlsborg
141	2000-2009	Population Growth	0.3415205	Took growth % using data from statistics #132 and #129
142	2000-2009	Annual Population Growth Rate	0.0331835	Used FV equation, variable data from Statistics #132 and #129

Attachment B

UGA Businesses

Business	Type of Business	Mailing Address
A. M. Systems, Inc.	medical supplies	PO Box 850
All About Storage	storage	PO Box 1838
AllForm Welding	welding shop	PO Box 175
Anjo Soils	soils & bark	PO Box 278
Aspire Academy of Expressive Arts	dance & music lessons	160 Harrison Rd
Batson Enterprises		130 Harrison Rd #8
Big 5 Sporting Goods	retail sporting goods	PO Box 92088
Bimbo Bakeries Inc		
Bliemeisters Wood Work		172 Valley Center Place
Bondeson Building Design	home design	PO Box 754
Bronco Electric Inc		13 Ruths Place D
Burfitt Construction Inc	general contractor	PO Box 773
C & J Excavating	land clearing	PO Box 430
Cabinets By Design Center	cabinetry plus	239 Taylor Ct
Canal Pumps Inc	wellll pumps	PO Box 657
Carlsborg Chiropractic Center	chiropractor	PO Box 983
Carlsborg Condo Storage		
Carlsborg Investigation Service Inc	PI agency	PO Box 223
Carlsborg Mini Storage	storage	PO Box 281
Carlsborg Physical Therapy		PO Box 572
Carlsborg Station Inc	gas station/mini mart	20 Carlsborg Rd
Carlsborg Whistle Stop Barber Shop	salon & barber	190 Village lane
Cays Productions, Recording Studio		PO Box 1172
Chevron	gas station	
Cornerstone Builders	custom home bldrs	PO Box 1633
Country Care Vet & Acupuncture	Veterinarian	51 Valley Center Place
Dan Forshaw Construction	custom home bldrs	210 Center Parkway
Doug Parrish Excavating	construction	PO Box 1447
Dragons Lair Ceramics	ceramic, art supplies	PO Box 418
Eastern Hills Community Church	church	PO Box 1355
Eastern WA Hay	feed dealer	261861 Hwy 101
Elixair Medical		13 Ruths Place E
Epoch Salon	beautyi salon	865 Carlsborg Rd, Suite A
E-Star Northwest LLC		PO Box 2452

Business	Type of Business	Mailing Address
European autowerks	auto repair	
Evergreen Building Products	construction equip supplies	301 Business Park Loop
Ferguson Enterprises Inc	plumbing supplies	2121 N Columbia Blvd
Finishing Touches	gifts & floral	PO Box 563
Fishermans Outlet (Utmost Enterprises)	fishing rod parts	31 Charles Way
Flippers Restaurant	restaurant	261491 Hwy 101
Furniture Medic		PO Box 3937
Gabby's Java	coffee	PO Box 441
George Braly Accountant	accountant	803 Carlsborg Rd #A / PO Box 908
Goin to the Dogs	grooming	53 Valley Center Place
Hair Trix	hair salon	21 Valley Center Place
High Energy Metals	metal fabricators	293 Business Park Loop
Hospice of Clallam County	hospice	151 Ruths Place 1A
Hot Shots Espresso	espresso stand	11 Valley Center Place
Hygiene for Health	plumbing supplies	71 Ruths Place #8
Jamestown S'Klallam EDA		257 Business Park Loop
JoJaco Properties		PO Box 757
La Paw Spa	canine water therapy	261043 Hwy 101
Linde Family Funeral	funeral establishment	435 W Bell St, C-2
Lobo Design	web/graphic design	PO Box 1974
Mad Dash (Kathleen Wheeler)		PO Box 3384
Mervin Mfg	sports boards	65 Banana Way
Monroe House Moving Inc		PO box 1686
Mudslayer Mfg LLC	mud systems/wells	PO Box 1163
Northwest Horticulture Supply	hydroponics store	161 Hooker Rd # 1
Old Mill Café	restaurant	721 Carlsborg Rd
Olympic Arma Coating	automotive	61 Hooker Rd
Olympic Springs	bottled water	PO Box 880
Pacific Bay International Inc	fishing rod parts	PO Box 177
Paisleys Boutique		20 Mill Rd
Pap-E Machinery	construction equipment	84 Ruth's Place
Parkwood Mobile Home Community	mobile home park	261520 Hwy 101
Parrish Trucking Inc	trucking company	PO Box 910
Paul M Creech Pianos & Music		151 Ruths Place 4
Peninsula RV	RV sales, service	PO Box 3984
Peninsula Screen		220 Carlsborg Rd
Peninsula Shower Door & Mirror		63 Hooker Rd
Performance Systems Integration Corp		7324 SW Durham Rd
Pettit Oil	distributor oil	820 Myrtle St
Pipe-Rite Plumbing Inc		160 Carlsborg Rd

Business	Type of Business	Mailing Address
Primo Construction	construction co	970 Carlsborg Rd
PUD	Utility	PO Box 1090
Quality Plus Roofing	roofers	PO Box 610
Rainbows End RV	RV park	123 Forest Ridge Dr
Red Carpet Car Wash	car wash	72 Bonneville Lane
Richerts Marble & Granite		102 Wilders Lane
Robert Brock		
Roji Home & Garden	garden supplies	2715 Lost Mountain Td
Savvy Inc	trophies & engraving	160 Harrison Rd
Schwans Sales Enterprises		115 N College Dr
Sears Hometown Store	retail	PO Box 624
Sequim Valley Center Mini Storage	mini storage	PO Box 757
Sequim Valley Pumps		178 Carlsborg Rd
Sequim Village Glass	glass sales/service	761 Carlsborg Rd
Service Master	cleaning service	PO Box 69
Soils Applications, LLC	analysis & septic systems	PO Box 1120
Starlite Security		
Steve's Repair		261370 Hwy 101
Stone Creek Statuary	statuary, garden	261533 Hwy 101
Sunny Farms Store	country store	PO Box 125
TEF nET		PO Box 598
Texaco Food Mart Hardy's 2	gas and food	33 Taylor Cutoff Rd
The Old PO Sweets and Gifts	gifts, ice cream, sweets	PO Box 914
The Wood Butcher		315 Carlsborg Industrial Pk
Thor's Automotive Repair	auto repair	81 Hooker Rd # 1
Thrivent Financial	insurance	PO Box 99
Tracy's Insulation	insulation	PO Box 567
Tre' Jolie Salon		64 Village Lane
U Build It	home blrs consulting	261641 Hwy 101
U Save Real Estate	real estate	261043 Hwy 101 #B
Van Aller Surveying	land surveying	PO Box 757
Waynora's Hair Care	beauty supplies	863 Carlsborg Rd, B

Attachment C: UGA Boundaries

Source: Clallam County Parcel and Critical Areas Map

