Attachment B
Exhibit A



Economic Development Element

Part 1 – Goals, Policies, and Implementation Actions

City of Tumwater 2025 Comprehensive Plan

Balancing Nature and Community: Tumwater's Path to Sustainable Growth

Draft Version October 6, 2026
Amended December 2026
Ordinance No. 02026-XXX

CITY OF TUMWATER



Contents

Chapter 1. Introduction 4

A. Background 5
B. How to Read this Element 7
C. Tumwater's Economy Today 8

Chapter 2. Regulatory Guidelines 11

A. Growth Management Act – Element Goals 12
B. County-Wide Planning Policies 13

Chapter 3. Element Goals and Policies 15

A. How to Read These Tables 18
B. Economic Development Goals 19
Goal ED-1 19
Goal ED-2 23
Goal ED-3 27
Goal ED-4 31
Goal ED-5 35
Goal ED-6 39
Goal ED-7 43
Goal ED-8 47
Goal ED-9 51

Appendix A. Draft Implementation Actions 59

Abbreviations Used in Document

CDD	Community Development Department
EXD	Executive Department
PRD	Parks, Recreation, and Facilities Department
RCW	Revised Code of Washington
TED	Transportation & Engineering Department
WRS	Water Resources & Sustainability Department

Chapter 1. Introduction

Background

This **Economic Development Element** (Element) is part of Tumwater's Comprehensive Plan and was created to meet the state Growth Management Act (Chapter 36.70A RCW) requirement to "*establish local goals, policies, objectives, and provisions for economic growth and vitality and a high quality of life*" in Tumwater. The Vision, Mission, and Beliefs that provide overarching direction for the future of Tumwater are found in the Comprehensive Plan Introduction. This Element aligns with and is consistent with the other elements of the Comprehensive Plan, which address the range of issues communities must plan for, including housing, climate, land use, transportation, and more. This Element contains two parts.

Part 1 – Goals, Policies, and Implementation Actions establishes Tumwater's goals and policies to set forth a direction for economic development in the city. The goals of this Element are guided by the state Growth Management Act and the Thurston County County-Wide Planning Policies, as well as the vision of a Tumwater that will be:

people-oriented and highly livable, with a strong economy, dynamic places, vibrant neighborhoods, a healthy natural environment, diverse and engaged residents, and a living connection to its history.

This Element's goals and policies are coordinated with the other elements in the Comprehensive Plan and regional plans. This Element's goals and policies provide the policy basis for draft implementation actions and future actions that will be developed over the next 20 years, which will be the foundation for Tumwater's annual work programs to address economic development for the community.

Part 2 – Technical Information provides the technical analysis of economic conditions in Tumwater. This section includes analysis of demographics, housing, income, consumer demand, workforce, industries, land needs, strengths, weaknesses, opportunities, and threats.



Economic Development is a critical component for the sustainability of Tumwater's civic operations. Without consistent revenue growth, Tumwater would not be able to fund the public services residents require. Beyond revenue generation for the City, a well-functioning economic development policy enables residents an opportunity to pursue living-wage opportunities to provide for themselves and their families, and the opportunity to explore a wide variety of professional interests without relocating from their established community.

How to Read this Element

Regulatory Guidelines 11

In **Part 1**, **Chapters 2** discusses this Element's connection to the goals of the state Growth Management Act and the Thurston County County-Wide Planning Policies.

Element Goals and Policies 14

Chapter 3 presents each goal with an explanation of how to read the tables and then presents each of Tumwater's economic development goals in detail with an explanation of the importance of each goal.

Draft Implementation Actions 59

Appendix A contains the draft implementation actions, which are intended to be a source of annual work program items that serve to implement the goals and policies of this Element. The annual work programs will further refine implementation actions before they are put into practice. Implementation actions will be further amended, added, or subtracted as needed over the course of the 20-year Comprehensive Plan as new opportunities arise to meet the intent of this Element's goals and policies.

Tumwater's Economy Today

Tumwater is a city with considerable strengths, including rapid population and job growth, high household purchasing power, and a well-educated workforce. However, these benefits are unevenly distributed and bring their own set of risks. This analysis identifies three main themes:

- the need to balance the stability offered by a strong public sector employment base with the risk of overdependence;
- the importance of connecting housing growth, household spending, and business district vitality;
- and the challenge of shifting workforce dynamics, with most future job openings resulting from workforce replacement rather than new job creation.

Economic diversification depends on a workforce that can afford to live in Tumwater, while revitalizing business districts relies on both housing growth and improving key sites. Additionally, workforce development is linked to the success of diversification efforts. Addressing these challenges will require a coordinated strategy that integrates economic diversification, housing development, and workforce planning, rather than treating them as isolated initiatives.

From Part 2, SWOT Analysis: Conclusion.

26,956
residents, 2020–24 estimate

25,653
jobs located in Tumwater, 2026Q1

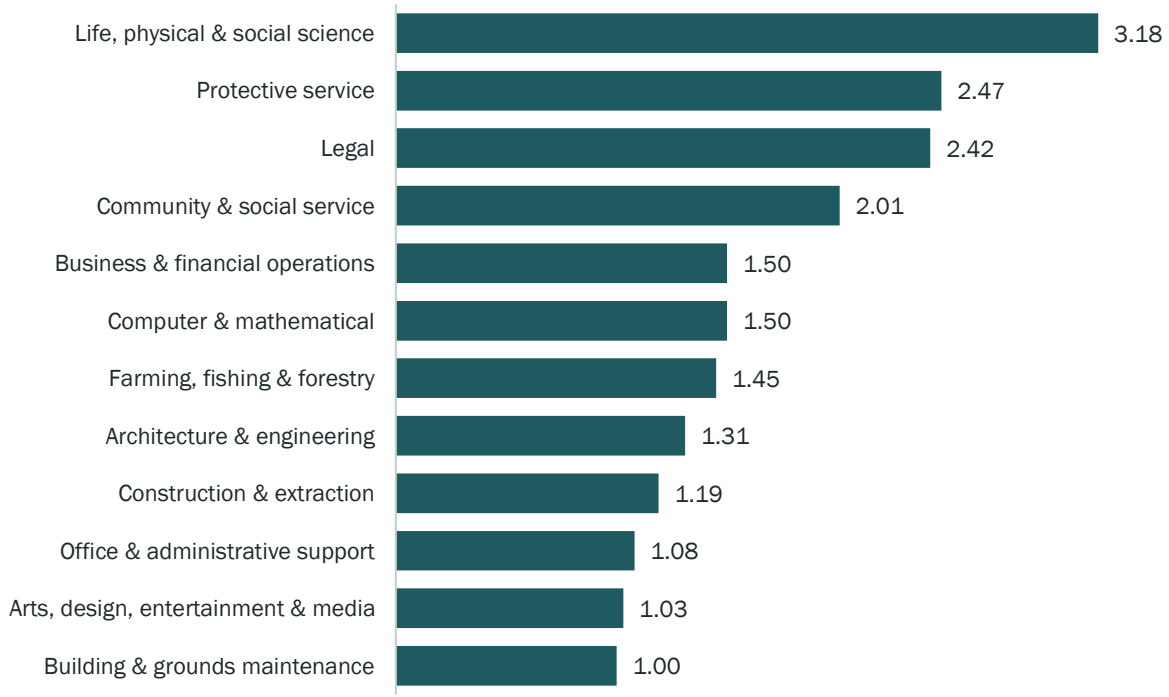
$77,127
average annual wage, 2026Q1

3.8%
average annual job growth, 2021Q1–2026Q1

32.5%
of jobs in Public Administration

45.5%
of residents 25 to 64 hold a bachelor's degree or higher

Occupation Groups at or Above the National Concentration in Tumwater, 2026Q1 (location quotient)



Source: JobsEQ® Occupation Snapshot, Tumwater city, WA, 2026Q1; exported July 28, 2026. A location quotient of 1.00 equals the national concentration. Detail in Part 2, Figure ED-14.



Chapter 2. Regulatory Guidelines

Growth Management Act – Element Goals

Chapter 36.70A RCW requires Tumwater show how this Element meets the relevant planning goals contained within the Act. The fifteen goals guide the development and adoption of Tumwater's Comprehensive Plan and development regulations.

The following is a summary of how this Element addresses the relevant goal:

> *"Encourage economic development throughout the state that is consistent with adopted comprehensive plans, promote economic opportunity for all citizens of this state, especially for unemployed and for disadvantaged persons, promote the retention and expansion of existing businesses and recruitment of new businesses, recognize regional differences impacting economic development opportunities, and encourage growth in areas experiencing insufficient economic growth, all within the capacities of the state's natural resources, public services, and public facilities."*
>
> *Source: RCW 36.70A.020(5)*

This Element addresses this goal by establishing goals, policies, and implementation actions that support the retention and expansion of Tumwater's existing businesses, the recruitment of new businesses that fill supply-chain and service gaps, and the diversification of an employment base anchored by state government. This Element promotes economic opportunities for all residents through policies that expand access to housing, childcare, education, training, and living-wage employment. It directs economic growth to locations where land, infrastructure, and public services can support it, consistent with the capacities of Tumwater's natural resources, public services, and public facilities.

County-Wide Planning Policies

The Growth Management Act requires that Tumwater's Comprehensive Plan be consistent with the Thurston County County-Wide Planning Policies, which were last amended in 2025. The following is a list of the County-Wide Planning Policy areas that apply to this Element, and a brief description of how this Element is consistent with these policies. All County-Wide Planning Policies are adopted as part of the Comprehensive Plan and are found in Appendix A of the plan introduction.

General Policies

This Element contains goals, policies, and implementation actions that address the wide range of issues covered by County-Wide Planning Policies 1.1, 1.5, 1.8, 1.9, 1.13-1.15, and 1.17.

These policies establish the region's shared framework for growth. This Element supports that framework by directing employment growth to locations that can be served with urban infrastructure, coordinating economic development with Thurston County, neighboring jurisdictions, and regional partners, and advancing housing, equity, and environmental objectives alongside economic ones.

Promotion of Contiguous and Orderly Development, Provision of Urban Services, and Protection of Rural Areas

This Element contains goals (what we want to achieve), policies (how we are going to get there), and implementation actions (what we need to do next), that promote maximizing the use of existing infrastructure and assets as covered by County-Wide Planning Policy 3.2.a.

This Element implements this policy by prioritizing redevelopment and intensification of sites already served by urban infrastructure, including the former Brewery Complex and Tumwater's established planning subareas, and by coordinating economic development with the City's capital facilities, transportation, and utility planning.

Economic Development and Employment

This Element contains direction, standards, and tasks that address the wide range of issues covered by County-Wide Planning Policies 7.1-7.5.

This Element carries them out through goals and policies for business retention and expansion, targeted recruitment, workforce development aligned with employer needs, and diversification of the local economy with a focus on export-based industries and opportunities in health care. These efforts are conducted broadly in partnership with organizations and jurisdictions like the Port of Olympia, Thurston County, the Tumwater Area Chamber of Commerce, the Thurston Economic Development Council, and the Thurston County Chamber of Commerce. This Element includes the land analysis conducted by The Thurston Regional Planning Council in 2021, including updates in 2025.

Chapter 3. Element Goals & Policies

Economic Development Goals

ED-1	Establish a predictable, responsive, and investment-ready development climate that stimulates economic activity and private investment.
ED-2	Support the retention and growth of Tumwater's existing businesses and entrepreneurs.
ED-3	Grow and diversify Tumwater's exports, with a focus on manufacturing.
ED-4	Target recruitment efforts to support existing businesses and supply-chain gaps.
ED-5	Redevelop the former Brewery sites to their highest available use.
ED-6	Partner with the Port of Olympia to advance economic development opportunities.
ED-7	Conduct business outreach to better connect local economic participants and the City.
ED-8	Strengthen Tumwater's community and district vibrancy to advance the community as a regional destination through placemaking.
ED-9	Develop an affordability strategy that secures equitable access to Tumwater's future growth for all people by expanding the supply of housing, childcare, education, and energy options.


BREW HOUSE

How to Read These Tables

This Element's goals and policies are not in priority order. Appendix A provides a list of the draft implementation actions by goal and policy that will be considered when developing annual work programs for implementing this Element's goals and policies.

Period

Each of this Element's policies are associated with estimated start dates, length of time to complete, and target completion dates, if appropriate, based on adequate funding for staff and resources. Most policies are ongoing with no set target completion date.

Department Leads

Implementation of this Element's policies are associated with several Tumwater departments:

CDD	Community Development
EXD	Executive Department
PRD	Parks, Recreation, and Facilities
TED	Transportation & Engineering
WRS	Water Resources & Sustainability

Goal ED-1

Establish a predictable, responsive, and investment-ready development climate that stimulates economic activity and private investment.

Goal ED-1 is intended to make Tumwater a place where businesses, developers, and property owners can invest with confidence.

Why is this goal important?

Private investment follows predictability. When development review timelines, regulations, and Tumwater's priorities are clear and established, businesses can make location and expansion decisions with confidence, and the cost and risk of investing in Tumwater go down. When priorities are unclear or change unexpectedly, capital will often go to places that have a reputation for being more stable.

Tumwater competes for private investment within a regional market that includes local markets such as Lacey, Olympia, Yelm, and unincorporated Thurston County but also markets in neighboring counties. Many of the factors that drive location decisions, such as market size and labor costs, are beyond the city's control. However, the quality and reputation of the development climate is a competitive factor that Tumwater controls directly.



Goal ED-1 Policies

Policies	Lead
ED-1.1 Maintain regular two-way communication with businesses, residents, development applicants, and economic development partners to align City priorities, regulations, and service delivery with community and market needs.	EXD, CDD
ED-1.2 Make development review predictable, timely, and easy to understand for businesses, developers, and property owners while maintaining adopted community standards.	CDD, EXD
ED-1.3 Promote Tumwater as a competitive location for private investment by clearly communicating its market position, development opportunities, and priority investment areas.	EXD

What the data shows

Tumwater is growing faster than the region.

3.8%

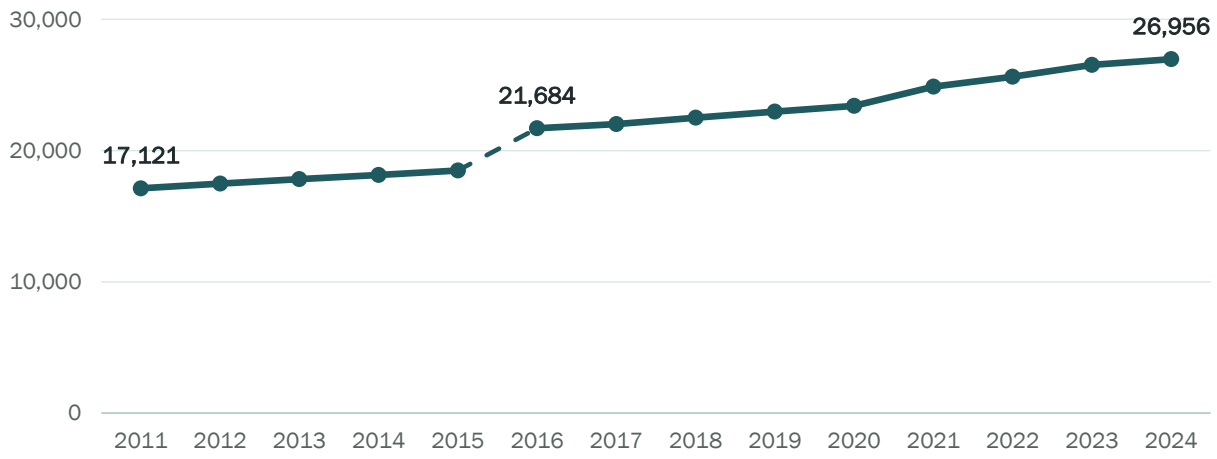
average annual employment growth in Tumwater, 2021Q1–2026Q1, compared with 3.0 percent in Thurston County and 2.3 percent statewide.

Tumwater has grown faster than regional and statewide averages on both the resident and employment sides. The population rose from 17,121 in the 2007–2011 American Community Survey period to 26,956 in the 2020–2024 period, an increase of 57.4 percent. Part of that increase reflects annexation, but with boundaries essentially stable since 2016, population has still grown an average of 2.8 percent per year.

Growth of this kind expands both the labor pool available to employers and the customer base available to local businesses and generates the level of consumer demand that makes district redevelopment feasible.

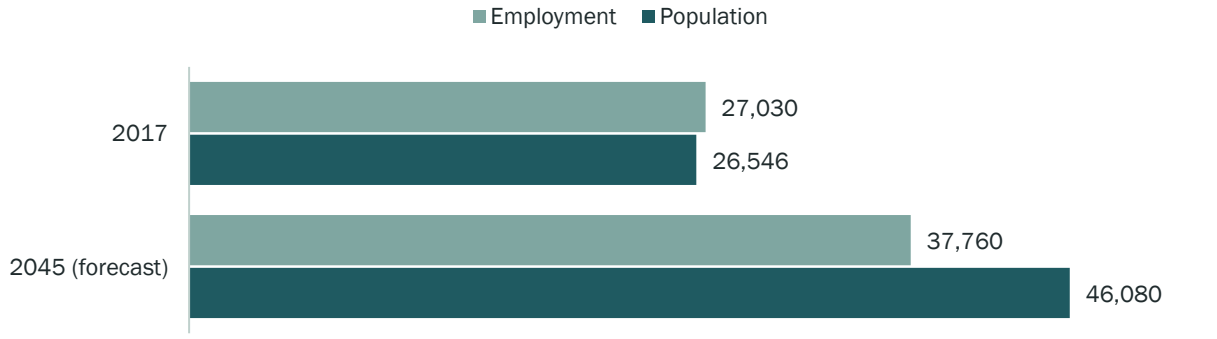
From Part 2, SWOT Analysis: Sustained Population and Employment Growth. Employment: JobsEQ® Industry Snapshot, 2026Q1. Population: American Community Survey 5-Year Estimates via JobsEQ®.

Tumwater Population, 2011-24



Source: JobsEQ®, U.S. Census American Community Survey 5-Year Estimates ending in the year shown; exported July 28, 2026. The dashed segment marks the 2016 annexation. Detail in Part 2, Figure ED-1.

Population & Employment in Tumwater and Its Urban Growth Area, 2017 and 2045



Sources: Thurston Regional Planning Council, Employment Estimates and Forecast by Jurisdiction and Sector, Table 7, December 19, 2019; and Population Estimates and Forecast by Jurisdiction, Table 3, forecast adopted 2018. By 2045 the area is forecast to have 8,320 more residents than jobs. Detail in Part 2, Figure ED-2.

Goal ED-2

Support the retention and growth of Tumwater's existing businesses and entrepreneurs.

Goal ED-2 is intended to help existing businesses and entrepreneurs be healthy and grow in Tumwater.

Why is this goal important?

Most job growth in a community comes from businesses that are already there, not from those recruited from somewhere else. Retention and expansion are the most reliable and cost-effective form of economic development and losing an established employer can be far more damaging to a local economy than missing a recruitment prospect.

The technical analysis in Part 2 shows that Tumwater's private economy is built on established strengths in the sectors of *Wholesale Trade* and *Professional and Technical Services* alongside a large base of small businesses and self-employed residents. Helping these businesses stay healthy and grow protects the City's employment and tax base and builds the supplier relationships and workforce depth that attract complementary businesses.



Goal ED-2 Policies

Policies	Lead
ED-2.1 Maintain a proactive business retention and expansion program focused on existing employers through partner organizations.	EXD
ED-2.2 Strengthen key industry clusters by supporting existing businesses and attracting complementary businesses.	EXD
ED-2.3 Support small businesses and entrepreneurs through accessible City processes, partnerships, and targeted programs.	EXD, CDD
ED-2.4 Align workforce and education partnerships with the needs of Tumwater businesses.	EXD

What the data shows

Most future job openings will replace workers rather than add new ones.

94.8%

of projected labor demand across Tumwater industries over the next five years is replacement of workers who leave the labor force or change occupations.

Tumwater's workforce challenge over the planning period is therefore less about job growth and more about talent pool development, retention, and succession planning.

Future job openings will continue to result from replacing retiring or departing workers, instead of new job growth. At the same time, the groups entering the workforce are getting smaller, while those leaving are increasing. This trend creates greater challenges for employers, especially those with owner-operated businesses, to find successors and maintain operations.

The most effective strategies are those that keep workers in existing occupations, move them along career pathways, and connect young residents to their first employment opportunities.

From Part 2, Industry chapter (Forecast & Demand Structure) and SWOT Analysis. JobsEQ® Industry Snapshot, Tumwater city, WA, 2026Q1.

Five-Year Projected Job Openings by Source in Tumwater, 2026 Q1



Source: JobsEQ® Industry Snapshot, Tumwater city, WA, 2026Q1; exported July 28, 2026. Of 14,647 projected openings, 768 (5.2 percent) represent net employment growth. Components may not sum to the total due to rounding.

An Established Goods-Movement Economy

Jobs	Avg. ann. wage	Location quotient	5-yr ann. %	Forecast ann. %
1,290	$106,354	1.37	6.4%	0.7%

The *Wholesale Trade* sector added 344 jobs over the past five years, while employment statewide remained essentially flat. Tumwater's location along Interstate 5 between the Seattle and Portland markets supports its role in wholesale trade and goods movement.

Source: JobsEQ® Industry Snapshot, Tumwater city, WA, 2026Q1; exported July 28, 2026.

Goal ED-3

Grow and diversify Tumwater's exports, with a focus on manufacturing.

Goal ED-3 is intended to increase local prosperity through exports by helping to expand the share of Tumwater's economy that sells goods and services to customers outside the region.

Why is this goal important?

Businesses that sell goods and services to customers outside the region bring new dollars into Tumwater's economy while local-serving businesses largely re-circulate dollars that are already here. Growing this part of the economy is how a community increases the size of its economy and generates wealth in its community.

Tumwater's employment base is anchored by local and state government. Public administration accounts for 1 in 3 jobs in the City with a concentration nearly seven times the national average[1]. That anchor provides stability, but it also concentrates risk in public sector budget cycles. Export-based industry diversification is therefore an important risk mitigation for the City.

Export industries like industrial and light manufacturing businesses offer living wages across a range of skill levels while importing wealth into the community.[2]

[1] See Part 2 Chapter 6C Public Administration Anchor and Table ED-16
[2] Average Manufacturing sector wage in Tumwater is $74,294. See Part 2 Table ED-16

Goal ED-3 Policies

Policies	Lead
ED-3.1 Protect and strategically utilize light industrial zoned lands to support sustainable long-term economic growth.	CDD, EXD
ED-3.2 Identify and support priority sectors that align with Tumwater's assets, workforce, land base, and diversification goals.	EXD
ED-3.3 Position Tumwater to participate in and benefit from clean energy, green business, and sustainable industry growth.	EXD, WRS
ED-3.4 Support and connect workforce development and education partners to promote the needs of Tumwater's target industries and employers.	EXD
ED-3.5 Leverage Tumwater's government employment base to grow complementary private sector industries and reduce long-term dependence on public sector employment.	EXD

What the data shows

More than half of Tumwater's recent job growth came from a single sector.

56%

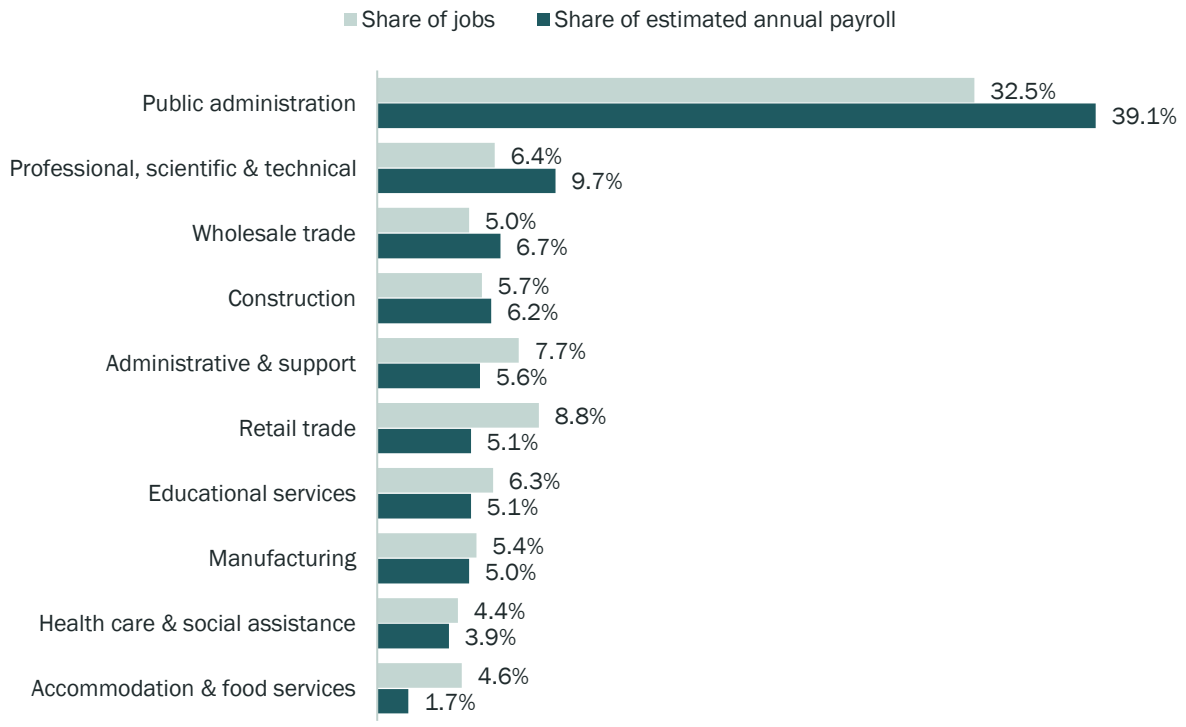
of the 4,332 net jobs Tumwater added from 2021 to 2026 were in Public Administration, a sector forecast to grow about 0.5 percent per year.

Public Administration accounts for 8,334 jobs or 32.5 percent of all employment in Tumwater, roughly seven times the national concentration. Of the sector's 4,005 projected openings over the next five years, only 192 represent new net positions.

A local economy in which roughly one third of total jobs depend on the budget decisions, leasing practices, and staffing policies of a single institutional employer has limited capacity to absorb a contraction within that employer. This is the central structural argument for economic diversification.

From Part 2, Industry chapter (Public Administration Anchor) and SWOT Analysis. JobsEQ® Industry Snapshot, Tumwater city, WA, 2026 Q1.

Share of Jobs and Share of Estimated Annual Payroll by Industry Sector in Tumwater, 2026 Q1



Source: JobsEQ® Industry Snapshot, Tumwater city, WA, 2026 Q1; exported July 28, 2026. Estimated annual payroll is employment multiplied by average annual wage. Ten largest sectors by payroll shown. Detail in Part 2, Figure ED-11.

Manufacturing

Jobs	Average annual wage	Location quotient	5-yr ann. %	Forecast ann. %
1,379	$74,294	0.70	0.9%	0.5%

Manufacturing makes up a smaller share of Tumwater's economy compared to the national average, and there are no signs that this is likely to increase. The manufacturing strategy in this Element is based on available land, district identity, completion of the Habitat Conservation Plan, and the City Council's aspiration for Tumwater to be known as a community where businesses can make things.

Source: JobsEQ® Industry Snapshot, Tumwater city, WA, 2026Q1; exported July 28, 2026.

Goal ED-4

Target recruitment efforts to support existing businesses and supply-chain gaps.

Goal ED-4 is intended to focus Tumwater's limited recruitment resources on the businesses that provide the highest return on the usage of scarce resources.

Why is this goal important?

Because Tumwater has limited resources for business recruitment, it is important to focus those efforts on businesses well suited to the community. Recruitment is most successful when it targets companies that are a good fit for Tumwater's available sites, infrastructure, workforce skills, and economic strengths.

The most effective recruitment targets for Tumwater are businesses that address existing supply-chain or service gaps for local employers. Attracting companies that fill these gaps strengthens current businesses, increases the chances of success for new businesses, and ensures that Tumwater's limited land is used for industries that provide living-wage jobs and broaden the local employment base.



Goal ED-4 Policies

Policies	Lead
ED-4.1 Define and maintain clear recruitment criteria based on Tumwater's existing businesses, target sectors, available sites, workforce, infrastructure, and community objectives.	EXD
ED-4.2 Prioritize recruitment of businesses that fill supply-chain, contractor, vendor, and service gaps for existing Tumwater employers.	EXD
ED-4.3 Focus recruitment on businesses that offer living-wage jobs, increase exports, and diversify Tumwater's employment base.	EXD
ED-4.4 Market specific Tumwater sites and districts to qualified recruitment opportunities.	EXD
ED-4.5 Align recruitment with workforce development, infrastructure planning, permitting readiness, and business retention efforts.	EXD, CDD, TED
ED-4.6 Track recruitment activity, outcomes, and lessons learned to refine the City's target-business strategy over time.	EXD

What the data shows

Tumwater's high-wage occupations are growing faster than the region's.

9.1%

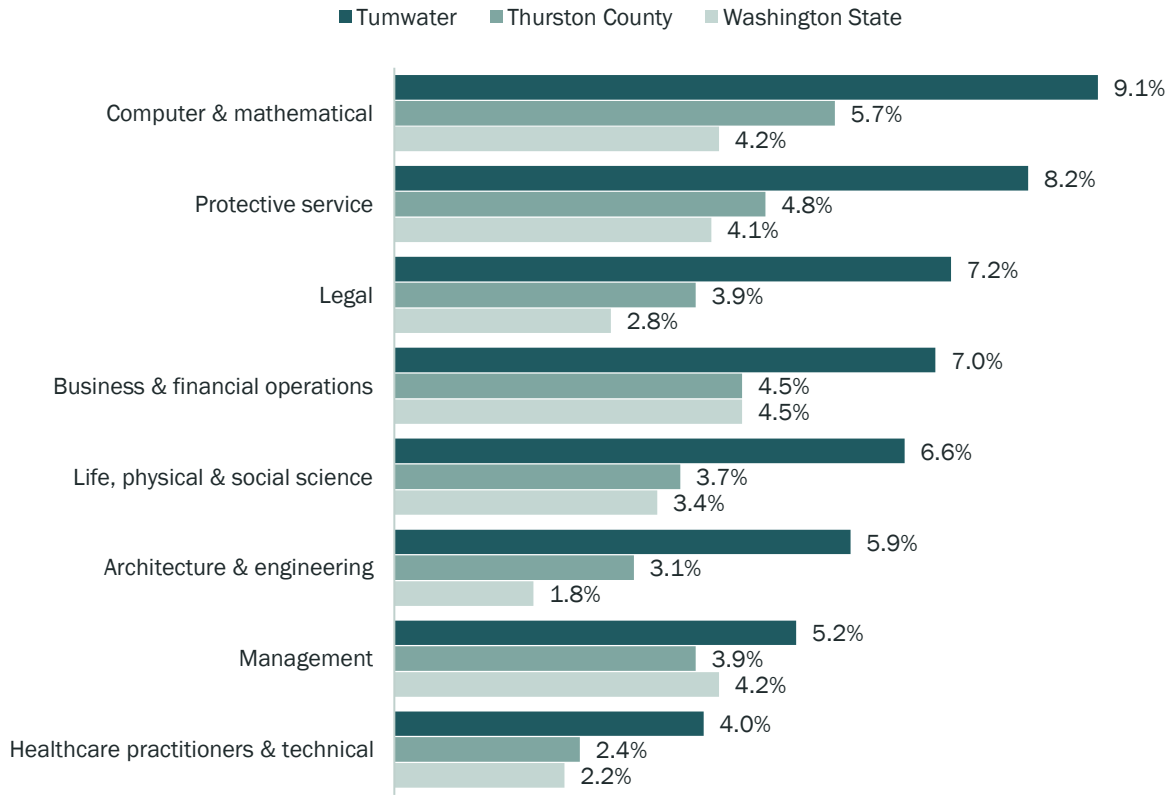
average annual growth in computer and mathematical occupations in Tumwater, 2021 Q1–2026 Q1, compared with 5.7 percent countywide and 4.2 percent statewide.

Tumwater hosts an unusually deep supply of professional and technical labor that businesses serving government and regulated industries require. The industry that would ordinarily employ such workers privately remains underbuilt (Professional, Scientific, and Technical Services stands at a location quotient of 0.89), but it is growing faster than elsewhere in the region, at 11.2 percent annually.

That pairing (abundant talent, an under-concentrated but rapidly growing private sector) signals a strong recruitment opportunity. Candidate activities include environmental and regulatory consulting, government-operations and regulatory technology, legal support services, audit and program administration, and engineering services.

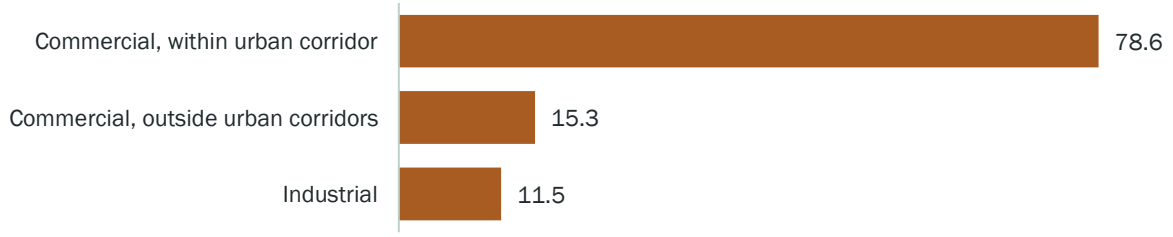
From Part 2, Workforce chapter (Wages & Growth) and SWOT Analysis: Build Private Industry Adjacent to Government. JobsEQ® Occupation and Industry Snapshots, 2026Q1.

Average Annual Employment Growth by High-Wage Occupation Group in Tumwater, Thurston County and Washington State, 2021 Q1-26 Q1



Source: JobsEQ® Occupation Snapshot, Tumwater city, WA, 2026 Q1; exported July 28, 2026. Includes the eight occupation groups with a median annual wage at least 25 percent above the citywide median of $63,400. Detail in Part 2, Table ED-15.

Employees per Developed Acre in Existing Commercial and Industrial Buildings in Tumwater



Source: Thurston Regional Planning Council, 2021 Buildable Lands Report for Thurston County, Table 4-2, p. 50. The same employment growth consumes several times more land in low-intensity formats than in corridor-style development.

Goal ED-5

Redevelop the former Brewery sites to their highest available use.

Goal ED-5 is intended to support returning the former Brewery Complex to productive economic use to create jobs for the community.

Why is this goal important?

The former Brewery sites are Tumwater's most visible redevelopment opportunity. The property carries the City's identity, occupies a prominent position in the Brewery District, and represents a significant concentration of underused land in the heart of the community along Interstate 5.

The barriers to redevelopment, including perceived environmental contamination, aging historic structures, infrastructure needs, and market uncertainty, are larger than any single property owner or market actor can resolve alone. Sustained City coordination on projects like the Planned Action Environmental Impact Statement and the City's brownfield redevelopment program are what make private investment in the former Brewery Complex feasible.

The adjacent Warehouse property is also one of Tumwater's last available industrial lands with rail access, making it a particularly valuable property should the above issues be solved.

Goal ED-5 Policies

Policies	Lead
ED-5.1 Establish a highest available use strategy for the former Brewery sites that balances redevelopment feasibility, historic and community value, environmental constraints, employment potential, and market demand.	EXD, CDD
ED-5.2 Use the Planned Action Environmental Impact Statement (EIS) to reduce redevelopment uncertainty and create a more predictable path for investment in the Brewery District.	EXD, CDD
ED-5.3 Continue to use the City's brownfield program, including existing Environmental Protection Agency and Washington State Department of Ecology grant resources, to assess, plan for, and help address contamination barriers within the Brewery District.	EXD, CDD
ED-5.4 Recognize and promote the unique industrial rail use opportunity at the former Brewery Warehouse site.	EXD, CDD
ED-5.5 Use public investment, infrastructure planning, incentives, partnerships, and regulatory tools to improve site readiness and catalyze private investment in the former Brewery sites.	EXD, TED, WRS, CDD
ED-5.6 Create a coordinated implementation and communications strategy for the former Brewery sites that supports property-owner coordination, developer outreach, grant management, and community understanding.	EXD

What the data shows

The condition of anchor sites constrains district redevelopment.

$283 million

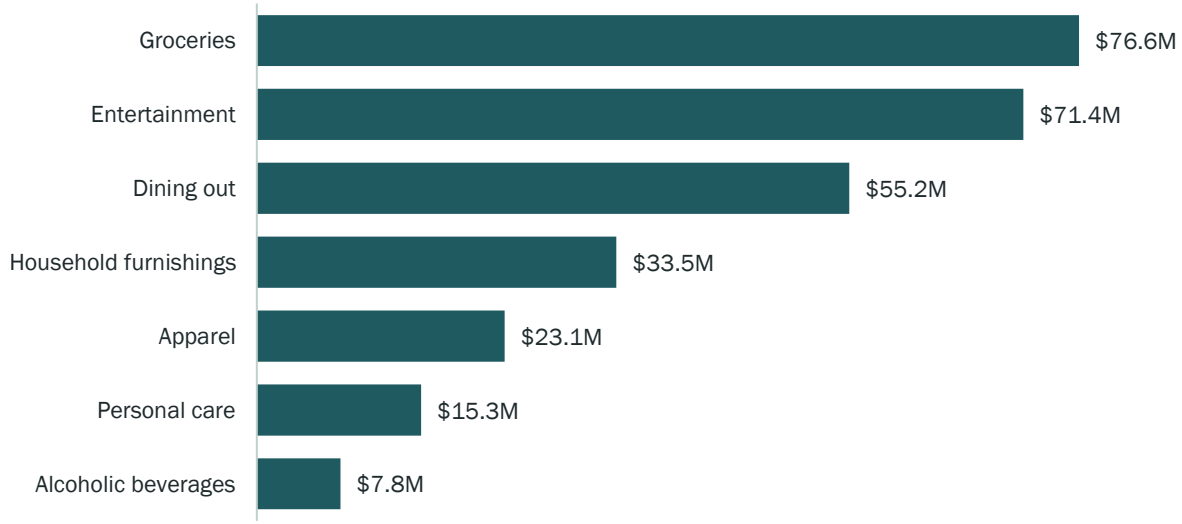
in annual Tumwater household spending falls in categories a local business district can compete for.

Large, historically significant, and underutilized properties occupy anchor positions in Tumwater's priority redevelopment districts, most prominently the former brewery properties in the Brewery District. Where such sites occupy anchor positions in a district, their condition constrains the district as a whole and not merely the individual parcel.

The health of these districts is vital to capturing Tumwater's increasing consumer demand. If Tumwater's significant brownfield challenges can be resolved, redevelopment of the Capitol Corridor and the Brewery District could likely follow.

From Part 2, Household Income and Consumer Demand chapter and SWOT Analysis. Zoom Prospector consumer expenditure estimates, 2025.

Capturable Annual Household Spending by Category in Tumwater, 2025 ($ millions)



Source: Zoom Prospector consumer expenditure estimates, 2025, accessed via the Washington State Department of Commerce Choose Washington site selector, July 28, 2026. Values are nominal 2025 estimates. Detail in Part 2, Table ED-12.

> *"Most new consumer spending will come from new households. It is therefore important to the redevelopment of commercial activity in the Capitol Boulevard Corridor and Brewery District to concentrate new housing in or near these districts when feasible."*
>
> Part 2, Household Income and Consumer Demand

Goal ED-6

Partner with the Port of Olympia to advance economic development opportunities.

Goal ED-6 is intended to support the Port of Olympia in making assets such as the Olympia Regional Airport and the New Market Industrial Campus strong engines for jobs and investment in Tumwater and the region.

Why is this goal important?

Olympia Regional Airport, New Market Industrial Campus, and the surrounding industrial lands in Tumwater fall under the jurisdiction of the Port of Olympia and represent some of the largest areas of developable, job generating land remaining in the region. A partnership between the Port of Olympia and the City is essential to pursue opportunities related to the these areas.

Together, the City and the Port can focus on aviation, aerospace, logistics, and advanced manufacturing opportunities that pay living wages and connect Tumwater to Washington's broader aerospace economy. By developing an industry sector of similar and connected businesses Tumwater can benefit from the concentration of workers, suppliers and innovations that feed into Washington's aerospace economy.

Goal ED-6 Policies

Policies	Lead
ED-6.1 Strengthen partnership with the Port of Olympia to align infrastructure, land use, business recruitment, and airport-area planning with Tumwater's economic development priorities.	EXD, CDD, TED
ED-6.2 Support development of airport-compatible employment and public infrastructure that enable aviation, aerospace, logistics, advanced manufacturing, and related business investment.	EXD, CDD, TED
ED-6.3 Grow a local aerospace and advanced aviation industry sector connected to Olympia Regional Airport, the New Market Industrial Campus, regional workforce assets, and Washington's broader aerospace economy.	EXD
ED-6.4 Use Olympia Regional Airport for economic development in ways compatible with airport safety, environmental, transportation, and community priorities.	EXD, TED, CDD

What the data shows

Tumwater is one of the region's principal locations for industrial job growth.

37.4%

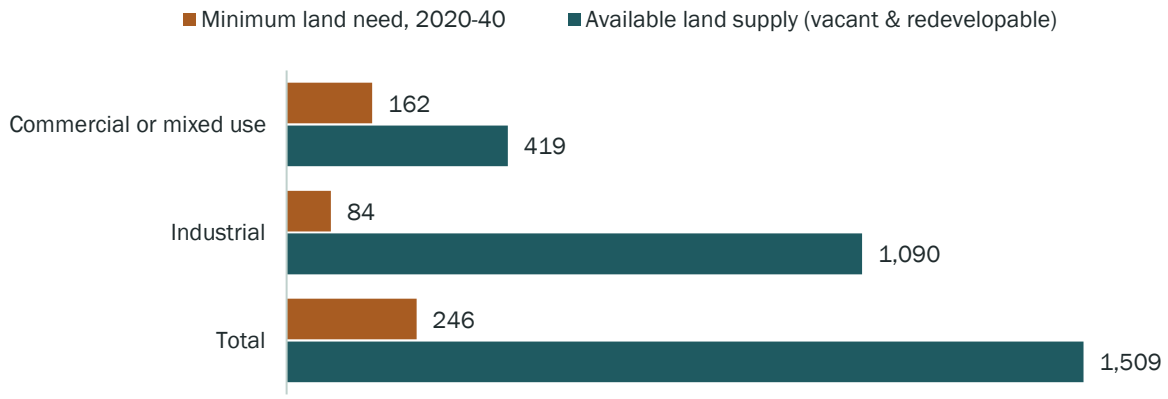
of the industrial-zone job growth forecast for Thurston County's urban areas, 2020–40, is expected in Tumwater and its urban growth area.

The Olympia Regional Airport and the Port of Olympia's New Market Industrial Campus sit within Tumwater and combined with Interstate 5 access and Tumwater's position between the Portland and Seattle markets, form the physical basis of the distribution, logistics, and wholesale strategy supported elsewhere in this analysis.

Access to airport infrastructure also creates opportunities for high-wage employment in aerospace and advanced avionics including training facilities, maintenance and repair and supply chain manufacturing for the aerospace and avionics industries.

From Part 2, Employment Land Needs chapter and SWOT Analysis. Thurston Regional Planning Council, 2021 Buildable Lands Report for Thurston County, Table 4-1.

Commercial and Industrial Land Supply Compared to Minimum Land Need in Tumwater, 2020-40 (acres)



Sources: Thurston Regional Planning Council, 2021 Buildable Lands Report for Thurston County, Tables 4-3 & 4-4, pp. 52-53. Detail in Part 2, Figure ED-12.

> *"The acreage totals therefore describe zoned capacity, not sites ready for immediate occupancy. In both cases, unlocking Tumwater's land capacity depends on significant public investment."*
>
> Part 2, Employment Land Needs: Supply Constraints

Goal ED-7

Conduct business outreach to better connect local economic participants and the City.

Goal ED-7 aims to keep an open, working line of communication between Tumwater's businesses and the city and to better ensure everyone is actively involved in city decisions.

Why is this goal important?

When the City understands business needs, it can respond more helpfully. Regular outreach helps identify expansion plans, retention risks, and regulatory barriers early, empowering time for action. This engagement also provides staff, the City Council, and partners with a clear understanding of local economic conditions.

Outreach also makes City priorities, processes, and economic data easier for businesses to find and understand, which lowers the cost of doing business in Tumwater and increases the City's reputation with employers. The relationships built through outreach support all of the major goals throughout this Element.



Goal ED-7 Policies

Policies	Lead
ED-7.1 Maintain a coordinated business outreach program that connects local businesses, property owners, developers, employers, entrepreneurs, economic development partners, Tumwater Area Chamber of Commerce and the Thurston County Chamber of Commerce (Chambers), and City staff.	EXD
ED-7.2 Use business outreach to inform staff, City Council, and partners about local economic conditions, business needs, investment barriers, and emerging opportunities.	EXD, CDD
ED-7.3 Develop and maintain economic development communication materials, data dashboards, and business resources that make local economic conditions and City processes easier to understand.	EXD
ED-7.4 Strengthen two-way communication between the City and the business community so local economic participants are more visible in City decision-making and better informed about Tumwater's priorities.	EXD
ED-7.5 Define partner roles and accountability measures for business outreach and economic development communication.	EXD

What the data shows

Outreach should meet people where they are rather than assuming a single point of contact.

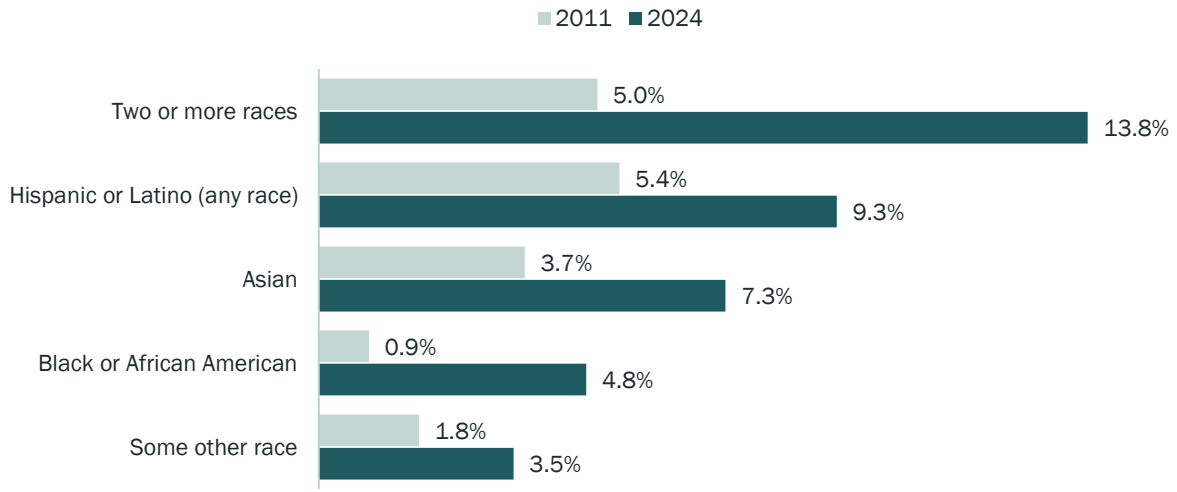
13.8%

of the population now identifies as two or more races rising from 5.0 percent and the population of Hispanic or Latino residents has increased from 5.4 to 9.3 percent.

Culturally responsive business assistance, multilingual permitting guidance, procurement support, and targeted entrepreneurial outreach can expand the pool of new businesses. The evidence also indicates that translation alone is unlikely to be sufficient. Rather, Tumwater should focus on building trust with diverse communities.

From Part 2, Workforce chapter (Who Employs Tumwater's Workforce) and SWOT Analysis: Support Inclusive Entrepreneurship.

Share of Population by Race and Ethnicity in Tumwater, 2011 and 2024



Source: JobsEQ®, U.S. Census American Community Survey 5-Year Estimates ending in the year shown; exported July 28, 2026. Groups whose share grew between 2011 and 2024 shown; White (alone) fell from 86.2 to 69.3 percent. Detail in Part 2, Table ED-3.

Goal ED-8

Strengthen Tumwater's community and district vibrancy to advance the community as a regional destination through placemaking.

Goal ED-8 is intended to make Tumwater's planning districts distinct, active places that draw people, businesses, and investment.

Why is this goal important?

The quality of a place is an economic asset. Workers increasingly choose where to live before they choose where to work, and businesses follow talent. Distinct, active districts also give existing businesses more customers, longer visits, and a stronger setting for investment.

As shown in Part 2 Section 4-D, Tumwater has the strongest per-capita consumer demand when compared to neighboring jurisdictions. As more people move to the area and demand increases, there is greater interest in shopping experiences that are unique, attractive, and have a strong local identity. To capture this increase in consumer demand and prevent individuals from shopping in other areas, Tumwater must create vibrant local shopping hubs that fill these needs.

Due to Tumwater's unique heritage, history and natural assets like the Deschutes River, Pioneer Park and adjacency to the State Capitol, Tumwater is positioned to take advantage of tourism opportunities as it develops districts with identities and aesthetics that can attract tourism into experiences within the city.

Goal ED-8 Policies

Policies	Lead
ED-8.1 Build a clear placemaking identity for Tumwater that connects the City's districts, natural assets, heritage, sports, culture, and quality of life.	EXD, PRD
ED-8.2 Strengthen Tumwater's business districts as active and identifiable places that support local business growth and community life.	EXD, CDD
ED-8.3 Use placemaking, aesthetic improvements, and active public spaces to improve livability and strengthen private investment potential.	EXD, PRD, TED, CDD
ED-8.4 Advance Tumwater's visitor appeal by improving wayfinding, aesthetics, tourism assets, event activity, and connections among key destinations.	EXD, PRD, CDD
ED-8.5 Coordinate actions with the Land Use and Housing Elements to encourage housing, mixed-use activity, and multimodal connections that support vibrant districts and allow more people to live near jobs, services, and amenities.	CDD, EXD, TED

What the data shows

Tumwater households outspend their neighbors, but the market is smaller.

8.9%

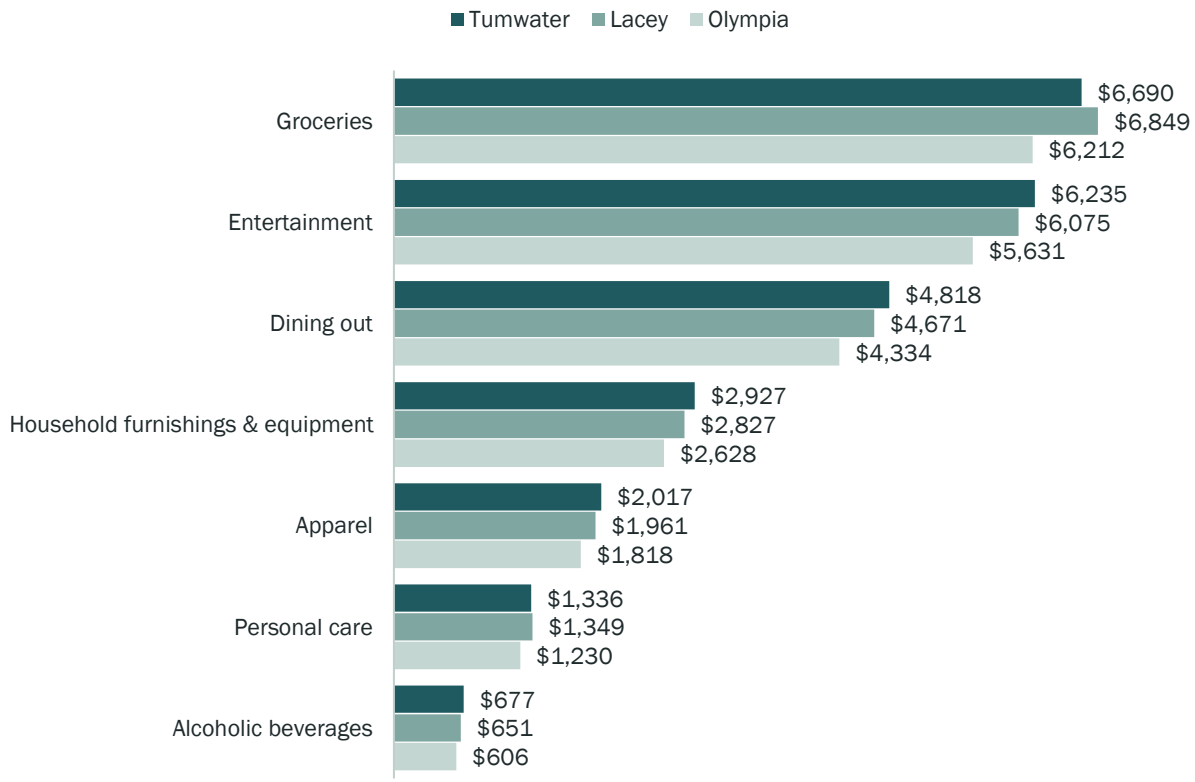
average annual employment growth in Arts, Entertainment & Recreation, 2021Q1–2026Q1, a sector concentrated at 1.47 times the national average.

Combined with Tumwater's brewing heritage, the Deschutes River corridor, historic sites, and parks, this sector provides the foundation for a destination and identity strategy that could draw spending from beyond the resident base and help offset Tumwater's smaller regional consumer demand totals.

More than a quarter of employed Tumwater residents now work from home, up from about 4 percent in 2011. Investing in attractive business districts, placemaking efforts, welcoming gathering places and neighborhood-scale commercial development are strategies that Tumwater can leverage to keep local business districts vibrant.

From Part 2, SWOT Analysis: Establish a Tourism and Place-Branding Strategy; Convert Remote Work into Local Economic Activity. JobsEQ® Industry Snapshot, 2026Q1; American Community Survey via JobsEQ®.

Discretionary Expenditures per Household in Tumwater, Lacey and Olympia, 2025



Source: Zoom Prospector consumer expenditure estimates, 2025, accessed via the Washington State Department of Commerce Choose Washington site selector, July 28, 2026. Values are nominal 2025 estimates. Detail in Part 2, Figure ED-7.

Total Annual Household Spending in Tumwater, Lacey & Olympia, 2025 ($ billions)



Source: Zoom Prospector consumer expenditure estimates, 2025, accessed via the Washington State Department of Commerce Choose Washington site selector, July 28, 2026. Tumwater offers retailers relatively high per-household spending, but a smaller customer base.

Goal ED-9

Develop an affordability strategy that secures equitable access to Tumwater's future growth for all people by expanding the supply of housing, childcare, education, and energy options.

Goal ED-9 is intended to keep Tumwater affordable enough that the people who work in the community can continue to live and thrive within it.

Why is this goal important?

The cost of housing, childcare, education, and energy determines who can participate in Tumwater's economy. If workers cannot afford to live near their jobs, employers will struggle to hire and retain staff, worker commutes lengthen, and economic mobility decreases for individuals at the beginning of their careers.

The technical analysis in Part 2 shows that housing costs have risen steeply and that housing that is affordable to working households is limited. This shortage has led to the pricing out of lower income populations as is suggested by the technical analysis section on income distribution.

This goal treats affordability as economic infrastructure by expanding the supply of the essentials working households need.

Goal ED-9 Policies

Policies	Lead
ED-9.1 In coordination with the Housing Element goals, increase the supply and variety of housing options available to workers, families, seniors, young adults, and cost-burdened households.	CDD, EXD
ED-9.2 Increase access to education, training, and career pathways that expand residents' ability to obtain living-wage employment.	EXD
ED-9.3 Reduce long-term household and small-business energy cost burdens by expanding access to energy efficiency and clean energy programs, electrification, and resilient infrastructure.	WRS, EXD
ED-9.4 Identify market conditions that would attract child care and elder care services.	EXD

What the data shows

Housing is an economic development instrument, not an adjacent policy area.

47.7%

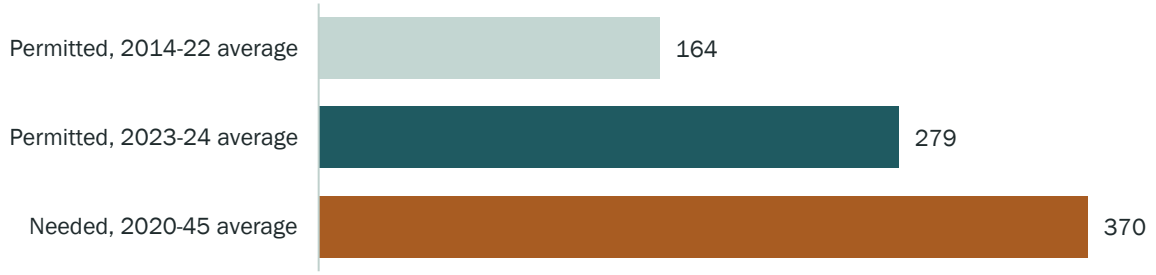
of Tumwater renter households were cost-burdened in 2023, spending more than 30 percent of income on housing.

The ownership market offers workers at median income few points of entry, and the rental market that absorbs them consumes an outsized share of their income. Every dollar a cost-burdened household spends on housing is a dollar unavailable to the local consumer economy to support small businesses.

Meeting the adopted allocation, roughly 370 units per year with more than three-fifths affordable at or below 80 percent of area median income, will help support the workforce and consumer base on which many of this Element's strategies depend.

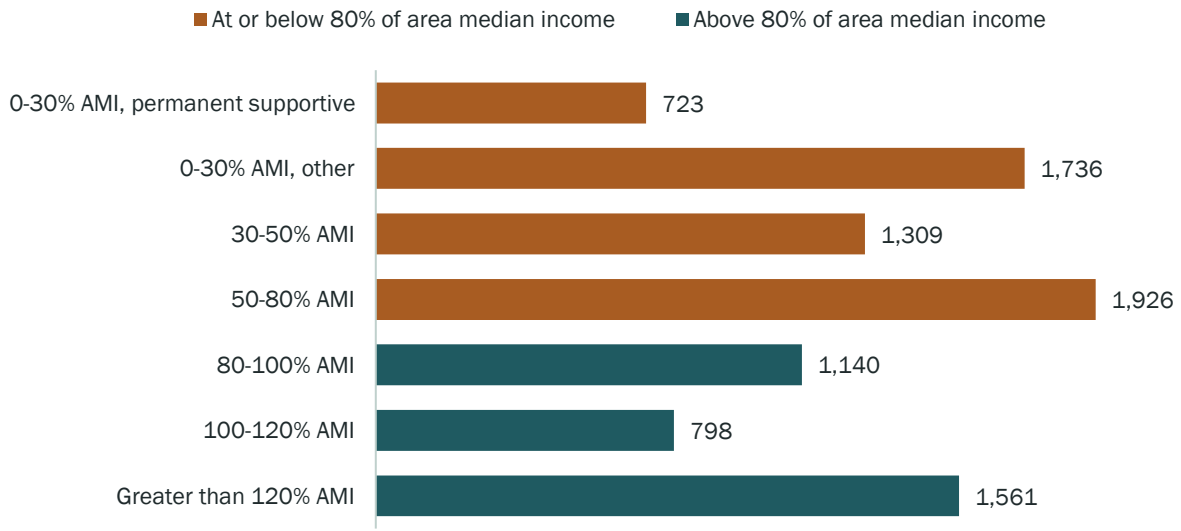
From Part 2, Housing chapter and SWOT Analysis. Cost burden: 2023 U.S. Census American Community Survey 5-Year Estimates, Table DP04, as presented in the Tumwater Housing Element, Part 2, Table H-9.

Average Annual Housing Units Permitted in Tumwater Compared with Average Annual Need



Sources: County and Place Building Permit Data Report, second quarter 2025 edition, place annual data for Tumwater, 2014-24; Thurston Regional Planning Council, Planning for and Accommodating Housing Needs in Thurston County, 2025. Need is 9,192 units over 2020-45, about 370 per year.

Housing Need Allocation for Tumwater & Its Urban Growth Area by Income Level, 2020-45 (units)



Source: Thurston Regional Planning Council, Planning for and Accommodating Housing Needs in Thurston County, 2025, as presented in the Tumwater Housing Element, Part 2, Table H-18. Of 9,192 units, 5,694 (about 62 percent) are needed at or below 80 percent of area median income.

Appendix A

Draft Implementation Actions

To achieve the goals and policies in Chapter 3 of this Element, Tumwater will need to take specific actions over the next 20 years. The draft implementation actions listed below were created with input from regional partners, the community, and Tumwater staff. These draft actions will help form the annual work programs that carry out this Element's goals and policies.

The draft implementation actions will be refined further before they are included in Tumwater's annual work programs. As the Comprehensive Plan is implemented over the next 20 years, these actions may be updated, replaced, or expanded as new opportunities arise.

How to Read These Tables

This Element's goals, policies, and draft implementation actions are not in priority order.

Period

Each of this Element's policies and draft implementation actions are associated with estimated start dates, length of time to complete, and target completion dates, if appropriate, based on adequate funding for staff and resources. Most policies are ongoing with no set target completion date.

Department Leads

Implementation of this Element's policies and implementation actions are associated with several different Tumwater departments:

CDD	Community Development Department
EXD	Executive Department
PRD	Parks, Recreation, and Facilities Department
RCW	Revised Code of Washington
TED	Transportation & Engineering Department
WRS	Water Resources & Sustainability Department

Economic Development Goals

Goal ED-1

Establish a predictable, responsive, and investment-ready development climate that stimulates economic activity and private investment.

Policies and Implementation Actions	Lead
ED-1.1 Maintain regular two-way communication with businesses, residents, development applicants, and economic development partners to align City priorities, regulations, and service delivery with community and market needs.	EXD, CDD
ED-1.1.1 Implement a coordinated economic development outreach program with City partners, including periodic partner check-ins, regular outreach to major employers, opportunities for business-owner feedback, and exit interviews with businesses that leave Tumwater when feasible.	EXD, CDD
ED-1.1.2 Use City communication channels to explain economic development priorities, major private-sector activity, regulatory changes, and opportunities for public input in plain language.	EXD, CDD
ED-1.1.3 Maintain a clear staff point of contact for economic development partners and development-related business assistance and participate regularly in partner meetings.	EXD
ED-1.2 Make development review predictable, timely, and easy to understand for businesses, developers, and property owners while maintaining adopted community standards.	CDD, EXD
ED-1.2.1 Maintain a development-applicant feedback loop and use the results to improve permitting guidance, submittals, timelines, and customer service.	CDD, EXD
ED-1.2.2 Provide consistent, accurate, and plain-language development information through the City website, handouts, pre-application materials, and documented staff guidance.	CDD, EXD
ED-1.2.3 Evaluate whether targeted process improvements, expedited review options, updated permitting tools, or dedicated funding mechanisms would improve development review performance.	CDD, EXD

Policies and Implementation Actions	Lead
ED-1.3 Promote Tumwater as a competitive location for private investment by clearly communicating its market position, development opportunities, and priority investment areas.	EXD
ED-1.3.1 Maintain a concise set of economic development messages for use on the City website, in partner marketing, in printed or digital materials, and in business recruitment or development discussions.	EXD
ED-1.3.2 Maintain easy-to-find economic development web content that includes market data, development process guidance, priority opportunity areas, and contact information.	EXD
ED-1.3.3 Create and periodically update investment materials that summarize Tumwater demographics, market conditions, available sites, priority geographies, and suitable uses such as office, light industrial, manufacturing, retail, and mixed-use development.	EXD

Goal ED-2

Support the retention and growth of Tumwater's existing businesses and entrepreneurs.

Policies and Implementation Actions	Lead
ED-2.1 Maintain a proactive business retention and expansion program focused on existing employers through partner organizations.	EXD
ED-2.1.1 Implement a structured business outreach program, including regular contact with key employers, growing businesses, and businesses facing expansion or retention challenges.	EXD
ED-2.1.2 Provide coordinated site-location, permitting, and problem-solving assistance for existing businesses seeking to expand or remain in Tumwater.	EXD
ED-2.1.3 Track business needs, expansion opportunities, infrastructure constraints, and retention risks identified through outreach and use the information to inform City work programs.	EXD
ED-2.2 Strengthen key industry clusters by supporting existing businesses and attracting complementary businesses.	EXD

Policies and Implementation Actions	Lead
ED-2.2.1 Identify priority clusters and complementary business opportunities based on local industry strengths, employer outreach, market data, and regional partner intelligence.	EXD
ED-2.2.2 Coordinate with regional partners to support co-location, supplier relationships, and recruitment of businesses that complement Tumwater's existing employers.	EXD
ED-2.3 Support small businesses and entrepreneurs through accessible City processes, partnerships, and targeted programs.	EXD, CDD
ED-2.3.1 Review development regulations and City processes for small-business impacts and address recurring barriers identified through outreach.	CDD, EXD
ED-2.3.2 Work with partners to connect small businesses and entrepreneurs with training, mentoring, technical assistance, financing resources, and other business support services.	EXD, CDD
ED-2.3.3 Consider targeted small-business tools such as shop-local campaigns, facade or placemaking assistance, and small grants or loans when funding and partner capacity are available.	EXD, CDD
ED-2.3.4 Create outcomes, metrics, goals, and reporting standards for economic development partners to track and communicate business successes.	EXD, CDD
ED-2.4 Align workforce and education partnerships with the needs of Tumwater businesses.	EXD
ED-2.4.1 Partner with the Tumwater School District, New Market Skills Center, South Puget Sound Community College, workforce organizations, and employers to strengthen talent pool for local industries.	EXD
ED-2.4.2 Use business outreach findings to help education and workforce partners understand hiring needs, skill gaps, and opportunities for career-connected learning.	EXD

Goal ED-3

Grow and diversify Tumwater's exports, with a focus on manufacturing.

Policies and Implementation Actions	Lead
ED-3.1 Protect and strategically utilize light industrial zoned lands to support sustainable long-term economic growth.	CDD, EXD
ED-3.1.1 Conduct regular outreach to industrial and manufacturing businesses to identify retention needs, expansion opportunities, infrastructure barriers, and redevelopment constraints.	EXD
ED-3.1.2 Evaluate industrial zoning, development standards, and site readiness to ensure that industrial and manufacturing uses remain feasible in appropriate locations.	CDD, EXD
ED-3.2 Identify and support priority sectors that align with Tumwater's assets, workforce, land base, and diversification goals.	EXD
ED-3.2.1 Define priority sectors using economic data, local assets, regional competitiveness, available sites, and alignment with Tumwater's goals.	EXD
ED-3.2.2 Align business outreach, recruitment, marketing, workforce partnerships, and infrastructure planning with Tumwater's priority sectors.	EXD
ED-3.3 Position Tumwater to participate in and benefit from clean energy, green business, and sustainable industry growth.	EXD, WRS
ED-3.3.1 Support existing clean energy and green businesses and work with partners to recruit, retain, and grow similar businesses.	EXD, WRS
ED-3.4 Support and connect workforce development and education partners to promote the needs of Tumwater's target industries and employers.	EXD
ED-3.4.1 Partner with schools, colleges, workforce organizations, and employers to support training pathways connected to priority sectors and local hiring needs.	EXD
ED-3.4.2 Facilitate employer connections with education and workforce partners to improve talent pools, career awareness, and job access for residents.	EXD
ED-3.5 Leverage Tumwater's government employment base to grow complementary private sector industries and reduce long-term dependence on public sector employment.	EXD

Policies and Implementation Actions	Lead
ED-3.5.1 Support the growth and recruitment of professional services, technology, contractors, and other businesses that serve or complement government, education, and civic institutions.	EXD
ED-3.5.2 Work with education and workforce partners to strengthen skill pools for government-adjacent sectors, including professional services, technology, administration, and contracting.	EXD
ED-3.5.3 Evaluate regulatory, permitting, taxation, and space needs that affect small-scale professional service, technology, and contractor businesses.	EXD

Goal ED-4

Target recruitment efforts to support existing businesses and supply-chain gaps.

Policies and Implementation Actions	Lead
ED-4.1 Define and maintain clear recruitment criteria based on Tumwater's existing businesses, target sectors, available sites, workforce, infrastructure, and community objectives.	EXD
ED-4.1.1 Maintain a target-business profile identifying preferred industry characteristics, wage levels, space needs, workforce needs, infrastructure needs, and compatibility with Tumwater's land use pattern.	EXD, CDD
ED-4.1.2 Use business outreach, industry data, site inventories, and partner input to identify gaps in local supply chains and business services.	EXD
ED-4.1.3 Review and update recruitment criteria on a regular basis to reflect economic conditions, employer feedback, and available development opportunities.	EXD
ED-4.1.4 Target recruitment by economizing scarce ecological inputs like land, water, and carbon emissions to their highest use to maximize returns in terms of jobs, wages, and revenue generated.	EXD, WRS
ED-4.2 Prioritize recruitment of businesses that fill supply-chain, contractor, vendor, and service gaps for existing Tumwater employers.	EXD
ED-4.2.1 Interview major employers and targeted small businesses to identify frequently used suppliers, contractors, professional services, logistics providers, and production inputs that are not readily available locally.	EXD

Policies and Implementation Actions	Lead
ED-4.2.2 Work with regional economic development partners to identify businesses that already serve Tumwater employers or comparable employers elsewhere and may be candidates for local expansion or relocation.	EXD
ED-4.2.3 Encourage co-location or nearby location of complementary businesses where it would reduce costs, improve business retention, or create opportunities for shared workforce and infrastructure investments.	EXD
ED-4.3 Focus recruitment on businesses that offer living-wage jobs, increase exports, and diversify Tumwater's employment base.	EXD
ED-4.3.1 Prioritize industrial, manufacturing, clean energy, technology, logistics, business-to-business service, and other traded-sector employers when they are compatible with available land and infrastructure.	EXD
ED-4.3.2 Evaluate recruitment prospects based on wage quality, career pathways, local hiring potential, tax base contribution, supply-chain value, and compatibility with adopted plans and regulations.	EXD
ED-4.3.3 Avoid devoting significant recruitment resources to prospects that would consume scarce employment land without producing meaningful employment, wage, supply-chain, or diversification benefits.	EXD
ED-4.4 Market specific Tumwater sites and districts to qualified recruitment opportunities.	EXD
ED-4.4.1 Maintain a current inventory of priority commercial, industrial, redevelopment, and infill sites suitable for target employers.	EXD
ED-4.4.2 Prepare recruitment materials that connect each opportunity area to allowed uses, infrastructure, transportation access, workforce assets, permitting considerations, and nearby complementary businesses.	EXD
ED-4.4.3 Coordinate with property owners, brokers, the Port, the Thurston Economic Development Council, and regional partners to respond quickly to qualified business leads.	EXD
ED-4.5 Align recruitment with workforce development, infrastructure planning, permitting readiness, and business retention efforts.	EXD, CDD, TED
ED-4.5.1 Connect recruitment prospects with workforce and education partners when talent availability is a key location factor.	EXD
ED-4.5.2 Use business recruitment and expansion leads to inform capital planning, utility planning, transportation priorities, and site-readiness efforts.	EXD, CDD, TED

Policies and Implementation Actions	Lead
ED-4.5.3 Provide a coordinated staff point of contact for qualified recruitment prospects to help identify sites, clarify permitting requirements, and resolve process questions early.	EXD, CDD, TED
ED-4.6 Track recruitment activity, outcomes, and lessons learned to refine the City's target-business strategy over time.	EXD
ED-4.6.1 Track qualified leads, target-sector inquiries, employer supply-chain needs, site matches, expansions, relocations, jobs, wages, capital investment, and reasons prospects choose or reject Tumwater.	EXD
ED-4.6.2 Provide periodic updates to decision-makers on recruitment activity, strategic gaps, and barriers that require policy, infrastructure, or partnership responses.	EXD
ED-4.6.3 Use recruitment outcomes and employer feedback to refine target sectors, site-readiness priorities, and partner work plans.	EXD

Goal ED-5

Redevelop the former Brewery sites to their highest available use.

Policies and Implementation Actions	Lead
ED-5.1 Establish a highest available use strategy for the former Brewery sites that balances redevelopment feasibility, historic and community value, environmental constraints, employment potential, and market demand.	EXD, CDD
ED-5.1.1 Identify preferred redevelopment outcomes for the former Brewery Sites, including appropriate employment, industrial, commercial, mixed-use, historic, civic, open space, and public-access components.	EXD, CDD
ED-5.1.2 Evaluate redevelopment scenarios based on market feasibility, infrastructure needs, environmental conditions, historic preservation considerations, public benefit, fiscal impact, and consistency with adopted plans.	EXD, CDD
ED-5.1.3 Coordinate with property owners, public agencies, community stakeholders, and private developers to align redevelopment concepts with realistic site conditions and investment requirements.	EXD

Policies and Implementation Actions	Lead
ED-5.2 Use the Planned Action Environmental Impact Statement (EIS) to reduce redevelopment uncertainty and create a more predictable path for investment in the Brewery District.	EXD, CDD
ED-5.2.1 Complete and implement the Planned Action EIS to evaluate redevelopment impacts, identify mitigation measures, and establish a predictable review framework for qualifying future projects.	EXD, CDD
ED-5.2.2 Use the Planned Action EIS to clarify infrastructure, transportation, shoreline, floodplain, environmental, and historic requirements that affect redevelopment feasibility.	EXD, CDD
ED-5.2.3 Translate Planned Action EIS findings into plain-language developer materials that explain likely requirements, mitigation triggers, sequencing issues, and available public tools.	EXD, CDD
ED-5.3 Continue to use the City's brownfield program, including existing Environmental Protection Agency and Washington State Department of Ecology grant resources, to assess, plan for, and help address contamination barriers within the Brewery District.	EXD, CDD
ED-5.3.1 Leverage Environmental Protection Agency and Washington State Department of Ecology grant resources to support eligible assessment, planning, cleanup planning, and community outreach.	EXD, CDD
ED-5.3.2 Coordinate environmental assessment and cleanup planning with redevelopment scenarios so that technical work answers the questions most relevant to future investment.	EXD, CDD
ED-5.3.3 Communicate brownfield findings and cleanup pathways through the development of a cleanup roadmap.	EXD, CDD
ED-5.4 Recognize and promote the unique industrial rail use opportunity at the former Brewery Warehouse site.	EXD, CDD
ED-5.4.1 Prioritize reuse concepts for the Warehouse property that preserve or enhance rail-served industrial, clean technology, or other employment-generating uses where feasible.	EXD, CDD
ED-5.4.2 Evaluate proposed non-industrial reuse of the Warehouse property against the long-term loss of rail-served employment land and the availability of alternative sites for the proposed use.	EXD, CDD

Policies and Implementation Actions	Lead
ED-5.4.3 Coordinate with rail, property, Port of Olympia, utility, and economic development partners to understand infrastructure needs and market opportunities for rail-compatible users.	EXD, CDD
ED-5.5 Use public investment, infrastructure planning, incentives, partnerships, and regulatory tools to improve site readiness and catalyze private investment in the former Brewery sites.	EXD, TED, WRS, CDD
ED-5.5.1 Identify priority public investments needed to unlock redevelopment, including utilities, transportation access, multimodal connections, public spaces, environmental work, and district-serving infrastructure.	EXD, TED, WRS
ED-5.5.2 Evaluate targeted incentives, fee timing strategies, grants, tax tools, or public-private partnerships where they would materially improve redevelopment feasibility and produce public benefit.	EXD, CDD
ED-5.6 Create a coordinated implementation and communications strategy for the former Brewery sites that supports property-owner coordination, developer outreach, grant management, and community understanding.	EXD
ED-5.6.1 Maintain a current redevelopment action plan identifying lead responsibilities, partner roles, funding opportunities, near-term decisions, and key milestones.	EXD
ED-5.6.2 Prepare developer-facing materials that summarize the site opportunity, known constraints, Planned Action EIS status, brownfield program resources, infrastructure needs, and desired redevelopment outcomes.	EXD
ED-5.6.3 Provide periodic updates to decision-makers and the community on redevelopment progress, grant-supported brownfield work, Planned Action EIS milestones, barriers, and next steps.	EXD

Goal ED-6

Partner with the Port of Olympia to advance economic development opportunities.

Policies and Implementation Actions	Lead
ED-6.1 Strengthen partnership with the Port of Olympia to align infrastructure, land use, business recruitment, and airport-area planning with Tumwater's economic development priorities.	EXD, CDD, TED

Policies and Implementation Actions	Lead
ED-6.1.1 Establish regular coordination with the Port of Olympia on airport-area economic development, including land readiness, infrastructure needs, transportation access, utilities, permitting issues, and business recruitment opportunities.	EXD, CDD, TED
ED-6.1.2 Coordinate City economic development priorities with Port airport-area planning, real estate planning, airport master planning, transportation planning, and capital facility planning.	EXD, CDD, TED
ED-6.2 Support development of airport-compatible employment and public infrastructure that enable aviation, aerospace, logistics, advanced manufacturing, and related business investment.	EXD, CDD, TED
ED-6.2.1 Work with the Port and regional partners to identify and prioritize public infrastructure investments needed to unlock airport-adjacent employment lands, including streets, utilities, power capacity, broadband, stormwater, multimodal access, and connections to airport-supportive facilities.	EXD, CDD, TED
ED-6.2.2 Coordinate with the Port, utilities, energy providers, emergency service providers, and regulatory agencies to evaluate infrastructure needs for electric aircraft, advanced air mobility, electric vertical takeoff and landing aircraft (eVTOL)-related operations, charging systems, and other emerging airport technologies.	EXD, CDD, TED
ED-6.3 Grow a local aerospace and advanced aviation industry cluster connected to Olympia Regional Airport, the New Market Industrial Campus, regional workforce assets, and Washington's broader aerospace economy.	EXD
ED-6.3.1 Recruit and support aviation- and aerospace-related businesses, including aircraft maintenance, avionics, component manufacturing, unmanned systems, composites, robotics, aircraft electrification, eVTOL-related suppliers, and specialized service businesses.	EXD
ED-6.3.2 Partner with the Port, education providers, workforce organizations, and industry partners to develop aerospace, aviation maintenance, avionics, robotics, composites, electric aircraft, and advanced manufacturing training pathways.	EXD
ED-6.3.3 Promote Tumwater's position within the Washington aerospace economy while focusing recruitment on businesses that fit the scale, land capacity, infrastructure, and workforce realities of the Olympia Airport area.	EXD
ED-6.4 Use Olympia Regional Airport for economic development in ways compatible with airport safety, environmental, transportation, and community priorities.	EXD, TED, CDD

Policies and Implementation Actions	Lead
ED-6.4.1 Evaluate realistic airport-related business access and logistics opportunities, including general aviation, charter activity, small cargo, emergency services, training, aircraft maintenance, and passenger travel.	EXD
ED-6.4.2 Ensure airport-area economic development is coordinated with safety, airspace, noise, environmental, emergency response, transportation, and community compatibility considerations.	EXD, CDD
ED-6.4.3 Develop airport-area marketing and recruitment materials that describe target industries, available employment lands, infrastructure needs, public infrastructure priorities, and the City's desired role in supporting development.	EXD, TED, WRS

Goal ED-7

Conduct business outreach to better connect local economic participants and the City.

Policies and Implementation Actions	Lead
ED-7.1 Maintain a coordinated business outreach program that connects local businesses, property owners, developers, employers, entrepreneurs, economic development partners, Chambers, and City staff.	EXD
ED-7.1.1 Prepare and maintain an annual business outreach work plan that identifies priority audiences, outreach methods, partner roles, and follow-up responsibilities.	EXD
ED-7.1.2 Conduct business outreach through a mix of business visits, district walks, listening sessions, surveys, sector-specific convenings, partner referrals, and direct communication with businesses seeking City assistance.	EXD
ED-7.1.3 Coordinate outreach with economic development partners, Chambers, business associations, the Port of Olympia, workforce partners, education providers, and other organizations that regularly interact with local employers.	EXD
ED-7.1.4 Maintain a clear City point of contact and referral process for businesses seeking help with permitting, site selection, expansion, relocation risk, workforce connections, public infrastructure issues, or other business needs.	EXD
ED-7.2 Use business outreach to inform staff, City Council, and partners about local economic conditions, business needs, investment barriers, and emerging opportunities.	EXD, CDD

Policies and Implementation Actions	Lead
ED-7.2.1 Track themes from business outreach, including workforce needs, permitting issues, infrastructure constraints, real estate and site needs, safety concerns, code enforcement concerns, financing gaps, expansion opportunities, relocation risks, and regulatory barriers.	EXD, CDD, TED, WRS
ED-7.2.2 Develop a process to identify businesses at risk of leaving and businesses ready to expand, and connect them with appropriate City, partner, workforce, permitting, or infrastructure assistance.	EXD, CDD, TED
ED-7.2.3 Provide periodic economic conditions briefings to City Council and staff using outreach findings, local data, development activity, and partner input.	EXD
ED-7.2.4 Use outreach findings to inform code updates, permitting improvements, infrastructure priorities, capital planning, business retention work, and economic development communications.	EXD, CDD, TED
ED-7.3 Develop and maintain economic development communication materials, data dashboards, and business resources that make local economic conditions and City processes easier to understand.	EXD
ED-7.3.1 Maintain an economic development dashboard or periodic data brief with key indicators such as employment, wages, industry mix, business activity, development activity, permit activity, major projects, consumer demand, and site opportunities.	EXD
ED-7.3.2 Maintain plain-language business resource materials that explain City contacts, development processes, permitting steps, available assistance, partner resources, incentives, district opportunities, and common business questions.	EXD, CDD
ED-7.3.3 Prepare district, corridor, and site-specific materials that summarize available property, allowable uses, infrastructure conditions, market context, and Tumwater priorities.	EXD, CDD
ED-7.3.4 Keep economic development information current on Tumwater's website and distribute updates through City channels, partners, Chambers, business associations, and other trusted networks.	EXD
ED-7.4 Strengthen two-way communication between the City and the business community so local economic participants are more visible in City decision-making and better informed about Tumwater's priorities.	EXD
ED-7.4.1 Develop a business communication strategy with tailored messages and channels for small businesses, major employers, property owners, developers, entrepreneurs, industrial users, office employers, and district-based businesses.	EXD

Policies and Implementation Actions	Lead
ED-7.4.2 Create regular channels for business-facing updates, such as an economic development newsletter, partner-distributed updates, or targeted alerts.	EXD
ED-7.4.3 Invite local business perspectives into City Hall through Council briefings, staff learning sessions, business introductions, site visits, and targeted input when policies or projects affect local economic conditions.	EXD
ED-7.4.4 Use outreach to include underrepresented, home-based, emerging, non-English-speaking, and small-scale businesses that may not be connected to formal business organizations.	EXD
ED-7.5 Define partner roles and accountability measures for business outreach and economic development communication.	EXD
ED-7.5.1 Use contracts, scopes of work, memoranda of understanding, or annual partner work plans to define outreach roles, referral protocols, reporting expectations, and coordination practices.	EXD
ED-7.5.2 Evaluate the outreach program annually using measures such as businesses contacted, jobs created, labor income created, tax revenue generated and sector representation.	EXD

Goal ED-8

Strengthen Tumwater's community and district vibrancy to advance the community as a regional destination through placemaking.

Policies and Implementation Actions	Lead
ED-8.1 Build a clear placemaking identity for Tumwater that connects the City's districts, natural assets, heritage, sports, culture, and quality of life.	EXD, PRD
ED-8.1.1 Develop a placemaking and destination identity framework that identifies Tumwater's core place assets, including healthy business districts, sports facilities and events, the Deschutes River and natural setting, historic resources, arts and culture, schools and neighborhoods, and other visitor or community anchors.	EXD, PRD
ED-8.1.2 Use consistent placemaking messages in City communications, economic development materials, tourism partnerships, wayfinding, district promotion, and business outreach.	EXD, PRD

Policies and Implementation Actions	Lead
ED-8.1.3 Support festivals, events, cultural activities, and district activation efforts that reinforce Tumwater's identity and bring residents, workers, and visitors into local business districts.	EXD, CDD
ED-8.2 Strengthen Tumwater's business districts as active and identifiable places that support local business growth and community life.	EXD, CDD
ED-8.2.1 Name, map, and promote Tumwater's business districts and community-serving centers using clear district profiles, opportunity summaries, and consistent public-facing materials.	EXD, CDD
ED-8.2.2 Support community-oriented development models, including neighborhood serving retail, grocery anchored centers, small-scale mixed-use areas, and local-serving commercial nodes.	EXD, CDD
ED-8.2.3 Provide facilitation, technical assistance, or partner referrals for business owners and property owners interested in district management, design assistance, coordinated marketing such as Business Improvement Areas, Creative Districts, or similar tools.	EXD, CDD
ED-8.2.4 In coordination with the Land Use Element, evaluate development standards, parking, access, streetscape, and design requirements in priority districts to ensure they support walkable, attractive, and economically viable community-serving development.	CDD, TED, EXD
ED-8.3 Use placemaking, aesthetic improvements, and active public spaces to improve livability and strengthen private investment potential.	EXD, PRD, TED, CDD
ED-8.3.1 Prioritize aesthetic improvements that improve the comfort, safety, visibility, and economic function of priority districts, including sidewalks, crossings, lighting, trees, landscaping, signage, gateways, seating, and small-scale public spaces.	EXD, PRD, TED, CDD
ED-8.3.2 Use public art, cultural markers, interpretive signage, historic references, and high-quality design elements to strengthen district identity and create memorable public spaces.	EXD, PRD, TED, CDD
ED-8.3.3 Improve pedestrian, bicycle, transit, and trail connections between districts, parks, civic anchors, the former Brewery Complex and Craft District, the Deschutes River, and other visitor-serving destinations through the Transportation Plan.	EXD, PRD, TED, CDD
ED-8.3.4 Coordinate placemaking investments with the City's capital facilities, transportation, parks, utilities, and grant-seeking processes, so public improvements are consistent considerations.	EXD, PRD, TED

Policies and Implementation Actions	Lead
ED-8.4 Advance Tumwater's visitor appeal by improving wayfinding, aesthetics, tourism assets, event activity, and connections among key destinations.	EXD, PRD, CDD
ED-8.4.1 Continue phased implementation of Tumwater's wayfinding system and update signage priorities as districts, trails, cultural assets, and redevelopment areas evolve.	EXD, PRD, CDD, TED
ED-8.4.2 Collaborate with regional tourism partners to promote Tumwater's sports, recreation, nature, heritage, arts, food and beverage, and district-based visitor opportunities.	EXD, PRD, CDD
ED-8.4.3 Support visitor-serving businesses and attractions, including restaurants, cultural and entertainment uses, recreation-related businesses, lodging connections, and event-supportive services in appropriate districts.	EXD, PRD, CDD
ED-8.4.4 Use Old Brewhouse, former brewery sites, Craft District, Deschutes River Valley, sports facilities, City golf course, and other signature assets as anchors for regional destination-building.	EXD, PRD, CDD
ED-8.5 Coordinate actions with the Land Use and Housing Elements to encourage housing, mixed-use activity, and multimodal connections that support vibrant districts and allow more people to live near jobs, services, and amenities.	CDD, EXD, TED
ED-8.5.1 Encourage mixed-use, multifamily, and neighborhood-compatible housing near priority districts, job centers, transit corridors, and community amenities where consistent with the Land Use and Housing Elements.	CDD, EXD, TED
ED-8.5.2 Support affordable and workforce housing opportunities that allow people who work in Tumwater to live near employment, services, and amenities.	CDD, EXD
ED-8.5.3 Promote multimodal access between housing, employment areas, schools, parks, business districts, and visitor destinations to support daily livability and reduce dependence on single-purpose auto trips in coordination with the Transportation Plan.	CDD, EXD, TED

Goal ED-9

Develop an affordability strategy that secures equitable access to Tumwater's future growth for all people by expanding the supply of housing, child care, education, and energy options.

Policies and Implementation Actions	Lead
ED-9.1 In coordination with the Housing Element goals, increase the supply and variety of housing options available to workers, families, seniors, young adults, and cost-burdened households.	CDD, EXD
ED-9.1.1 Evaluate tools such as multifamily tax exemptions, fee deferrals or reductions, surplus/public land partnerships, public-private partnerships, grant funding, and affordable housing funding mechanisms where appropriate and legally available.	CDD, EXD
ED-9.2 Increase access to education, training, and career pathways that expand residents' ability to obtain living-wage employment.	EXD
ED-9.2.1 Coordinate with the Tumwater School District, New Market Skills Center, South Puget Sound Community College, workforce development organizations, employers, and community partners to expand training capacity tied to living-wage jobs and target industries.	EXD
ED-9.2.2 Support the siting, expansion, or co-location of education, training, apprenticeship, and workforce service facilities in locations accessible to residents and employers.	EXD
ED-9.2.3 Use City-supported projects, redevelopment initiatives, and partner agreements to explore local hiring, apprenticeship, internship, and career-exposure opportunities where legally feasible and appropriate.	EXD
ED-9.3 Reduce long-term household and small-business energy cost burdens by expanding access to energy efficiency and clean energy programs, electrification, and resilient infrastructure.	WRS, EXD
ED-9.3.1 Coordinate with utilities and state, regional, nonprofit, and private partners to expand participation in energy efficiency, weatherization, electrification, utility-cost reduction, and resilience programs for households, affordable housing providers, and small businesses.	WRS, EXD
ED-9.3.2 Plan for clean energy, charging, grid-readiness, district-scale energy, and resilience infrastructure where it can lower costs, support redevelopment, and improve access for residents and businesses.	WRS, EXD

Policies and Implementation Actions	Lead
ED-9.4 Identify market conditions that would attract child care and elder care services.	EXD
ED-9.4.1 Coordinate with Thurston Economic Development Council to conduct outreach to relevant non-profits and direct service providers to identify barriers to market.	EXD
ED-9.4.2 Identify best practices by researching strategies and policy outcomes from other jurisdictions.	EXD

CITY OF TUMWATER

Sustainable Growth

City of Tumwater 2025 Comprehensive Plan
Economic Development Element, Part 1