

Appendix A

JBLM 2022 Growth Coordination Plan - Planning Process & Regional Context

1) 2022 JBLM GCP Update Planning Process

This 2022 Growth Coordination Plan Update was prepared by a robust team of consultants under the direction of SSMCP staff and the Steering Committee (see Figure A.1). The process for GCP development was phased according to the Project Approach provided in Figure A.2.

ORGANIZATIONAL CHART

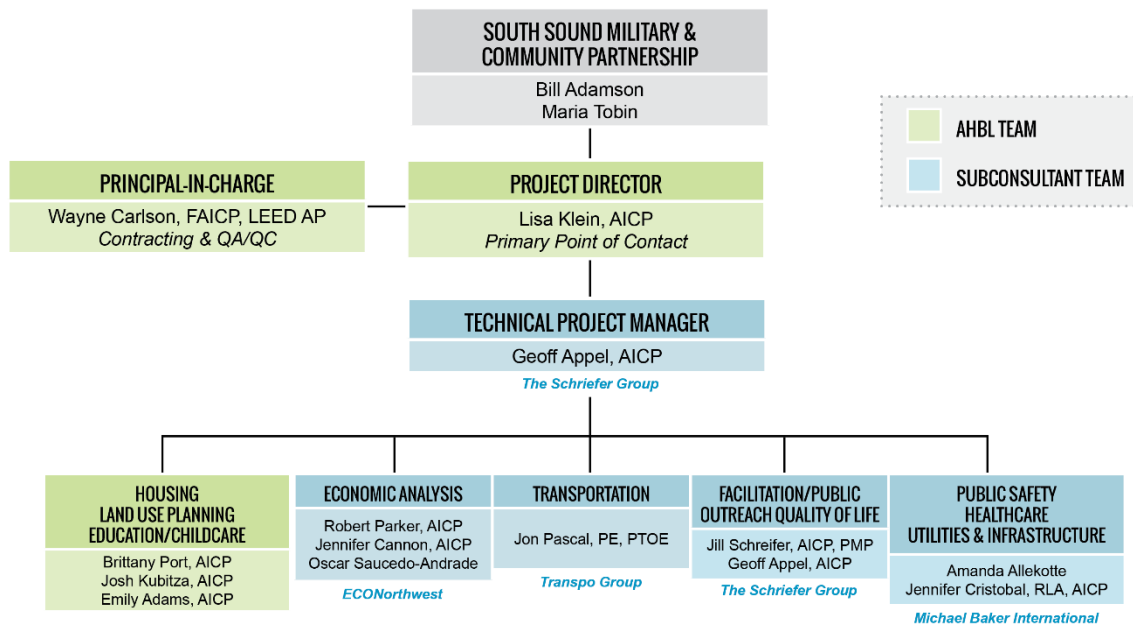


Figure A.1 – JBLM GCP Team Organizational Chart

The first phase of work began with information gathering, data review and assessment, and completion of stakeholder interviews to assess the existing conditions in the study area specific to the following primary resource areas.

- Economics
- Transportation
- Land Use
- Housing
- Education and Child Care
- Social Services
- Health Care
- Public Utilities and Infrastructure
- Public Safety
- Quality of Life

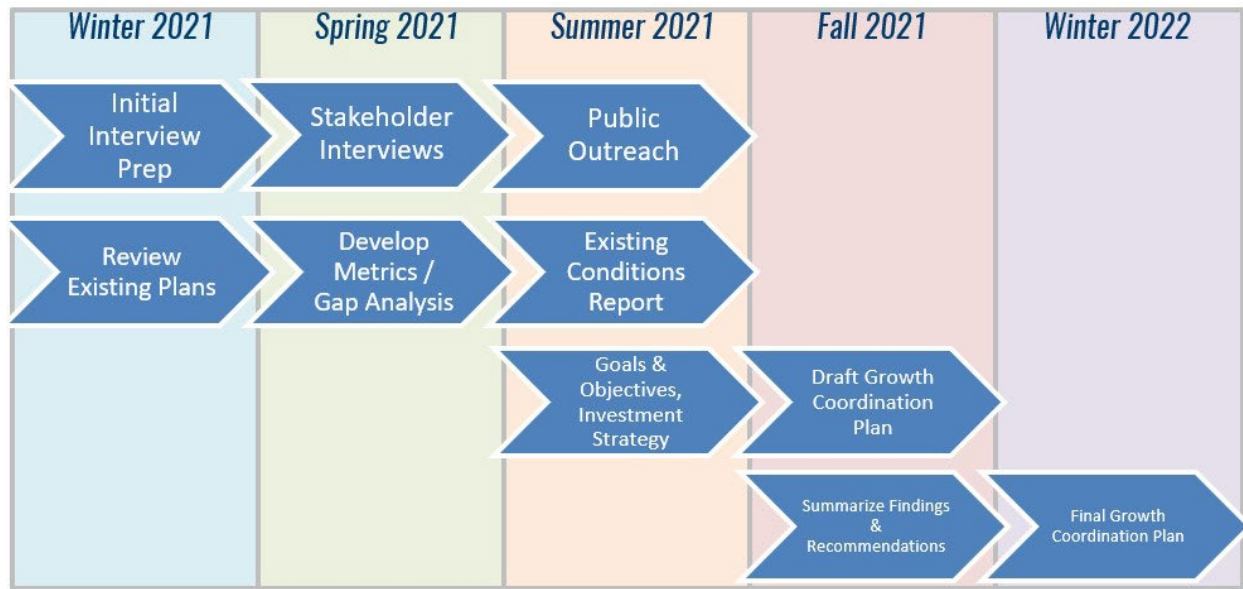


Figure A.2 – JBLM GCP Update Project Approach

A Stakeholder and Public Engagement Plan was implemented to derive additional information about the existing conditions and emerging needs directly from the people living and working in the study area (see Appendix C). The public engagement process, included:

- ✓ 26 Stakeholder Interviews
- ✓ Stakeholder Survey
- ✓ Project Website
- ✓ Public / Virtual Open House
- ✓ Public Survey
- ✓ Working Group Meetings
- ✓ Steering Committee Briefings and Polling

With the results of the data gathering, interviews, and surveys, the consultant team presented to the Steering Committee its findings in the form of an Existing Conditions Summary (Appendix D) and a Needs Assessment (Appendix E). The Existing Conditions Report was the first major deliverable in the 2022 Growth Coordination Plan process. The purpose of the Existing Conditions Report was to document current conditions relating to the ten key resource areas and assess how current conditions have changed since the 2010 Growth Coordination Plan. The Existing Conditions Report identified gaps in the provision of services, infrastructure, or key resources that affect the mission of JBLM and overall quality of life of service members, their families, government or civilian employees and contractors, military retirees, and the public at large within the South Sound region. Through the process a new resource area was identified and assessed: Climate Change. The Existing Conditions Report then provided an assessment of needs resulting from the foregoing analyses.

Following completion of the Existing Conditions Report, a comprehensive list of needs was prepared to address the identified gaps in the provision of services, infrastructure, or key resources. The identified needs were presented to the Steering Committee together with proposed strategies to address them in a ranking exercise to determine which needs and strategies were of the highest priority.

The Needs were then further refined into Strategies with implementation tasks and assigned priority levels, timeframes for completion, and an estimate of the level of effort involved. These strategies will be used by the SSMCP in developing their work plan in the coming years (see Chapter 6).

GCP Study Area

One of the first steps in the GCP Update process was to define the study area. The 2022 JBLM GCP Study Area is comprised of all land and cities within the bounds of Pierce and Thurston Counties (see Figure A.3). The boundaries were selected for this study because Pierce and Thurston Counties experience the most growth impacts from JBLM. While JBLM employment and associated economic impact have a major role in the greater Puget Sound region, they are not felt to the extent that they are locally. Situated at the southern edge of the Puget Sound region, Pierce and Thurston Counties both have growing economies, diverse residents, and employment opportunities covering a broad range of industries.

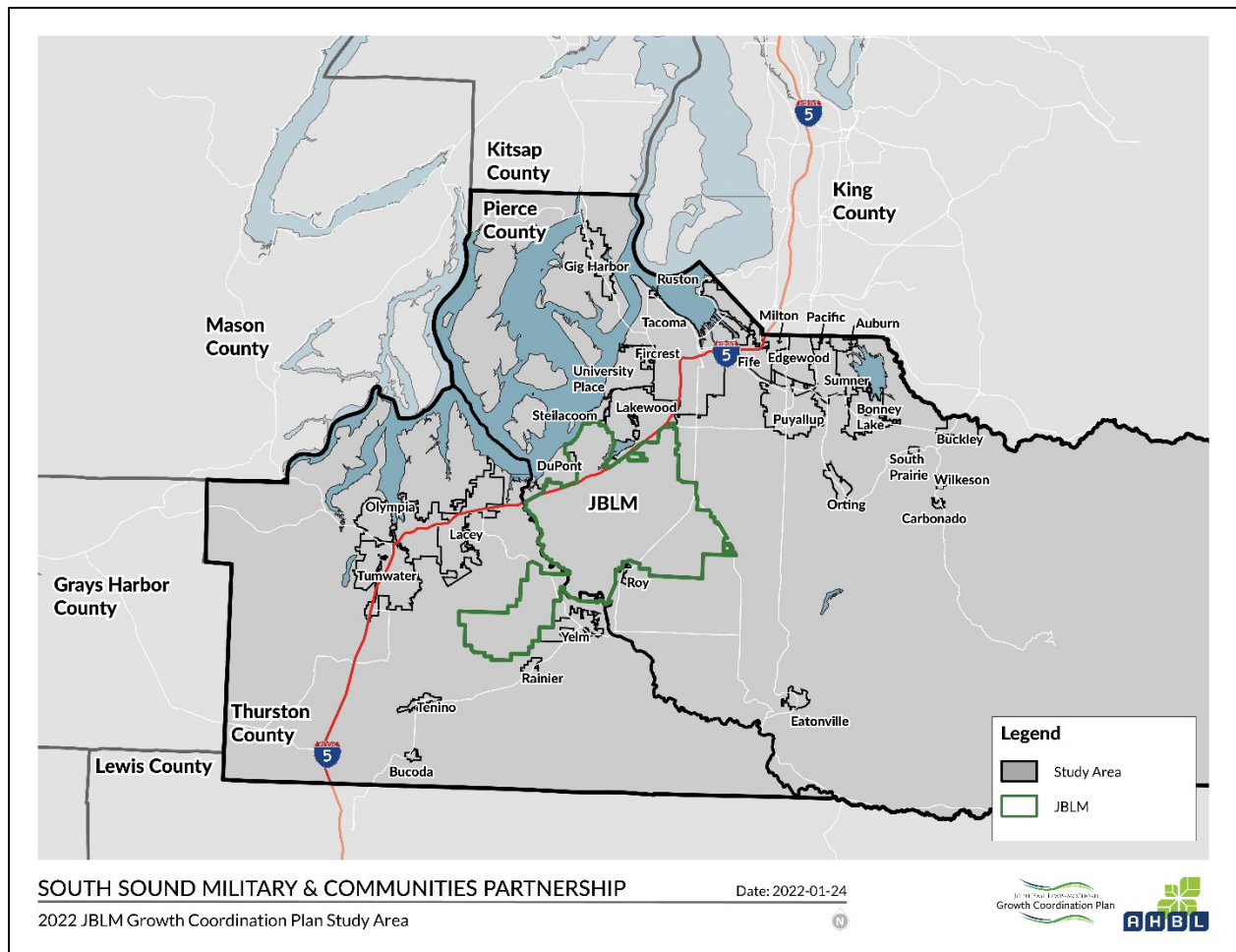


Figure A.3 - 2022 JBLM GCP Study Area

GCP Mission and Goals

Throughout the GCP development process, the SSMCP and consultant team were guided by the following mission statement:

“Develop a long-range action plan that assesses existing conditions, identifies opportunities for improvements, and establishes a framework of implementable and measurable action items that are designed to improve the quality of life in the JBLM region, while balancing military readiness and community interests.”

The team was also guided by a set of established Goals:

1. Leverage the regional clout of the SSMCP membership in lobbying for funding and improvements.
2. Identify public service gaps, including infrastructure, education, public health, and childcare, and recommend measures for closing the gaps.
3. Identify opportunities to enhance economic development opportunities for all sectors and citizens.
4. Identify opportunities to enhance understanding of JBLM economic benefits to the region.
5. Identify opportunities for improving retention of Veterans within our communities.
6. Support our local communities in their efforts to increase the supply of and access to attainable housing.
7. Identify opportunities to improve regional mobility for all modes of travel.
8. Provide implementable and measurable action items with assignments and deadlines.
9. Assess the optimal organizational structure of SSMCP.

2) 2022 JBLM GCP Update Regional Context

Regional Setting

Pierce County

Pierce County is home to JBLM. As of the 2020 Census, the Pierce County population was 921,130,¹ up from 795,225 in 2010,² making it the second-most populous county in Washington, behind King County, and the 61st-most populous in the United States.

Thurston County

Thurston County’s population as of the 2020 census was 294,793³. The county seat and largest city is Olympia, the state capital.

¹ ["QuickFacts - Pierce County, Washington"](#) (Web). United States Census Bureau. Retrieved December 26, 2021.

² ["State & County QuickFacts"](#). (Web) United States Census Bureau. Archived from [the original](#) on June 7, 2011. Retrieved January 7, 2014.

³ ["QuickFacts - Thurston County, Washington"](#) (Web). United States Census Bureau. Retrieved December 26, 2021.

Study Area Demographics and Growth

The following provides a snapshot of the study area demographics and growth trends:

- Pierce County is younger and more diverse than Thurston County and both are growing and becoming more diverse; however, both have a similar share of prime working age adults (ages 25 to 64): slightly over 50 percent. Pierce County tends to be more racially and ethnically diverse than Thurston County and the state, with higher percentages of Black, Native Hawaiian or Pacific Islander, and multiracial individuals. However, Thurston County's composition is changing at a faster rate than Pierce County's.
- Both counties are expected to grow until 2040, with Pierce County forecasted to grow by about 132,545 households and Thurston County forecasted to add about 56,151 households. On an annual average growth basis, Thurston County is forecasted to add households at a more rapid rate than Pierce County, growing at 1.9 percent per year compared to Pierce County's 1.6 percent.
- Median household incomes statewide and in Pierce and Thurston Counties have increased over the 2010 to 2019 period. When adjusted for inflation, household incomes statewide grew by about 20.6 percent. Comparatively, Pierce County households had a similar growth to that of the state at 19.6 percent; however, median household income in Thurston County only grew by 9.8 percent.

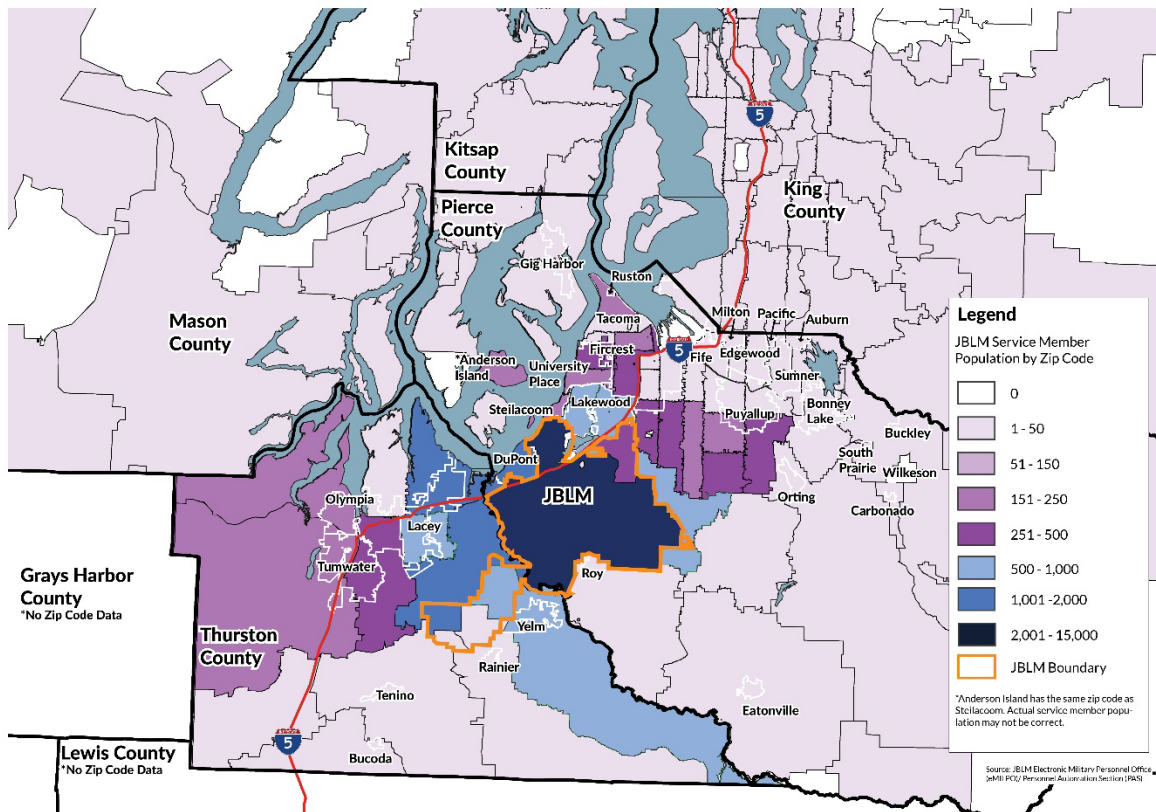
Service Members in the Community

Where service members live in the Study Area has changed over time. In 2010 service members were predominately living close to base, but since then they have shifted their home locations with more moving to the south into Thurston County and the Lacey/Olympia Area, likely due to lower housing costs and general housing availability. Data provided by JBLM for 2021 identified the following communities with the highest JBLM service member population (see Figure A.4, and Table A.1, below). These figures are for service members only and do not include their families:

Table A.1 – Top Locations Where Service Members Live ⁴		
Location	Zip Code	Service Member Population
JBLM	98433, 98438, and 98431	15,262
Lacey and Unincorporated Thurston County	98516	1,513
DuPont	98327	1,332
Lacey and Unincorporated Thurston County	98513	1,034
Thurston County and Yelm	98597	847
Lacey	98503	778
Pierce County (Spanaway/Bethel)	98387	704
Lakewood/Tacoma	98499	680
Lakewood/Tacoma	98498	647
Lakewood/Tacoma/Portion of JBLM	98439	601
Tumwater, Olympia, Thurston County	98501	372
Pierce County	98375	340
Tacoma and Lakewood	98409	340
Pierce County and Tacoma	98444	330
Pierce County and Puyallup	98374	321

⁴ Source: Plans, Analysis, and Integrations Office at Joint Base Lewis-McChord, 2021

Tacoma, University Place, and Fircrest	98466	314
Pierce County and Tacoma	98445	312
Tacoma	98402	305
Pierce County and Steilacoom	98388	241
Pierce County and Puyallup	98373	235
Thurston County, Tumwater, and Olympia	98512	199
Tacoma/Ruston	98407	186
Tacoma	98405	184
JBLM and Pierce County	98502	179
Pierce County	98446	161
University Place and Tacoma	98467	154
Pierce County	98338	144
Tacoma	98406	131
Roy and Pierce County	98580	127
Tacoma	98403	104
Tacoma	98408	102
Tacoma	98404	100



SOUTH SOUND MILITARY & COMMUNITIES PARTNERSHIP

Date: 2022-03-14

2021 JBLM Service Member Population Heat Map by Zip Code



Figure A.4 – 2021 JBLM Service Member Population Heat Map by Zip Code

JBLM Economic Impact to Study Area

JBLM provides economic stability to the region and influences employment levels, sectors, and community trends. JBLM is an anchor institution in the South Sound and the base has a significant impact on community demographics by providing employment, a

JBLM is considered the fourth-largest employer in Washington State and number one employer in Pierce County.

large skilled Veteran workforce, investment in the region, and industry sector growth. In terms of number of jobs, JBLM is considered the fourth-largest employer in Washington State and number one employer in Pierce County. Approximately 529,784 Veterans reside in Washington State (2015-2019 U.S. Census Bureau ACS Survey). Among this total, nearly 13 percent of all adults in Pierce and Thurston Counties have served in the military.

JBLM has a significant economic impact on the entire study area. SSMCP, in partnership with UW-Tacoma Center for Business Analytics, surveyed businesses in 2019 and 2020 and found that 82 percent of the surveyed businesses in Pierce County and 77 percent of the surveyed businesses in Thurston County were attributed to the presence of JBLM. Also, nearly 70 percent of the surveyed businesses in both counties employed Veterans and family members.

JBLM's economic impact is considerable; JBLM has an estimated \$9 billion in salary/wage earnings helping to produce almost \$14 billion in gross output that translated into \$2.25 billion in revenue for federal, state, and local governments. Among this total, Pierce and Thurston Counties generated an estimated \$12.1 billion in total economic impact and over \$2 billion in tax revenue. Key findings from the June 2020 Regional Economic Impact Analysis (REI) completed in partnership with the SSMCP and University of Washington-Tacoma are as follows:

- Approximately 83,587 jobs in Pierce and Thurston counties are attributable to JBLM's presence. Of these jobs, 69 percent are directly employed by the base and the remaining 31 percent are "spin-off" jobs resulting from JBLM's economic activity in the South Sound region.
- The direct jobs at JBLM translates to \$6.9 billion of labor income. For the "spin-off" jobs, JBLM's economic activity translates to roughly \$1.4 billion of labor income.
- About \$1.74 billion in federal taxes is generated by JBLM. Another \$0.39 billion is generated in state and local taxes. These dollars support government function and initiatives.

Other key trends in the region include:

- The number of new jobs climbed upwards over the last decade, but wage growth is stagnant.
- Nearly 14 percent of the state's total business applications were in the study area, increasing by about five percent over the last decade. These findings indicate that both Pierce and Thurston Counties are attractive locations for new businesses as evidenced by the steadily increasing growth.
- The share of Veterans as a percentage of the total adult population decreased by over two percentage points between 2010 and 2019 in the state and both counties. Overall, Veteran employment in Pierce County barely increased (less than one percent), and in Thurston County Veteran employment increased by approximately 4.1 percent between 2010 and 2019.

Military Growth

Over the analysis period of fiscal years 2003 to 2020, JBLM added approximately 10,596 full-time military personnel, which represents a 54 percent expansion. Population fluctuations due to active military personnel deployments returning from war beginning in 2010 continued past 2010 until about 2014. Their return had a variety of impacts on resources including social services, health and medical services, transportation services, and housing needs. At the same time, the count of full-time civilians increased by about 6,304 individuals (76 percent). Since 2003, the overall JBLM Population

increased over time. However, significant expansions halted after reaching a peak in 2013. Since this peak, the total population has remained below 50,000 between 2014 to 2020, resting at around 45,000 in recent years (2017 to 2020). In fact, the overall JBLM population has slightly shrank since 2010. Over the fiscal year 2003 to 2010 period, JBLM added about 14,287 full-time personnel, or an increase of 73.4 percent. Comparatively, the base's full-time personnel count decreased by 3,691 personnel over the 2010 to 2020 period (a contraction of 10.9 percent).

JBLM provided more detailed information on the population associated with the JBLM base for Fiscal Year 2021⁵. Below is a summary of this information.

- As of 2021, there were approximately 54,355 active duty service members, civilians, and contractors supporting JBLM.
- JBLM forecasts its military personnel and civilian population to increase by 2,537 persons by 2026.
- Approximately 31,221 active-duty military members
- Approximately 7,088 reserve military (Reserve Component, National Guard)
- Approximately 11,746 civilian employees
- Approximately 4,300 contractors
- Within 40 miles, there were an estimated total of 46,518 family members for all services
- Within 40 miles, there were an estimated total of 39,608 retirees and 138,406 retirees' family members

Over the period of fiscal year 2021 to 2026, JBLM forecasts its military personnel to increase by 2,323 individuals and its civilian population by 214 individuals (or 2,537 persons in total). This roughly translates to 465 military personnel added to the base per year, and 43 civilians per year.

⁵ Source: Plans, Analysis, and Integrations Office at Joint Base Lewis-McChord, 2021