

V. Economic Development Element

Introduction

Purpose and Intent

The purpose of the Economic Development Element is to provide goals and policies for economic growth and vitality that will enhance the city of Duvall's financial future and quality of life. The Element describes Duvall's role in the local and regional economy, stresses the importance of business retention and growth, and provides a summary of the city's strengths and weaknesses. A city-wide strategy that encourages a balance and diverse mix of light industrial, commercial and residential activities is critical to the success of Duvall's future economic health. It is important to note that economic development not only focuses on the growth of new commercial and industrial business, but also promotes the revitalization and sustainability of existing businesses in Duvall. As the city continues to grow in the years ahead, an economic development plan must be in place to ensure a healthy business climate and develop a strong and competitive local and regional marketplace. The overall goal of this Element is to provide a framework to help improve the economic climate of the entire city.

The Growth Management Act (GMA) requires the Economic Development Element to establish local goals, policies, objectives, and provisions for economic growth and vitality and a high quality of life (RCW 36.70A.070). The element must contain (a) a summary of the local economy such as population, employment, payroll, sectors, businesses, sales, and other information as appropriate; (b) a summary of the strengths and weaknesses of the local economy defined as the commercial and industrial sectors and supporting factors such as land use, transportation, utilities, education, work force, housing, and natural/cultural resources; and (c) an identification of policies, programs, and projects to foster economic growth and development and to address future needs. King County has established Countywide Planning Policies (CWPPs) that shall be addressed by all of the cities in King County. The policies in the Economic Development Element must reflect the CWPPs that are concerned with economic development.

Economic Development Concept

The city of Duvall has evolved from a rural natural resource and timber community into a growing residential community with great economic potential. To ensure a strong and vibrant economic future in Duvall, the Economic Development Element stresses these critical strategies:

- Focus on making Duvall a great place to live, work, recreate and visit;
- Promote a thriving and diverse local economy that provides opportunities in a variety of business sectors;
- Encourage city-wide economic growth while enhancing the Old Town business district;
- Maintain the small-town atmosphere that Duvall is known for that builds on local historic and natural assets within the community;
- Encourage high-quality, mixed-use, commercial and industrial development;
- Create a balanced economic environment that will attract business growth while strengthening existing local businesses, and;
- Foster the development of partnerships between private and public sectors to implement economic development goals and strategies.

Economic Conditions Summary

In October 2002, ECONorthwest (ECO), under sub-contract from MAKERS, was hired to perform an economic analysis to supplement Duvall's City-Wide Visioning Plan and the Downtown Sub-Area Plan. ECO's Economic Conditions report outlined the state of the Duvall economy in the context of local economic conditions and the regional economy. The regional context provides a foundation for understanding of the broader forces that influence Duvall's future, which is dependent on local actions,

connections to the region as a whole and economic relationships with nearby sub-regions.

Economic Conditions Summary 2005 Update

In December 2005, the City adopted the Economic Development Strategic Action Plan (EDSAP): 2006-2011 (Action Plan), which was prepared by Berk and Associates. The plan is incorporated as **Appendix X**. The plan is built upon the understanding that the City's economy is intrinsically tied to its livability and quality of life, as well as the identity it presents to others, be they potential tourists, residents or employers. The plan provides direction and prioritization for the City and its partners in economic development for the coming five years. The plan is based on the understanding of the interrelationships between the City's economy, quality of life and image, and is guided by the following principles:

- Enhance Duvall's attractiveness as a great place to do business, live and visit
- Draw on Duvall's culture and heritage, respecting the City's rural character as a key asset. At the same time, embrace and proactively plan for change
- Support a family-friendly environment. Consider the large presence of families when considering residential and commercial development, infrastructure investments, community events and other actions
- Target investment and efforts in enhancements which benefit and are attractive to both City residents and out-of-town visitors
- Tie investments in public infrastructure to economic development and future goals
- Leverage resources through collaboration among the City, community groups and community volunteers. Form "tiger teams" to address key areas of interest, bringing together City and community resources and ideas. Consider teams dedicated to:
 1. Old Town
 2. Recreation
 3. Business retention
 4. Recruitment of targeted businesses and industries.

The plan draws on substantial amounts of quantitative and qualitative research that includes:

- A comprehensive analysis of the City's demographic, economic, market and land use conditions contained in the Economic Development Profile
- A Fiscal Implications of Land Use Alternatives captures the impacts of different land use choices on the City's financial position
- Summaries of phone and in-person interviews with more than 30 stakeholders and the City's Cultural Planning Steering Committee present important context and community opinions
- Additional public input was gained at the public open house held in September of 2005.

Using newer employment forecasts for the region, this plan made several conclusions with regard to the market factors shaping the City of Duvall's economy. Due to several disadvantages having to do with location and accessibility, the Action Plan concluded that the City faces competition from neighboring cities which are better positioned to attract major office, industrial, and distribution employers. On the other hand, the Plan concluded that Duvall has many strengths, including its relative housing affordability, skilled labor force, and pleasant small town character. The Action Plan made the following recommendations:

1. Encourage larger-scale commercial and mixed use development in the southern portion of town.
2. Continuing to focus efforts on making the City an excellent place to live and accommodating household growth are among the better strategies for encouraging office, retail, and industrial growth in the long run.
3. Converting a significant portion of the vacant land currently zoned commercial and industrial to allow residential uses would not deter commercial and industrial development opportunities.

Duvall's Commercial and Industrial Development Market Factors

The plan identified Duvall's strengths and challenges in the market place. Strengths include:

- Duvall is growing rapidly and is expected to grow much more rapidly now that the city is not in a moratorium
- The City's image of a pleasant small town accessible to Redmond, Seattle and other urban areas in the region is a positive image that will attract attention
- Duvall is well known for its relative housing affordability and a good place to raise a family.
- The City's labor force is skilled with many connections to Microsoft
- The local development community is aware of opportunities in Duvall and generally appears ready to respond.

Challenges include:

- Duvall's Moratorium has turned away the regional development community from 1999-2005
- Stiff competition surrounds Duvall: Redmond Ridge and Snoqualmie Ridge expansions have the attention of regional developers. Monroe's and Woodinville's economies are expanding and attraction development as well
- Duvall's location within the Highway 202 and 203 corridor is challenging for major office and industrial activity:
 1. Nearly all industrial businesses require movement of equipment or large volumes of product
 2. Distribution networks and access to regional transportation facilities becomes the primary consideration for industrial location
 3. Distribution activities best suited for Duvall would be revolved around companies that primarily serve other businesses and households within the north-south corridor spanning from Monroe to Snoqualmie/North Bend
 4. Other cities rank higher for access to the major transportation facilities and commercial centers to the west within the Puget Sound region
 5. Similar challenges to those cited above apply to firms who desire access to large labor pools. Other areas located near major regional transportation facilities will rank higher in terms of access to labor.

Conclusions and other considerations for retail/office and commercial include:

Retail

- The City's aggregate retail sales lag far behind the revenue retailers would otherwise generate if they simply sold the equivalent of what their resident households purchase.
- The reasons for the retail shortfalls are well known locally: the City's residents primarily work in other parts of the region; shopping opportunities are abundant around all of their workplaces and driving to retail centers in Woodinville, Monroe, Issaquah Redmond, and even Bellevue and Seattle is too convenient for local retailers to compete for local dollars.
- Commercial growth in Redmond Ridge and Monroe is sure to challenge local retail development further, as well as unforeseen development that may come to Woodinville, Snoqualmie or other centers.
- Still an increasing market share in Duvall should be within local retailers reach with effective strategies and good developments. An absorption target rate of 150,000 s.f to 200,000 s.f. over a 20-year period appears reasonable for planning purposes. Achieving those targets will require increasing market share for local retailers.
- The City's retail environment appears to have reached a plateau. Retailers and developers seem to be waiting for a tipping point in population growth to be reached, at which point they will more comfortably risk new development to capture local spending.
- Accommodating more housing growth, in general is among the more effective strategies the City can implement to attract more retail development in the long-run.

Office and Industrial

- As the City grows, more office and industrial space will be in demand.
- Puget Sound Regional Council (PSRC) employment forecasts for the region suggest regional trends alone will not drive demand.
- The source of demand for office and industrial space is most likely to come from local entrepreneurs or local residents moving their business to be close to home.

- The City's comparative advantages do not appear to favor relocating an existing or growing office or industrial business to the City; growing employment centers surrounding the City offer better access to the regions key transportation facilities- a key determinant for intraregional location decisions.
- These factors suggest that continuing to focus efforts on making the City an excellent place to live and to accommodate household growth are among the better strategies for encouraging office and industrial growth in the long run.

Based on the retail, industrial and office conclusions the City's land capacity can more than accommodate the absorption scenarios and projections listed in the Duvall Economic Development Profile. The analysis concludes that within a 20 year horizon, converting a significant portion of the vacant land currently zoned commercial and industrial to allow residential uses would not deter commercial or industrial development opportunities. Moreover allowing additional households nearer to retailers would provide support for local retailers and incrementally strengthen the local economy.

Development Market Factors

In addition to the analysis of the City's economic and market conditions, the plan provides a qualitative assessment of market factors in the City's developable areas, with a particular focus on the areas zoned for commercial, industrial or mixed-use.

Old Town

Infill and redevelopment, with retail, services, housing, and civic uses, including open spaces, are the prime objectives of Old Town, as captured by the Downtown Sub-Area Plan. Currently demand is low from retailers and commercial businesses for space in Old Town. Old Town appears to have ample in-fill and redevelopment opportunities. Much of the land is not used as intensely as possible. Surface parking lots and aging buildings provide plenty of land for land owner, developers, and the City to work with to accommodate denser development in Old Town, which in turn would lead to a more thriving downtown Duvall.

Old Town has much potential for residential development. The hillside, the riverfront and the pedestrian-friendly design of the center provide key components attractive to housing development. Additional amenities, such as a park and playground, river access and better developed community spaces would help attract housing to Old Town.

Southern Portion of Town

The Safeway- anchored development has established a major presence that will affect the types of tenants and development in the vicinity. Retail clustering thrives on anchors, and grocery stores are among the most typical anchors or retail concentrations.

A new retail center adjacent to Safeway might represent the City's most favorable chance to increase trade capture of the City's total retail activity. The Safeway's regional draw, provides customers that other retailers could attract. Retailers near Safeway would benefit from the visibility to Safeway's customers. Adding more retail and services to the immediate vicinity could provide synergies, there by further increasing the local draw.

Multi-family housing in the southern portion of town can help support local businesses. In Duvall's conditions, retailer's benefit from the addition of new housing, particularly higher-end housing. This suggests owner-occupied multi-family units would serve retail in the vicinity best but renter-occupied housing could be a plus to retail sales, housing affordability and provide needed housing for the Lake Washington Technical College's Satellite Campus.

Office space should also fit nicely as part of an absorption strategy for mixed-use development along the SR-203 corridor or in the southern portion of town. Housing, retail and office can all work together to support each other and draw local residents.

Industrial

The southern portion of town can accommodate a mix of industrial and flex-tech space. The greatest visible demand for industrial uses in Duvall appears to be smaller spaces that can flexibly accommodate

light assembly and production space for business which also might need retail frontage and parking, and or office space for management or customer service. This type of flexible industrial space would work well along the Main Street Corridor, as well.

Main Street Corridor

With established centers in Old Town and at the Safeway Development, the land for development in between will take on a corridor activity pattern. The City could prosper with developments like Copperhill Square along the Main Street Corridor. Copperhill Square represents an improvement over typical strip-commercial centers. The housing above and behind the commercial development, with access to the center, will create opportunities for high-quality tenants and access to services.

A larger, stand alone office building would fit along the Corridor or in the southern portion of town. From a market perspective, developers would choose the vacant, larger parcels, to have more flexibility in planning for access and parking. The plan also states the corridor could accommodate a mix of industrial flex-tech, and business park space.

In summary the plan uses newer employment forecasts for the region, and several conclusions can be made with regard to the market factors shaping the City of Duvall’s economy. Due to several disadvantages having to do with location and accessibility, the Action Plan concluded that the City faces competition from neighboring cities which are better positioned to attract major office, industrial, and distribution employers. On the other hand, the Plan concluded that Duvall has many strengths, including its relative housing affordability, skilled labor force, and pleasant small town character. The Action Plan made the following recommendations:

4. Encourage larger-scale (larger parcels with integrated design and development) commercial and mixed use development in the southern portion of town.
5. Continuing to focus efforts on making the City an excellent place to live and accommodating household growth are among the better strategies for encouraging office, retail, and industrial growth in the long run.
6. Converting a significant portion of the vacant land currently zoned commercial and industrial to allow residential uses would not deter commercial and industrial development opportunities.

Current Conditions

In order to understand local conditions and build a foundation for the 2022 Vision, ECO reviewed the current state of the Duvall economy. The following is a summary of current economic conditions in Duvall . .

Population

Between 2000 and 2006 Duvall’s population has grown rapidly (6.1%24.2%) compared to growth in King (1.3%5.6%) and Snohomish (2.4%10.8%) counties and in comparison to most nearby communities. Duvall has grown in population at roughly five times the rate of population growth in King County and roughly three times the rate of Snohomish County. The more rapid growthsignificant growth of nearby Monroe (9.8%17.2%) suggests that Monroe might be attracting growth that might otherwise be destined for Duvall. Other nearby Ccities are not growing as rapidly as Duvall with the exception of Snoqualmie (379.1%), which is experiencing explosive growth. Table ED – 1: Population Growth of Duvall and Nearby CitiesPopulation Change of Duvall and Neighboring Cities: 2000-2006, provides a summary of these growth rates.

**Table ED – 1
Population Change of Duvall and Neighboring Cities: 2000-2006**

	2000 Population	2006 Population	Percent Change
Duvall	4,616	5,735	24.2%
Carnation	1,893	1,900	0.4%
Monroe	13,795	16,170	17.2%
North Bend	4,746	4,690	-1.2%
Snoqualmie	1,631	7,815	379.1%
Woodinville	9,809	10,350	5.5%
King County	1,737,046	1,835,300	5.6%

Snohomish County	606,024	671,800	10.8%
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Source: Office of Financial Management, 2006

Household Incomes

Median household incomes in Duvall are higher than the regional averages. For the city of Duvall, the median household income in 2000 was \$71,300. This compares to median incomes of slightly more than \$53,000 for King County. The Duvall figure suggests that the purchasing power of consumers living in the immediate vicinity of the city exceeds that of the county and region as a whole.

**Table ED – 2
Household Income**

	DUVALL		KING COUNTY	
	\$	Total Households	\$	Total Households
Median Household Income	71,300	1,608	53,157	711,235

Source: 2000 U.S. Census, 2003 King County Growth Report

Employment and Industry Trends

Since 1995, overall economic activity has increased in Duvall. Between 1995 and 2000, the Retail and Construction/ Resources sectors showed the strongest growth among the seven major employment sectors, followed by Education; Finance, Insurance, Real Estate, and Services (FIRES); and Government (Figure ED – 1). By contrast, the industrial sectors of Manufacturing and Wholesale Trade, Communications, and Utilities (*WTCU*) saw no growth as a group, with declines in Manufacturing employment offsetting modest growth in *WTCU*.

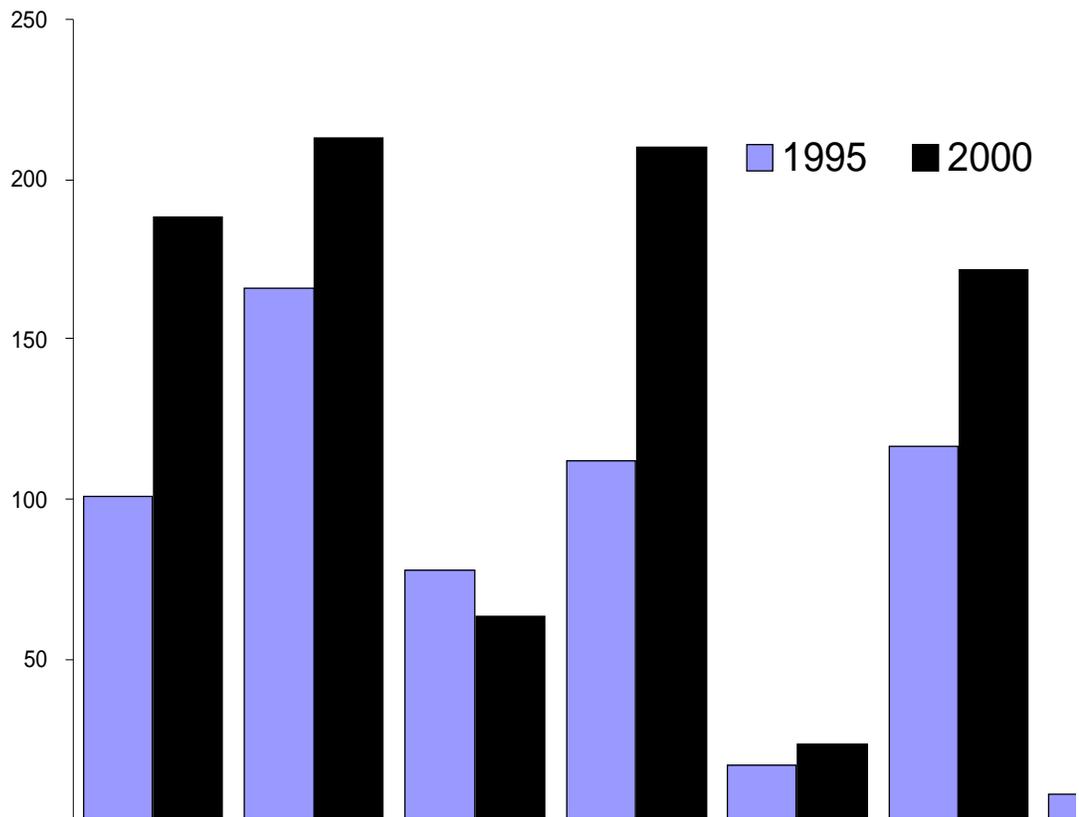
Location quotients highlight the city’s strengths and weaknesses in economic sectors (Figure ED – 2). A value of 1.0 indicates that for a specified sector, employment within the city is what should be expected given Duvall’s size and the regional averages in the central Puget Sound Region. Changes in Duvall’s location quotients from 1995 to 2000 suggest that the city is becoming less of a place where products are built and services are rendered. It is developing into a community where people live, raise families, and shop.

The 2005 Economic Development Strategic Action Plan states that Duvall’s job-housing balance is 0.5 – lower than the totals for incorporated King County (1.6) and for incorporated portions of the region (1.5). This means that in Duvall there are more homes than jobs.

The majority of Duvall’s residents are employed outside of the Duvall area. The largest share of Duvall residents work on the Eastside (36%). The jobs to housing ratio, journey to work data, and Duvall’s location northeast of the Eastside have created a role for Duvall as a bedroom community.

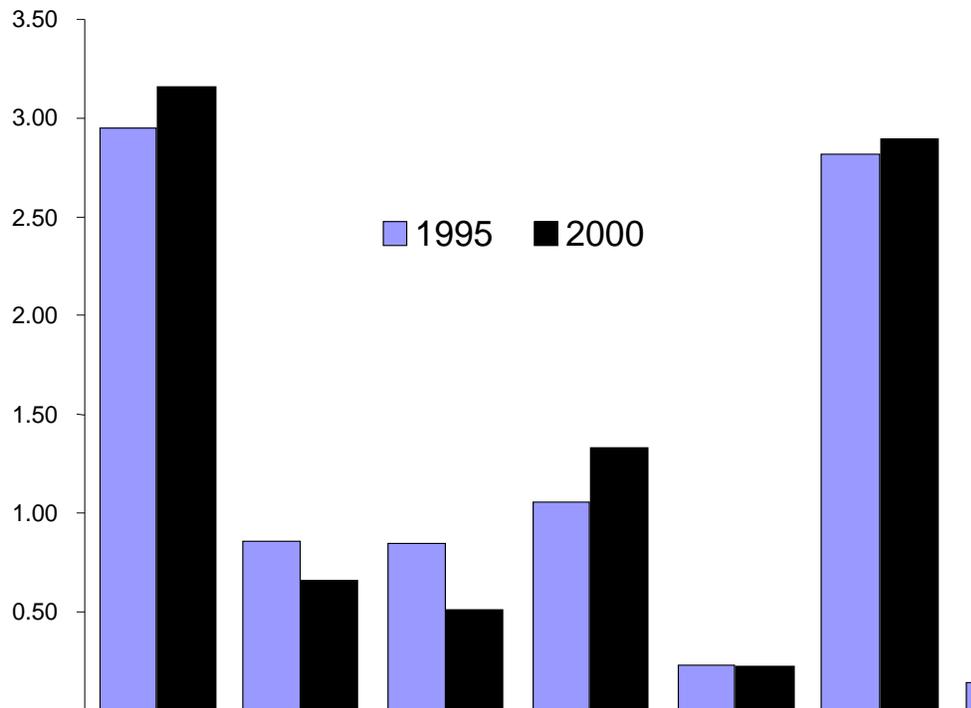
Nearly half of Duvall’s workforce commutes from the Duvall area (44%). Smaller concentrations of Duvall workers commute from the Woodinville and Redmond area.

**Figure ED –1
1995 and 2000 City of Duvall Covered Employment**



Source: ECONorthwest analysis of Puget Sound Regional Council summaries of covered employment for 1995 and 2000.

Figure ED – 2
1995 and 2000 Location Quotients for City of Duvall



Source: ECONorthwest analysis of Puget Sound Regional Council summaries of covered employment for 1995

and 2000. Note: Location quotients are based on total employment in King, Snohomish, Pierce and Kitsap counties.

The Puget Sound Regional Council (PSRC) employment forecasts (Table ED-3) show a constant growth of 0.9% for Duvall through the year 2030. Manufacturing is forecasted to decline in Duvall while all other sectors will see increases through 2030. The forecasts suggest very rapid increases in finance, insurance, real estate and services (FIRES) for the Snoqualmie Valley. Much of this growth in the FIRES sector is forecasted to occur in the City of Snoqualmie, but Duvall is expected to capture a share of this growth.

**Table ED -3
PSRC Employment Forecasts for Duvall and the Snoqualmie Valley, 2000-2030**

	Duvall (FAZ 6605)				Snoqualmie Valley FAZs			
	2000	2010	2020	2030	2000	2010	2020	2030
Total Employment								
Construction/Resources	690	756	825	903	2,449	4,122	4,430	4,866
Manufacturing	131	100	88	85	547	410	339	315
WTCU	44	44	56	62	405	342	420	474
Retail	236	238	235	242	2,099	2,333	2,640	3,107
FIRES	290	382	485	581	2,527	7,103	7,578	8,199
Government and Education	319	354	355	365	1,879	2,365	2,512	2,724
Total	1,710	1,874	2,044	2,238	9,906	16,675	17,919	19,685
10-Year Growth		164	169	194		6,769	1,243	1,767
Avg. Annual Growth Rate		0.9%	0.9%	0.9%		5.3%	0.7%	0.9%

Source: Puget Sound Regional Council, 2005

Note: WTCU is Wholesale, Trade, Transportation, Communication, and Utilities; FIRES is Finance, Insurance, Real Estate, Services; FAZs is forecast analysis zones

Many light-industrial and manufacturing companies perceive a lack of industrially zoned land in the region. Some smaller cities in the Puget Sound region have capitalized on this issue by annexing large portions of land and zoning the land industrial. Cities that are favorably located with access to major highway routes have attracted a number of warehousing and distribution companies. Due to its location and less than ideal access to major regional centers and transportation corridors, Duvall is not in a competitive position to attract larger industrial and distribution employers. To compensate for the lack of industrially zoned land within Duvall, the City will be designating a majority of the South Urban Growth Area as commercial and/or light industrial. Special consideration should be given to ensure adequate land reserved for light industrial uses to encourage additional flex-tech space as is provided for in the commercial zoned area of the South UGA.

Of all the location quotients shown in Figure ED – 2 above, the most disconcerting is the decline in the services (FIRES) sector. Both nationally and regionally, this sector includes the fastest growing industries. Employment in the service sector grew during the late 1990s, adding 50 jobs to the more than 220 jobs already located in this sector. Service jobs represent the largest sector of employment in Duvall, while business services represent the most underserved among the sub-sectors within the Services category. Duvall's services employment is less than two-thirds what would be expected given its total employment, and therefore is cause for further exploration. As shown in Table ED-3, Duvall can expect to see steady growth in the FIRES sector, which includes service jobs.

The employment data shows that the city is an education hub for many people living outside the city. Schools in Duvall draw students and parents to the city, and this routine traffic represents potential customers for Duvall businesses. Attracting a regional educational institution such as Lake Washington Technical College would expand this sector further while also having a multiplier effect on local retail trade and services.

Currently, nNew retail leases generally being signed in the range from \$1.00 to \$2.75 per square foot, per month. However, retail market factors vary by location. Discussions with market participants suggest that the Old Town area has many vacancies. Asking prices for retail space in Old Town range considerably, but average between \$1.00 and \$1.25 per square foot, per month. Properties south of Old Town toward the Safeway Development prices are around \$2.75 per square foot, per month. Demand was very low in late 2002 with building managers reporting some interest at that time, but at prices well below the asking price.

Market participants suggest that Duvall is experiencing a strong demand for small Industrial/Flex-Space facilities similar to the city's one existing location, known as the Tech Center. Asking prices for office space in Duvall generally range between \$14 and \$22 per square foot, per year (\$1.15 and \$1.80 per month). This is generally below the asking price of Class A and B office space in the Bothell/Woodinville area, the closest comparable concentration of competitive office space.

Market Outlook

The majority of employees in Duvall work in retail, education and finance, insurance, real estate, and services (FIRES), of which the largest percentage is employed by retail services, closely followed by FIRES. These jobs, as well as jobs in education and government, typically are lower paying jobs. King County Countywide Planning Policies estimate the 2001 - 2022 employment target for Duvall at 1,125 jobs and the household target at 1,037 units. This equates to 1.08 jobs per household. While this number is average among other rural cities, it is far lower than nearby cities such as Redmond and Bellevue. This is due not only to the population size, but also to the lack of diversity and number of employment opportunities that can be found in Duvall and other smaller neighboring communities. Duvall's residential growth rate currently surpasses economic growth, and will continue to do so until the employment base within the city is expanded. Table ED – 3 4 summarizes the job and household target for Duvall.

New economic data from the Economic Development Strategic Plan discusses Duvall's jobs-housing balance. According to of Office of Financial Management Duvall in 2003 had 1,080 jobs and 1,990 housing units for .5 jobs per household.

Table ED - 34
2022 Jobs and Housing Targets and Jobs/Housing Ratio

	JOB TARGET	HOUSEHOLD TARGET	JOBS/HOUSING RATIO
Duvall	1,125	1,037	1.08
Rural KC Cities	5,250	5,563	.94

Source: GMPC Amendments to the Countywide Planning Policies – July 2002

Most of Duvall's job growth will come in Service (FIRES) industries. Over time, Duvall's population base and labor force will attract start-ups and smaller companies in the information based and service based industries. The growing population base of Duvall and surrounding areas will continue to attract construction employment to Duvall.

Economic Development Opportunities

Old Town

The Old Town neighborhood, which is located along Main Street between NE Bird Street on the north to NE Stephens Street on the south, has a historic charm and a lot of potential in the years ahead. This corridor consists of small shops and food establishments, which serve both the local population and out-of-town visitors.

In recent years during the economic recession, Old Town has struggled to retain its core retail uses. Some of the long time shops have not seen the same level of business as in years past. Some of the issues which trouble economic vitality in Old Town are:

- Constant traffic noise disrupting pedestrian vitality along Main Street
- New commercial developments on south side of Duvall which compete for business
- Pedestrian safety issues (wide right-of-way, limited crosswalks, etc.)
- Minimal parking along Main Street, especially on weekends
- Lack of public gathering space (civic plaza) which encourages pedestrian activity
- Lack of residential uses above retail (uses which encourage pedestrian activity)

Old Town can provide convenient opportunities for residents and visitors to interact and allow Duvall the opportunity to retain the historic small town charm. In order to retain and attract successful local businesses in Old Town, improvements should be made in the areas listed above. The City should explore options for obtaining funds to make pedestrian, road and parking improvements. Implementing zoning for residential uses above retail will encourage increased pedestrian traffic. Encouraging business owners to be actively involved in the local Chamber of Commerce can improve business climate and allow for collaboration between business owners. Last, by implementing design guidelines and targeting unique business opportunities, the city can provide a unique, attractive, and safe atmosphere where people will want to gather, walk and enjoy the Old Town area.

Many of Duvall's long-time businesses in and adjacent to Old Town are still thriving, while others are struggling because of the recent recession and new competition which has opened up in the southern Downtown area. In addition, the lack of a significant employment center has likely slowed some business growth. The potential growth in new housing units along the Main Street corridor will bring much needed economic growth in the city. As outlined in the Transportation Element, Main Street will be developed at 44 feet in width from the edge of the sidewalk. This includes on street parallel parking on both sides of the street and one travel lane in each direction. This corridor improvement project will provide a safe and attractive environment for pedestrians, which will encourage business growth and retention. There are also several properties which have the potential for new development or redevelopment along Main Street. With these changes to the existing landscape, this corridor has the potential to attract a number of residents and visitors.

Downtown - South of Old Town

The Downtown area south of Old Town consists of three distinct areas; 1) the commercial development adjacent to Old Town on the south; 2) the mixed-use and industrial development clustered at Main Street and 145th Street, and 3) the Safeway Plaza development at the southern city limits.

In the first area, there are a variety of businesses ranging from service industry (restaurants, grocery, bakery), retail businesses (hardware, auto parts) and medical offices (chiropractic, dentistry). Design characteristics include single story strip-like development to mixed-use development with office space on upper floors. Sidewalks exist in the majority of the area. There are vacant lands and redevelopment opportunities in this area.

In the second area, there is a new mixed-use development, Copper Hill Square, with retail uses on the bottom floor and office or residential uses on upper floors in the part of the development that fronts on Main Street. Condominiums are located in the eastern portion of the property and adjacent to NE 145th Street and 1st Avenue. This area also houses the Tech Center, a flex space building owned by the City. A primary industrial use, Pentz Design, and the Public Works Department and Sewer Treatment Plant are also located in this area. The majority of Main Street south of Valley Street through this area has no sidewalks or crosswalks, which limits the amount of pedestrian traffic due to safety concerns. There are vacant lands and redevelopment opportunities in this area as well.

The third area is the Safeway Plaza location. Safeway Plaza consists of a Safeway store, three multi-tenant buildings, a gas station, and a bank. There are substantial amounts of vacant land in the area. With the economic success in Safeway Plaza, it is evident that the population base within Duvall and surrounding communities will support additional retail and services. These businesses may include fast-food restaurants, auto repair services, franchise restaurants and businesses and personal care businesses. It is also important to work to provide opportunities for local businesses, rather than depend on national chain stores in order to ensure Duvall retains its unique character. Additionally, if and when the office market in the Puget Sound region rebounds, the properties adjacent to the Safeway Plaza allow for the potential of expanding Duvall's employment base.

South UGA

The South UGA, which is approximately 100 acres of vacant or underutilized acres land is located from south of NE 144th Place NE 143rd Place, to NE Big Rock Road and from 268th Avenue NE/3rd Avenue to approximately 275th Avenue NE to the south between 3rd Avenue and 272nd Avenue NE, This is the largest potential annexation area within the 20-year planning period (except for the East Urban Growth Area Reserve) and will be dedicated to Commercial/Retail, Residential and Light-Industrial/flex-tech type uses.

As indicated in the City-Wide Visioning Plan, residents identified the South UGA as a new light industrial and office corridor. Since then, economic analyses conducted for the Economic Development Strategic Action Plan have revealed that Duvall is not well positioned to attract major light industrial or office-type employers from outside of the City. Nonetheless, this area has the potential for creating a number of jobs, ranging from small firm or institutional office jobs to start-up light industrial companies in information-based and service-oriented based industries. The Economic Development Strategic Action Plan emphasized that allowing flexibility in the range of uses is an important factor for developing the South UGA into both an employment center as well as a neighborhood.

Designation of Commercial Land in the South UGA

Many of the economic forces shaping Duvall’s economy are beyond the government’s control, thus the city government must be poised to respond to trends while it encourages local business generation. The South UGA is an ideal area for developing a mixed-use center where commercial, residential and institutional uses mutually support one another and the larger Duvall economy. A Commercial designation will allow for retail sales, flex-tech, live-work units, and other flexible spaces that encourage entrepreneurial, locally-based businesses, a key factor in stimulating Duvall’s economy. Many of the uses that would otherwise be allowed under a Light Industrial designation could also be allowed under a Commercial designation provided they are compatible with other uses such as residential and institutional uses.

As part of the City-Wide Visioning Plan, the ECONorthwest report indicates that the city is currently under-served by retail, given the population of Duvall and the typical spending pattern assumptions for residents.

Duvall’s capture rate of retail sales as identified in the Economic Development Strategic Action Plan in 2004 was approximately 19%. The City has set a goal capture rate of 25%. Table ED-5 shows office and industrial absorption rates.

Table ED - 5
Office and Industrial Absorption Scenarios

	PSRC Forecasts	Current Share Scenario	Rapid Growth Scenario	Build Out Scenario
<u>New Development Over 20 years (s.f.)</u>				
Total area by Development Type				
Retail	150,000	150,000	150,000	150,000
Office	34,500	123,200	262,500	400,000
Industrial	32,100	174,500	450,000	650,000
Total New Development	216,600	447,700	862,500	1,200,000
<u>Acres Absorbed over 20 years</u>				
Acres of land absorbed by				
Retail	10	10	10	10
Office	2	8	17	26
Industrial	2	11	30	43
Total New Development	14	29	57	79
<u>Excess Vacant and Redevelopable Land (acres)</u>				
Available land in excess of 20-year demand (acres, net)	65	49	22	0
Available land in excess Of 20-year demand (acres, gross)	92	71	32	0

Source: Berk and Associates

The employment forecasts presented in the plan, along with the jobs per square foot assumed, provide context for absorption projections. Four absorption scenarios are presented in Table ED – 5 along with the associated employment forecast context are defined as:

- The “PSRC Forecasts” Scenario reference the latest PSRC forecasts that show Duvall receiving 98 office using jobs and 43 industrial-using jobs, representing a combined total of 0.9% increase per year, or 4% of the Valleys employment growth assumed to be destined for offices or industrial space.
- The “Current Share Scenario” assumes that Duvall employment growth will grow at the same rate as the Snoqualmie Valley as a whole, and that the City’s share of the Valley’s future office and industrial employment will be the same as current. The scenario assumes that all of the job growth will be accommodated in new development on lands currently vacant. This scenario includes 352 office jobs. and 233 industrial jobs and assumes office and industrial jobs growing by 3.9% and 2.1% per year respectively or 2.9% combined.
- The “Rapid Growth Scenario” assumes Duvall office and industrial jobs would grow at roughly the same rate of such jobs for 1995-2003. The scenario assumes job growth of 6.5% of office-using

employment and 4.3% of industrial-using employment for a combined employment growth of 5.2% per year. This scenario would show Duvall receiving 31% of the Valley's office jobs and 50% of the valley's industrial jobs.

- The "Build-Out Scenario" assumes that all of the development will be absorbed within 20 years. The scenario shows a total of 79 acres absorbed by 2025, with 26 acres dedicated to office use and 43 acres devoted to industrial and 10 acres for retail uses.

The City has completed further analysis of Duvall's Net Developable Land since the Economic Development Strategic Action Plan was completed in 2005 based on new projects, future projects and some new assumptions that did not exist in the 2004 Comprehensive Plan Update.

**Table ED - 6
Duvall Net Developable Land, 2006**

			Acres
Mixed Use (All within city limits)			46.16
Less: Projected Residential Absorption (80%)			<u>(36.93)</u>
Mixed-Use Available for Commercial Uses (A)			9.23
Commercially Zone Land			13.98
Within City Limits			<u>46.24</u>
Beyond City Limits			60.22
Total Gross Land Available for Commercial (A+B)	69.45		69.45
Less: Developable Land Discount Factor	(20%) 13.89	(30%)	20.84
Net Developable Land (Acres)	55.56		<u>48.61</u>
Net Developable Land (s.f.)	2,420,194		2,117,452
35% Floor Area Ratio	<u>847,068</u>		741,108
Commercial in Process (s.f.)	<u>110,009</u>		<u>110,009</u>
Total Commercial Potential (s.f.)	957,077		851,117

The above data assumes the Washington Holding property is zoned MU12

With increased growth in the trade area (from north of the King/Snohomish County line to just south of Carnation's City limits) of Duvall, business growth will lead to higher capture rates (shoppers spending money within Duvall), thus the need for more retail square footage. As a result of this scenario, it is believed that a reasonable amount of land should be allocated for retail and commercial growth. The South UGA, as a mixed use area, could potentially contain significant amounts of commercial uses in addition to residential and institutional uses.

Additionally, the need for additional "flex-tech" space is evident due to low vacancy rates in the city's existing Tech Center located along Main Street. With a public/private partnership, a new flex-tech center could operate as an incubator for new entrepreneurial businesses. In order for this area the South UGA to develop into a successful employment mixed-use district, however, the City must invest in a number of some infrastructure improvements will need to occur. These include improvements to roads, pedestrian, water and sewer facilities. Access plays an important role in the development of new commercial and employment centers. It is critical that the necessary improvements are made so that businesses will be attracted to this newly developed area. Since the South UGA properties abut residential zones to the north and east, and include residential in the mix of allowed uses, special consideration should be made for design guidelines and buffers so that impacts to adjoining residential neighborhoods are minimal. The Transportation Element highlights conceptual road improvements within the South UGA.

Vacant and Redevelopable Commercial Lands

Access plays an important role in the development of new commercial and employment centers, especially light-industrial facilities. It is critical that the necessary improvements are made so that businesses will be attracted to this newly developed area. Since the South UGA properties abut residential zones to the north and east, special consideration should be made for design guidelines and buffers so that impacts to adjoining residential neighborhoods are minimal.

Table ED – 4 5 below indicates the amount of land where opportunities for new mixed-use, commercial, and industrial institutional growth development may occur. The South UGA has considerable amounts of land (36.6 acres) for such purposes.

Vacant and Redevelopable Lands

According to the 1994 Comprehensive Plan, there were 44.27 gross acres of mixed-use, 26.83 gross acres of commercial and 15.13 gross acres of industrial land.

**Table ED –5
Potential Vacant and Redevelopable Commercial Lands**

Area/Type	Vacant (gross acres)	Redevelopable (gross acres)
Old Town (Mixed-use)	3.43	5.89
South of Old Town (Mixed-use)	2.46	16.92
South of Old Town (Commercial)	33.97	7.85
South of Old Town (Employment)	5.31	13.25
South UGA (Commercial)	16.24	-
South Multi-Family UGA (Commercial)	16.24	
South UGA (Commercial/Commercial/Light-Industrial/Mixed-use/Institutional)	61.2336.6*	-
TOTAL	122.6481.77	43.91

Planning Department

Source: City of Duval.

* Mixed use may include any combination of commercial office/retail, and residential

Conclusions

Once the City’s expanded sewer treatment plant is operational in 2005, Duvall should expect sustained population and employment growth, accelerating the demand for both commercial and residential land, now that its expanded sewage treatment plant is operational. In the long run, the growing population base will support increased retail activity. Demand for an additional 88150,000 square feet of retail space by 2020 is forecasted (Table ED – 5) under the build-out scenario.

**Table ED – 56
Forecasted New Retail Floor Area Demand for 2010 and 2020**

Category	New Floor Area by 2010	New Floor Area by 2020
Building Materials, Hardware	9,830	18,000
General Merchandise Stores	640	1,000
Food	17,050	31,000
Auto Dealers/Gas Stations	N/A	N/A
Apparel/Accessories	520	1,000
Furniture/Furnishings/Equipment	3,880	7,000
Eating/Drinking Places	7,440	13,000
Miscellaneous Retail Stores	10,120	17,000
TOTAL	49,480	88,000

Source: ECONorthwest Report for City-Wide Visioning Plan, 2002

NOTE: Forecasts assume that the City of Duvall will maintain its 2001 market position in all retail categories, average annual real household income increases of 2.1%, and average annual increases in sales per square foot of floor area of 1.25%.

With auto access improvements, the area around Safeway will attract the same mix of business found around dozens of grocery-anchored commercial centers in the region: fast-food restaurants, auto-repair service, franchise restaurants and personal services stores. The retail demand forecasts could support development of all of the existing retail land around Safeway, absorb the current vacancies in the two newer developments, and still leave vacancies in the Old Town area. If Old Town is to be successful as a retail area, it will mean that Duvall must become successful at attracting a larger share of local retail dollars. As the South UGA develops into a mixed use neighborhood with residential, commercial and institutional uses, additional demand for commercial office and retail development will also be generated.

In the short run, the regional office market is depressed and presents challenges for office development in Duvall. In the long run, demand for office space and light-industrial/flex-tech space should remain strong. Continued growth in the service sector and residential sector will also drive demand for office space in Duvall.

Duvall needs to increase its tax revenue to stay solvent and to fund strategies for attracting businesses. For most cities, the three most important sources of revenues are (1) retail sales taxes, (2) property taxes, and (3) utility taxes. For a city like Duvall, which levies utility taxes at a rate of 6%, virtually all types of commercial land uses are likely to be *net generators* of revenue. The City is also considering capturing additional tax dollars from commercial development through a business and occupation tax (B&O). A city's fiscal health is maintained via a four-tiered tax base (rated 1, least valuable through 4, most valuable):

1. The residential housing base;
2. Non-sales tax industries like manufacturing, warehousing, and other light industrial uses;
3. General, convenience-oriented retail uses; and
4. Destination-oriented retail uses that capture big-ticket and discretionary retail purchases.

According to the ECONorthwest report, Duvall should focus on four categories of economic activity:

1. Personal services and retail to serve its existing and growing population base;
2. Intra-regional tourist based retail and attractions;
3. Entrepreneurial activity; and
4. Business services to sustain a local economy;

Other retail and employment opportunities include:

1. Safeway – development of surrounding area
2. Old Town/Riverfront – revitalize existing businesses and encourage new growth
3. Development of South Urban Growth Area (UGA)

The Economic Development Strategic Action Plan adopted in 2005 reiterated many of the ECONorthwest report findings and added the following:

1. Encourage larger-scale (large parcels with an integrated design) commercial, flex-tech, and mixed use development in the southern portion of town.
2. Continuing to focus efforts on making the City an excellent place to live and accommodating household growth are among the better strategies for encouraging office, retail, and industrial growth in the long run.
3. Converting a significant portion of the vacant land currently zoned commercial and industrial to allow residential uses would not deter commercial and industrial development opportunities.

In order to evaluate economic conditions from year to year, it is suggested that an appropriate reporting method be developed. In collaboration with the Chamber of Commerce or other local economic group, it is recommended that the City tabulate performance measures, such as:

- Jobs created/retained/lost
- Businesses created/retained/lost
- Tax revenues

By investing in economic development, the City and cooperating agencies should make a concerted effort of reporting economic growth on an annual or bi-annual basis. By doing so, the City can monitor whether economic progress is being made and whether realistic goals are being achieved.

Designation of Commercial Land in the South UGA

Currently, Duvall has a limited amount of commercial and light industrial-zoned land, most of which is either located on the Main Street/NE 143rd Place corridor or in the southwest corridor (Safeway Plaza area). Upon the completion of the new sewer treatment plant and the lifting of the building moratorium in late 2005, the demand for commercial (retail and office) and industrial and office spaces will increase. In order to accommodate the forecasted space for these uses, the City needs to designate additional land for commercial and light industrial uses.

As part of the City-Wide Visioning Plan, the ECONorthwest report indicates that Duvall should support planning for more land than necessary to accommodate the retail space forecasts of 88,000 square feet. According to the report, retail sales data show that the city is currently under-served by retail, given the population of Duvall and the typical spending pattern assumptions of residents.

With the implementation of the Vision Plan and with sound land use planning decisions, the report states that the city will see an increase in business growth and attract new businesses. With increased growth in the trade area of Duvall, business growth will lead to higher capture rates (shoppers spending money within Duvall), thus the need for more retail square footage. As a result of this scenario, it is believed that a reasonable amount of land should be allocated for retail and commercial growth. Therefore, the South UGA shall be identified as commercial and light industrial. Special consideration should be given, however, to ensure adequate land reserved for light industrial uses to encourage additional flex-tech space.

Goals and Policies

Duvall is in a position to become an attractive, vibrant community with a strong local economy. Although many economic trends are beyond the City's control, the City can work to attract and retain residents and businesses through policies that promote economic development and a high quality of life.

The Economic Development goals and policies are statements that reflect the goals and objectives of the community. These goals and policies frame the development of economic strategies and incorporate regional and state mandates into the Comprehensive Plan. Goals and policies for the Economic Development Element are based primarily on the City-Wide Visioning Plan and the Downtown Sub-Area Plan.

Goal ED – 1 Establish an economic climate that fosters business creation and retention and helps to maintain a reliable and consistent tax base for the city.

Policies

- ED – 1.1 Establish and support incentives to encourage economic development, such as a business improvement district, tax increment financing or other incentives.
- ED – 1.2 Consider implementing new zoning and development regulations that encourage business diversity.
- ED – 1.3 Encourage a broad range of business opportunities that provide goods and services to Duvall residents, business owners, and surrounding residents.
- ED – 1.4 Support entrepreneurial businesses that are compatible with neighborhood character.
- ED – 1.5 Provide an efficient and economical streamlined permitting process by utilizing a hearing examiner for land-use decisions and considering other options for streamlining the permit process.
- ED – 1.6 Throughout the city, work to encourage the development of small, locally-owned businesses that employ and provide services to Duvall residents.
- ED – 1.7 Encourage the development of intra-regional tourist based retail and attractions.
- ED – 1.8 Create a process to review new commercial development to assess whether economic development is occurring as planned. Performance measures could include jobs and businesses created/retained/lost and changes in tax revenues.

Goal ED – 2 The City should foster collaborative partnerships with community and economic development groups, such as the Chamber of Commerce, to coordinate desired economic goals.

Policies

- ED – 2.1 Support economic development goals and policies through public/private partnerships and community stakeholder groups.
- ED – 2.2 The City should collaborate with or hire a consultant to develop a strategic economic development program for the city.
- ED – 2.3 Encourage economic development groups, such as the Chamber of Commerce, to coordinate business recruitment, marketing and tourism in Duvall.

ED – 2.4 Consider organizing an economic development task force which involves residents, business owners and other stakeholders who have an interest developing economic strategies for the city.

ED – 2.5 Implement a business development and recruitment plan.

ED – 2.6 Explore the creation of an economic development grant program for local businesses, including a façade grant program.

Goal ED – 3 Encourage the revitalization of Old Town as the cultural, historical and economic center of Duvall.

Policies

ED – 3.1 Support Old Town merchants, property owners, the Chamber of Commerce and other groups to develop economic development strategies to revitalize the downtown corridor.

ED – 3.2 Seek public and private investments to support Old Town’s revitalization efforts that will provide improvements to appearance and public amenities.

ED – 3.3 Use natural amenities, such as McCormick Park and the Snoqualmie Valley Trail, as focal points to develop strategies that encourage the renewal of Old Town.

ED – 3.4 Develop downtown design guidelines to create a unified streetscape plan, including street lighting, sidewalks and landscaping.

ED – 3.5 Develop an architectural design plan for Old Town’s Main Street corridor consistent with the City-Wide Visioning and Downtown Sub-Area plans.

ED – 3.6 Continue to support community events that bring together local residents and out-of-town visitors to Old Town.

ED – 3.7 Work with the banking community to locate a freestanding ATM terminal or a bank facility in Old Town.

ED – 3.8 Work with Old Town business and property owners to evaluate the desirability of creating a Main Street business association.

ED – 3.9 Use innovative options for enhancing Old Town’s aesthetic qualities through City investment, redevelopment incentives, tax credits, grants, loans or other options.

Goal ED – 4 Strengthen existing commercial areas and encourage the development of new mixed-use employment and light-industrial type areas to promote jobs and business activity.

Policies

ED – 4.1 Provide flexible standards that enable businesses to expand, grow or redevelop at existing locations.

ED – 4.2 Promote light industrial and office development the development of a mixed-use neighborhood consisting of commercial, residential, flex –tech, office and institutional uses in the South UGA, once annexed into the city.

ED – 4.3 Promote the growth of high-tech, industrial type uses, small scale manufacturing and tourism jobs which pay livable wages.

- ED – 4.4 Allow existing industrial or manufacturing developments to continue and make investments in their businesses until such time as market forces lead to commercial or mixed-use redevelopment.
- ED – 4.5 Support private reinvestment in local shopping centers and businesses to revitalize commercial centers.
- ED – 4.6 Support local small business development by encouraging the development of flex-tech and incubator spaces, working with local banking community to establish favorable loan programs, and streamlining the permitting process.
- ED – 4.7 Actively promote the City’s natural, cultural, artistic and agricultural assets through unified marketing, signage, and other activities.
- ED – 4.6 Support the development of “flex-tech” space incubators for new businesses.
- ED – 4.8 Consider implementing special design standards for industrial/flex-tech structures to provide economic incentives that will promote lower square footage costs to start up and relocating businesses.

Goal ED – 5 Recognize that the surrounding natural environment is one of Duvall’s most important assets in promoting economic vitality.

Policies

- ED – 5.1 Ensure the protection of Duvall’s natural environment when considering land use decisions.
- ED – 5.2 Promote development that minimizes impervious surfaces, retains or creates buffers and links to city trails and open spaces, and enhances the character of the community.
- ED – 5.3 Provide linkages between Duvall’s business districts and the natural areas, such as McCormick Park and the Snoqualmie Valley Trail.
- ED – 5.4 Continue to encourage building and site design of good aesthetic value that complements the natural environment and maintains an attractive and vibrant business community.

Goal ED – 6 Explore ways to provide variety of employment and educational training opportunities.

Policies

- ED – 6.1 Support educational and training opportunities for residents to maintain a skilled workforce.
- ED – 6.2 Cooperate with local schools, the Chamber of Commerce and other organizations to provide educational opportunities for citizens of all ages within the community.
- ED – 6.3 Support workforce training efforts by Lake Washington Technical College and in local schools.
- ED – 6.34 Support development of a regional education facility, in the city, such as a Lake Washington Technical College satellite campus, through collaborative public/private agreements.

Explore the feasibility of providing satellite educational services from regional community colleges or vocational institutions.

- ED – 6.45 Support a community mentoring program, potentially organized by the Chamber of Commerce or other community organization, which provides training, resources, networking opportunities and expertise to employees and small business owners.
- ED – 6.56 Encourage ride-share programs to allow Duvall residents to carpool to educational and workforce training institutions.
- ED – 6.7 Allow the development of flexible-use commercial spaces buildings in the South UGA and other mixed use areas within the city that may be used for a variety of commercial/light industrial businesses including retail, cottage industries, and local start-ups.

Goal ED – 7 Support regional economic strategies and coordinate with other cities and agencies to enhance economic growth and development.

Policies

- ED – 7.1 Collaborate with neighboring cities and agencies to develop economic strategies that promote diversification of business and industry throughout the region.
- ED – 7.2 Coordinate with other jurisdictions to identify infrastructure deficiencies and plan for needed improvements to allow for regional economic growth.
- ED – 7.3 Collaborate with other Valley cities to boost the sub-region’s tourism draw through unified marketing, signage, and other activities.

The following goals and policies are from the Economic Development Strategic Action Plan: 2006-2011. The policies are further detailed in the plan on pages 6-21.

Goal ED – 8Maximize the Potential of Duvall’s Character and Quality of Life.

Policies

- ED – 8.1**Establish a “Duvall Cultural Corridor”.
- ED -8.2 Support Old Town as the heart of the community.
- ED – 8.3Improve motorized and non-motorized transportation infrastructure.
- ED - 8.4Continue to enhance Duvall’s high quality of life, making Duvall a great place to live.
- Ed – 8.5 Support a cohesive community identity while recognizing and enhancing neighborhood identity.

Goal ED – 9 Promote the Vitality of Duvall’s Existing Businesses.

Policies

- ED – 9.1** Increase the trade capture of Duvall’s retailers.
- ED – 9.2 Promote business retention and expansion.

ED – 9.3 Ensure is Duvall an attractive place for customers to shop and for businesses to operate: enhance Duvall’s business climate.

Goal ED – 10 Implement an Active Business Development and Recruitment Plan

Policies

ED – 10.1 Proactively recruit target businesses or industries.

ED – 10.2 Support entrepreneurship and new business development.

ED – 10.3 Encourage larger-scale commercial and mixed use development in the southern portion of town.

ED – 10.4 Develop a vibrant Main Street Corridor.

Goal ED – 11 Guide Future Residential Development to Provide Long-Term Benefits for the City.

Policies

ED - 11.1 Ensure residential development is in desired locations and of desirable quality.

ED – 11.2 Recruit and support the development of workforce housing.

Goal ED – 12 Maximize the City’s Potential as an Interregional Tourism Destination.

Policies

ED - 12.1 Use visitor maps, directories and attractive signage to identify points of interest.

ED – 12.2 Actively promote the City’s natural, cultural, artistic and agricultural assets.

ED – 12.3 Promote usage of the City’s trails.

ED – 12.4 Recruit overnight lodging options.

ED – 12.5 Collaborate with other Valley cities to boost the sub-region’s tourism draw through unified marketing, signage, and other activities.

Goal ED -13 Coordinate Economic Development Planning/Administration and Enhanced Communication

Policies

ED – 13.1 Dedicate City resources to economic development planning and implementation.

ED – 13.2 Create a unique and meaningful City identity.

ED – 13.3 Develop a proactive marketing strategy identifying key audiences and messages.

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