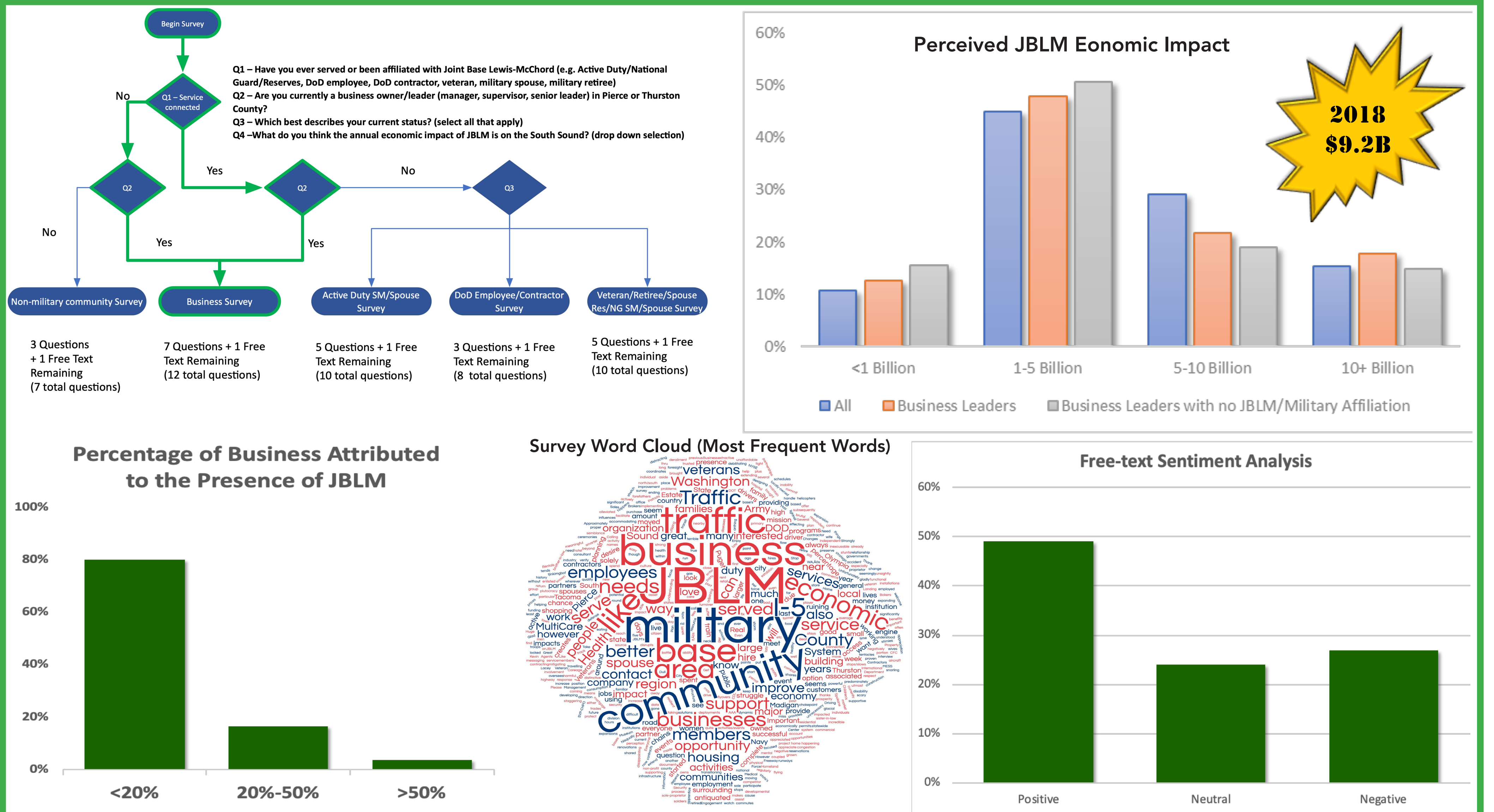




Joint Base Lewis-McChord Economic Impact Analysis Phase 2

PROJECT BACKGROUND: JBLM is the #2 employer in the state and #1 employer in Pierce County. Economics informs and often drives policy. SSMCP believes that local, state and federal policymakers underestimate the economic impact JBLM has in the South Sound and the state of Washington. The lack of detailed economic impact data represents a significant knowledge gap worthy of further study.

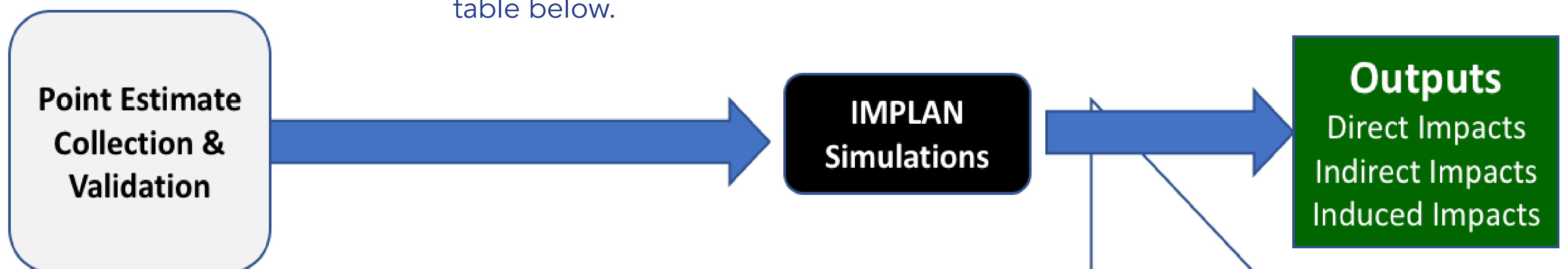
PROJECT GOAL: South Sound Military Communities Partnership (SSMCP) identified two primary goals for the MSBA project team 1) Design, build and deploy an online survey to identify the military connected customer bases of local businesses and the effects of JBLM on the local economy and 2) Expand on the work of the previous Economic impact analysis and incorporate factors such as military retirees, spin-off jobs and cross-region interactions not available during the previous analysis.



Regional Economic Impact Analysis Outline in addition to survey collecting first hand data:

REGIONAL ECONOMIC IMPACT ANALYSIS METHODS AND RESULTS:

- After the survey, we began collecting and validating the data to build our point estimates. The data we collected included: Tuition Assistance point estimate from JBLM Career Skills Program and Stone Education Center and GI bill estimation, etc.
- We sent our collected final data for IMPLAN Simulations to get direct, indirect and induced impacts on a state-wide level and Pierce and Thurston counties level.
- The right column of the grey Point Estimates boxes represents new data that the previous analysis did not have access to like retiree pensions or had to estimate such as off-base housing.
- From the simulation generated point estimate results, we can see that It's a little under 2 billion dollars in difference in the data from last years' analysis and that the economic impact analysis can be summed up in four numbers at each level in the green Outputs table below.



Data Sources	Point Estimates	IMPLAN Simulations	Outputs															
JBLM Garrison Command	JBLM Payroll (Military, Civilian, Contractor) \$4,120,359,073	Military Retiree Pensions \$1,269,087,336	<table border="1"> <thead> <tr> <th>Impact</th> <th>Washington State</th> <th>Pierce/Thurston County</th> </tr> </thead> <tbody> <tr> <td>FTEs(Jobs)</td> <td>92,128</td> <td>83,587</td> </tr> <tr> <td>Wages/Salary</td> <td>\$8.83B</td> <td>\$8.27B</td> </tr> <tr> <td>Gross (Total)</td> <td>\$13.9B</td> <td>\$12.1B</td> </tr> <tr> <td>Tax Revenue</td> <td>\$2.36B</td> <td>\$2.12B</td> </tr> </tbody> </table>	Impact	Washington State	Pierce/Thurston County	FTEs(Jobs)	92,128	83,587	Wages/Salary	\$8.83B	\$8.27B	Gross (Total)	\$13.9B	\$12.1B	Tax Revenue	\$2.36B	\$2.12B
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Madigan Army Medical Center	FY19 JBLM Operating Budget (O&M) \$529,722,995	Active Duty Military Employed Spouses \$285,373,658																
JBLM Child & Youth Services (CYS)	FY19 Madigan AMC Budget (DHP) \$635,500,000	Impact Aid Funding \$27,327,110																
SSMCP	Purchased Care Healthcare \$55,383,820	GI Bill/Tuition Assistance Spending \$148,792,241																
WA Dept of Veterans Affairs	Local Contracts \$994,901,989	Off-base housing for AD SM Families (BAH) \$607,896,036																
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JBLM Career Skills Program (CSP)																		
Stone Education Center																		