A ROADMAP FOR EXPANDING WASHINGTON'S CULTURE OF OPPORTUNITY TO INDIVIDUALS, FAMILIES, EMPLOYERS, AND COMMUNITIES IN EVERY CORNER OF THE STATE.

opportunity washington

PRIORITIES FOR SHARED PROSPERITY

www.opportunitywa.org

2017

Introduction

In 2014, the Opportunity Washington coalition traveled across our state, asking employers and community leaders about what issues mattered most to them and how we could work collectively to expand a culture of opportunity to every corner of Washington state. That feedback, supplemented by state and national economic data and policy analysis, led to the development of a shared agenda focused in three areas: educational quality and outcomes (ACHIEVE), transportation reliability and efficiency (CONNECT), and economic vitality (EMPLOY). Working with lawmakers and civic partners, we have used this information to advocate for public policies that promote opportunity. In the last two years, Washington has made encouraging progress—from adoption of the Early Start Act and a multi-billion dollar investment in public K-12 education to a $16 billion state multi-modal transportation investment.

	Signs of Progress
ACHIEVE	• Adoption of the Early Start Act • Multi-billion dollar state investment in basic education • Launch of the charter school sector • Increased funding for high-demand postsecondary programs • Tuition reduction at two- and four-year colleges and universities
CONNECT	• Passage of the 2015 Connecting Washington investment package, including $1.3 billion for preservation and maintenance, $8.8 billion for project construction, and $1 billion for the state's multi-modal fund
EMPLOY	• Preservation of the four-year balanced budget requirement • Increased education funding within available revenues • Commitment to tax policies that encourage private sector investment

Our state continues to experience robust growth, led by strong anchor industries and a culture of entrepreneurism and innovation. But, like much of America, prosperity in Washington is concentrated in urban areas. At the end of 2016, the unemployment rate in metropolitan Seattle was 3.7 percent,[1] and 62 construction cranes punctuated Seattle's skyline, more than any other city in the country.[2] However, many of our rural counties and communities outside the metropolitan Puget Sound region continued to struggle with high unemployment and stagnant economies. In December 2016, the unemployment rate was 8 percent or higher in one-third of Washington's counties.

As a coalition, we believe that expanding opportunity and shared prosperity to all corners of Washington is essential. That expansion depends on smart public policy and strategic investments.

In this update to the 2015 Opportunity Washington Foundation Report, we revisit our three priorities—ACHIEVE, CONNECT, and EMPLOY—to review progress and chart a path that will benefit all of Washington, including those regions and residents that have continued to struggle in the recovery.

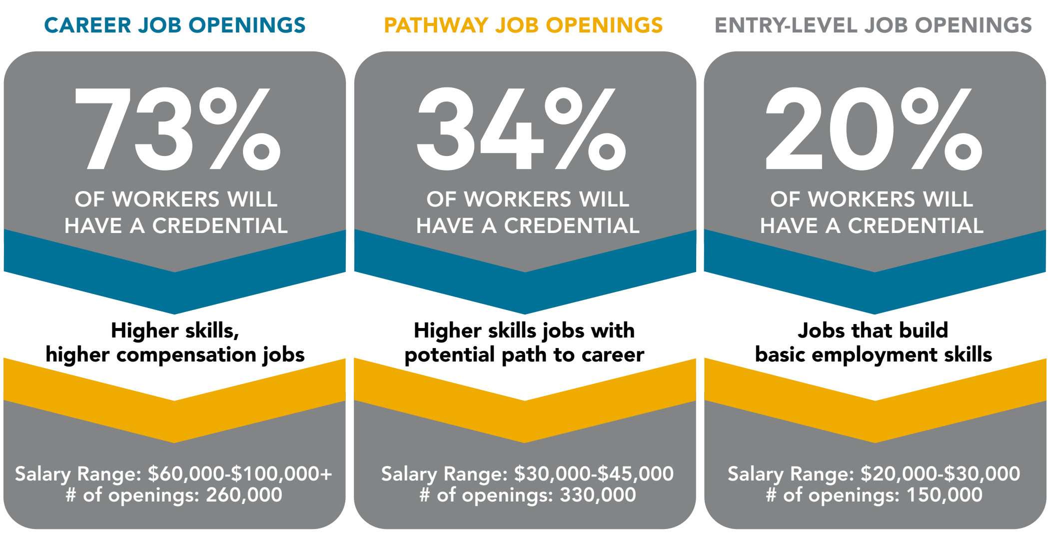
GUIDING PRIORITY I: ACHIEVE

Goal: Provide a high-caliber education and workforce development system geared to the demands of the 21st Century.

- **Expand access to postsecondary education that boosts career opportunity and supports economic growth.**
- **Drive interest and performance in STEM (Science, Technology, Engineering, and Math).**
- **Ensure students graduate from high school career- and college-ready.**
- **Focus early learning assistance on children most at risk of entering kindergarten unprepared.**

Washington is a state rich in innovation and entrepreneurial spirit. That mentality combined with strong anchor industries—aerospace, agriculture, manufacturing, maritime, and technology, among others—has helped to foster one of the nation's leading state economies. For 2016, Washington ranked 5th highest among the states in private sector job growth (2.9 percent).[3] Moving forward, the challenge is to build upon this success and ensure our residents are prepared for the opportunities that such growth presents.

The Boston Consulting Group (BCG) and Washington Roundtable estimate that there will be 740,000 job openings in Washington in the next five years.[4] Job growth here is expected to exceed the state historical growth rate and be nearly three times the national average. BCG classifies these openings into three categories based on median income and opportunity for upward mobility—Career Jobs, Pathway Jobs, and Entry-Level Jobs.



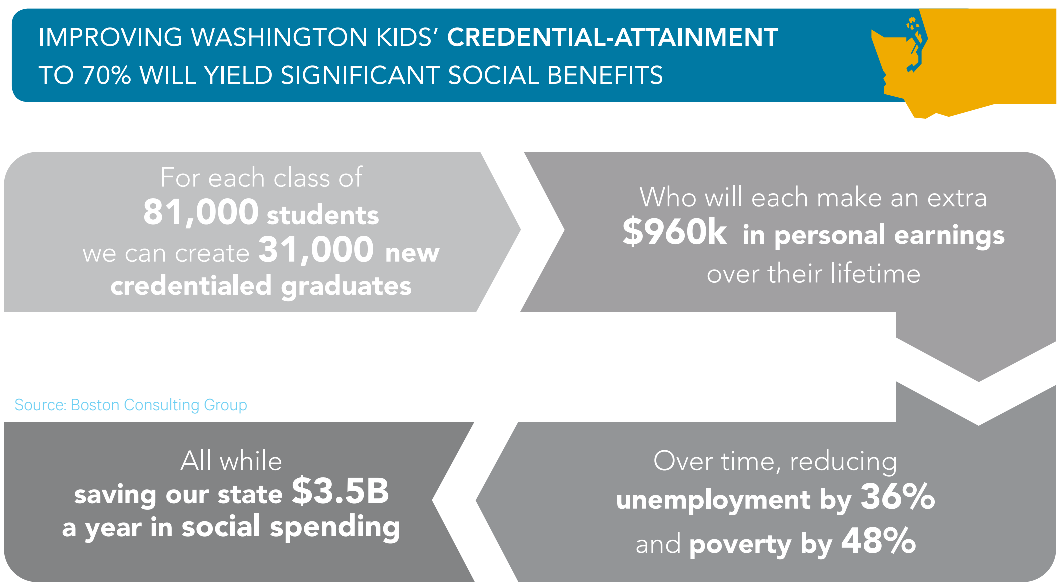
Increasingly, the majority of jobs in Washington will be filled by workers with a postsecondary credential (such as a technical or industry certificate, apprenticeship, or degree). Today, just 31 percent of Washington high school students go on to attain such a credential by the age of 26. The mismatch between workforce readiness and job openings hampers our collective ability to take advantage of the potential economic growth that lies ahead.[5]

Preparing more Washington kids for Washington jobs requires a cradle-to-career approach to raising student achievement. The Washington Roundtable has set an ambitious goal: By 2030, 70 percent of Washington high school students will go on to attain a postsecondary credential by age 26. Opportunity Washington supports such a vision, and the priorities outlined in our 2015 foundation report continue to be essential.

Priority: Expand access to postsecondary education that boosts career opportunity and supports economic growth.

Postsecondary education pays off for individuals. In 2015, median annual earnings for a full-time worker with a bachelor's degree were 66 percent higher than those of a worker with only a high school diploma.[6]

The implications of increasing postsecondary attainment for society are also dramatic. BCG estimates that in a typical high school cohort of 81,000 students, 70 percent postsecondary attainment means 31,000 more students will earn a credential each year. Each will earn nearly $1 million more over his or her lifetime. Collectively, their success will reduce unemployment by a third and poverty by nearly half, saving our state billions of dollars a year in social spending.[7]



Given the clear benefits of postsecondary education to both our kids and our state, Washington should take decisive steps to expand access to postsecondary education and increase credential attainment.

Today, Washington is a leader in associate degree production, ranking 5th among the states in associate degrees awarded per capita. However, the state lags in other key rankings, including production of bachelor's degrees (ranking 42nd among the states in degrees awarded per capita).[8] The state should take steps to improve its performance, striving to rank among the nation's top 10 states in postsecondary degree production.

In the near-term, Washington should maintain its commitment to higher education and increased postsecondary capacity with a focus on high-demand STEM degrees. The business community, educators, and policymakers should continue working together to define career pathways and raise student awareness of job opportunities and associated skills requirements.

Priority: Drive interest and performance in STEM.

Technology-based businesses and institutions have been a significant driver of economic growth in Washington for several generations. Beginning with expansion of Boeing and Hanford during World War II, and extending to the software boom that began in the 1980s, Washington has offered substantial opportunities to those with solid backgrounds in STEM fields. Our state leads the nation in the concentration of STEM jobs and is 4th in the country for technology-based corporations.[9] However, at the same time, Washington ranks 46th for participation in science and engineering graduate programs[10] and 28th for production of STEM bachelor's degrees per capita.[11]

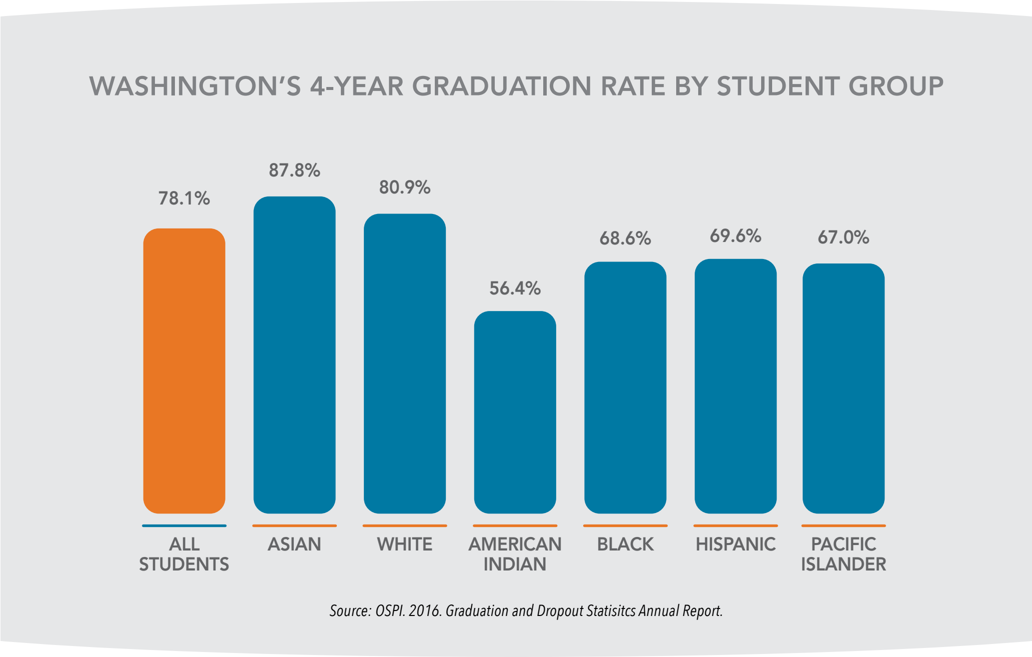
Support for postsecondary STEM programs is essential to the continued growth of our state economy and expansion of opportunity and shared prosperity. But postsecondary expansion will not be enough by itself. Increased focus on quality math and science education in pre-kindergarten, elementary, and middle school programs will give students needed experience and ignite their interest to pursue STEM coursework in high school, thus better preparing them for postsecondary education and, potentially, work in STEM fields or related professions.

Priority: Ensure students graduate from high school career- and college-ready.

The Washington job market will offer extensive opportunities in the coming years. Unfortunately, too many of our students are failing to get the education and training required to access many of these opportunities.

Among Washington students who began 9th grade in 2011, 78 percent got their diploma four years later. Our state's high school graduation rate in 2014–15 was below the national average of 82 percent, ranking Washington 41st among all states. The Washington State Board of Education has set a goal to raise the state's four-year high school graduation rate to 89 percent by 2020.[13]

Overall, the state high school graduation rate has risen incrementally in recent years. But disturbing evidence of an opportunity gap underlies this trend. Graduation rates continue to be markedly lower for black, Hispanic, Pacific Islander, and American Indian students as compared to their white and Asian peers. Graduation rates are also markedly lower for struggling students (those who score below proficiency on state assessments) and at schools the state has designated as low performing.[14]



Closing achievement gaps and improving outcomes for struggling students and those attending low-performing schools is essential to a statewide effort to expand opportunity and shared prosperity. The state should:

- **Improve K-12 Financing:** Lawmakers must ensure that state education investments lead to improved student and school performance. This includes revamping the school funding model to put the needs of students first.
- **Enhance Supports and Accountability:** The state must be able to identify low-performing schools and struggling students, and use a robust accountability system to target resources. Policymakers should strengthen support and intervention strategies, measure and report on progress, and set clear timelines for performance improvement with concrete consequences.
- **Increase Access to Educator Talent:** The state should work to increase the supply of excellent teachers and broaden their impact by attracting and retaining more high-caliber candidates, providing incentives for excellent teachers to serve in leadership roles, and expanding their reach to serve more students.

Priority: Focus early learning assistance on children most at risk of entering kindergarten unprepared.

According to the Washington State Board of Education, less than half (or 44.2 percent) of entering kindergarteners in 2015–16 were able to demonstrate the six characteristics of school readiness (as measured by the Washington Kindergarten Inventory of Developing Skills, or WaKIDS assessment). The numbers are lower for some populations (fewer than one in three Hispanic students is kindergarten ready, for example) and low-income students.[15]

The state's goal is to increase the percentage of school-ready kindergarteners to 69 percent by 2020. To get there, the State Board of Education advocates for expanding access to high-quality early childhood education. We agree. Today, only 40 percent of the state's three- and four-year-olds enroll in early learning programs, a rate that puts Washington in the bottom quartile of states.[16]

Focusing on kindergarten readiness is a cost-effective way to help ensure students begin their academic careers on a level playing field, thus increasing their potential for consistent individual growth, a successful K-12 experience, and completion of postsecondary programs. The state should continue to make targeted investments to expand early learning options for children most at risk of entering kindergarten unprepared.

MEASURING PROGRESS

The Opportunity Washington [Scorecard] scores each state on 16 variables across three categories: ACHIEVE (eight measures of education quality and outcomes), CONNECT (three measures of transportation efficiency and reliability) and EMPLOY (five measures of economic vitality). The data sets used to develop the Scorecard were selected because they are updated regularly; provide a reliable, 50-state comparison; and address the issues that communities across Washington told us are most important to expanding opportunity and shared prosperity. To normalize scoring across the data sets, the median score is set at 75 for each variable and the score of the 10th best state is set at 100. The analysis then produces a weighted average or "Opportunity Score" for each state. The Scorecard is updated throughout the year as new data becomes available.

ACHIEVE

50-State Ranking: **22** Score: **78**

Top Performers: **Massachusetts, Vermont, New Hampshire**

To measure progress against the ACHIEVE priority, the Opportunity Washington Scorecard combines eight key indicators of education and workforce training, which include 4th grade reading and 8th grade math proficiency; high school graduation rate; and associate's, bachelor's, STEM bachelor's, master's, and doctoral degrees awarded. According to the Spring 2017 Scorecard, Washington scores just above the median, coming in at 22nd among all states.

GUIDING PRIORITY II: CONNECT

Goal: Support a multi-modal transportation system that links Washington's communities to each other and the world.

- **Invest in the preservation and maintenance of Washington's road and bridge networks and make improvements in key economic corridors.**
- **Provide options for regions to plan, prioritize, and fund local transportation needs.**
- **Improve freight mobility and connections between roads, rail, and ports.**

Signs of Growth

- Population to grow 28 percent by 2022.
- Annual vehicle miles traveled to reach 60 billion by 2020.
- Freight volumes expected to triple by 2035.
- Central Puget Sound transit ridership to grow 90 percent by 2040.

Source: Connecting Washington Task Force. 2012.

We all depend on Washington's transportation system. From wheat farmers on the Palouse to winemakers in the Columbia Valley, our state's agricultural industry needs an efficient transportation system to get products to markets along the Pacific Rim and around the world. Manufacturers must efficiently move materials and components to their factories and finished goods to their customers. Businesses of all sizes rely on their employees getting to work on time. Families and individuals travel on our roads and bridges to get to school, health care, and recreation.

State government has the primary responsibility for building and maintaining the state's extensive network of roads and bridges, as well as the nation's largest ferry system. Washington is one of 22 states that constitutionally dedicate state fuel tax revenues to highway and road purposes; another four states make a similar dedication in statute.[17] Unlike many states, Washington does not use general revenues to support its transportation system.

Washington is poised for substantial increases in population and freight volumes in the years ahead. Continued growth during the coming decade will bring additional stress to the state's transportation networks, which will require vigilance in efforts to maintain and improve the state's transportation systems.

Priority: Invest in the preservation and maintenance of Washington's road and bridge networks and make improvements in key economic corridors.

Recognizing the need to help address transportation efficiency, safety, and capacity, state lawmakers approved a comprehensive state transportation investment package in 2015. Opportunity Washington endorsed the package, along with a statewide coalition composed of representatives from all sectors of Washington's business, civic, and governmental communities.

The 16-year, $16 billion Connecting Washington investment plan represents the first new statewide investment in transportation in more than a decade. It includes $1.3 billion for preservation and maintenance, $8.8 billion for project construction, and $1 billion for the state's multi-modal fund.

The investment matters because roadway congestion and inefficiency impose costs on households and make our state a less attractive place for people to live, work, and do business. The Connecting Washington investment will help to address targeted chokepoints, reform permitting to reduce project delays, undertake bridge and road repairs, and provide funding to local governments.

Realizing the benefits of the investment will take time and diligence. Lawmakers should maintain support for these investments, particularly the commitment to maintenance and preservation and project completion. Further, attention now must turn to program implementation to ensure taxpayers get the maximum value for their investment.

Priority: Provide options for regions to plan, prioritize, and fund local transportation needs.

Local governments play an integral role in developing and maintaining the transportation system. Local roads provide crucial links between the state highway system and homes and businesses in each community. These networks also face the challenges of deterioration and capacity. To address their unique transportation challenges, regions should be given the ability to prioritize and fund local transportation improvements. In densely populated metro areas, transit plays an important role. State transportation policies should continue to recognize the importance of local and regional transit systems.

Priority: Improve freight mobility and connections between roads, rail, and ports.

Within the larger context of the state's transportation system, special attention needs to be paid to the movement of freight and commercial vehicles.[18] A recent report by the American Transportation Research Institute found that nine of the top 100 truck bottlenecks were in Washington state.[19]

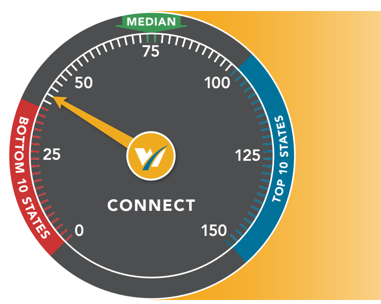
The 2015 Connecting Washington investment package funds a significant number of projects across the state that will help to improve freight mobility, the centerpieces being the extension of SR 167 to the Port of Tacoma and the link between SR 509 and Interstate 5 in Des Moines. These projects will provide routes for trucks moving freight to and from the ports of Seattle and Tacoma and within the major industrial and warehousing districts of King and Pierce counties. These big, complex projects will need consistent oversight and support in their land acquisition and permitting processes.

MEASURING PROGRESS

CONNECT

50-State Ranking: **38** Score: **42**

Top Performers: **Kansas, Montana, North Dakota**



The Opportunity Washington Scorecard combines three key indicators of transportation system performance, including commute times, bridge quality, and road quality. According to the Spring 2017 Scorecard, Washington ranks among the bottom third of states in this category, ranking 38th.

GUIDING PRIORITY III: EMPLOY

Goal: Support policies that encourage innovation, entrepreneurship, and job creation.

- **Support policies that encourage investment, job growth, and economic opportunity.**
- **Budget for long-term sustainability and prosperity.**
- **Streamline the regulatory system to improve predictability and efficiency.**

A vibrant economy requires a healthy private sector to create jobs, foster economic activity, and generate tax revenues to support essential public services. By many measures, Washington's private sector is exactly this type of dynamic force.

Washington routinely ranks as having among the most vibrant and prosperous state economies in the nation. Washington ranked No. 1 in Business Insider's assessment of state economies in early 2016, based on wages, home prices, and job growth.[20] To close out 2016, Bloomberg ranked Washington No. 3 in innovation, based on factors such as intensity of research and development, density of technology companies, and patent activity.[21] Add to that, Washington ranked 5th among the states in private-sector job growth, based on year-over-year job growth from December 2015 to December 2016.

These successes are reflective of a robust, growing economy. However, national rankings tell only part of the story. Although Washington's diverse economy offers employment opportunities in a wide variety of sectors, it is also true that employment and investment conditions outside metropolitan Seattle vary significantly. The robust Seattle economy may be able to withstand a $15 minimum wage (and results have been mixed on the effects of the city's higher minimum wage[22]); however, businesses in border counties face different competitive pressures.

Even in the economically strong metro areas, policymakers cannot take continued prosperity for granted. Economies are always evolving and growth must be nurtured. New, innovative enterprises have choices of where to locate, and other states will attempt to lure them away by offering more attractive economic climates. Washington must be prepared to compete on at least a level playing field.

Washington is an expensive place to do business. CNBC ranks Washington No. 30 in its "cost of doing business" ranking.[23] Other indicators point to similar conclusions:

- **The Council on State Taxation shows business taxes in Washington amount to 5.5 percent of private sector gross state product and $7,600 per employee; nationally, the corresponding figures are 4.6 percent and $5,800.[24]**
- **Washington has the nation's the highest worker's compensation benefit costs at $825 per covered worker, followed by California ($776.86), Alaska ($682.06), and Wyoming ($665.56).[25]**
- **Washington's unemployment insurance cost for an average full-time worker is $632, which ranks 6th highest.[26]**

- **Washington has the highest statewide minimum wage, which increased to $11 an hour at the beginning of 2017 and will phase up to $13.50 by 2020 as a result of an initiative adopted by the voters in 2016. Several cities, including Seattle and Tacoma, have adopted higher municipal minimum wages.**

To expand opportunities for those living and working throughout our state, policymakers must take steps to foster an investment climate that encourages and rewards innovation and risk-taking. Predictable and efficient fiscal, regulatory, and employment policies offer key tools for hastening that expansion.

Priority: Support policies that encourage investment, job growth, and economic opportunity.

For many employers, especially those just starting out, comparatively high business costs (state and local taxes, worker's compensation, unemployment insurance costs, etc.) can outweigh the advantages of operating here.

In 2017, worker's compensation premiums increased an average of 0.7 percent.[27] While that may seem to be a modest rise, leaders in the employer community contended the increase was unwarranted. They pointed out that some industries would see much larger increases. Further, they said the system would have broken even with a rate reduction of 2.3 percent.[28]

Washington's high business tax burden puts many employers in our state at a disadvantage in national and international markets. To level the playing field, the Legislature has, over time, adopted provisions that ease unfair burdens for the state's businesses. These adjustments, sometimes called "tax preferences," have typically served to normalize the tax structure (for example, by reducing "pyramiding" or multiple taxation of transactions in the production chain) or maintain interstate competitiveness. While scrutiny of tax policy is a routine and necessary part of the legislative process, lawmakers should be wary of imposing new business tax burdens that would jeopardize business investment in our state.

Priority: Budget for long-term sustainability, and prosperity.

Over time, and throughout various economic conditions, Washington has experienced cycles of boom-and-bust budgeting. Programs have expanded during prosperous economic times, only to be contracted during downturns. These cycles can lead to extreme uncertainty, taking a toll on students, families, public employees, and residents who rely on public services.

A commitment to sustainable budgeting replaces that uncertainty with stability, thus supporting long-range planning and ensuring a consistent level of vital services in varying economic conditions. Even with the ongoing economic recovery, our state budget will face stress for the foreseeable future. Lawmakers must remain committed to long-term sustainability.

Fiscal prudence is particularly important as the state confronts its responsibility to fully fund basic education in compliance with the Washington Supreme Court's McCleary decision. The way lawmakers choose to meet the state's obligation must be sustainable and supportive of continued economic health. Policymakers should examine revenue trends and ensure spending commitments can be maintained over the long term. Responsible budget policies, like the four-year balanced budget requirement, help avoid roller coaster effects in the state budget.

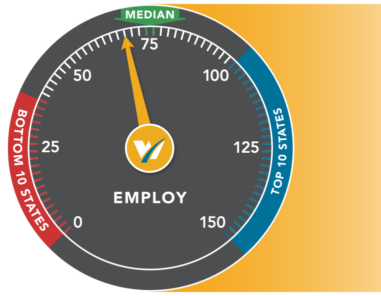
Priority: Streamline the regulatory system to improve predictability and efficiency.

Economic growth through innovation and entrepreneurship is also affected by the state's regulatory environment. Over the decades, Washington has added new regulatory systems intended to protect the natural and built environment. That said, the Pacific Research Institute ranks Washington No. 42 in regulatory burden on a scale that has No. 1 as least burdensome.[29] This is reflective of regulatory regimes that often do not fit well together, multiple layers of regulation, and requirements that contradict one another in intent and practice. Indeed, in 2015 the Washington State Auditor's Office found that "Washington does not have a strategic approach to identify and prioritize new opportunities for . . . multi-agency coordination."[30] Regulating agencies should follow the Auditor's recommendations and work toward better coordination with one another as well as greater predictability to reduce the cost and delay of regulatory compliance.[31]

Regulatory compliance raises the cost of developing facilities and operations. Sometimes this impact is indirect, as when development regulations drive up the cost of leasing commercial and industrial space. Other times it is more direct, as seen with the very aggressive environmental approach being taken with the evaluation of proposed energy export terminals at Cherry Point and Longview. In evaluating the environmental impacts of these projects under the State Environmental Policy Act (SEPA), the Washington State Department of Ecology has taken the unprecedented position of considering greenhouse gas emissions that will result from the use of these products at their destination. This regulatory overreach threatens jobs and economic activity at these planned facilities, and sets a dangerous precedent for evaluating other projects based on impacts outside the state. A recent Washington Research Council (WRC) analysis finds that "the expanded SEPA and associated political activism have resulted in permitting delays, project cancellations, and even outright bans of projects involving certain commodities. This negatively impacts the communities involved that would have benefited from increased jobs and tax revenues."[32]

Excessive regulation also restricts the supply of housing and raises its cost. For example, in the San Francisco Bay area, growth has slowed due to high housing costs and lack of housing supply.[33] We can avoid the outrageous housing prices of the Bay area by paying close attention to the impact of our state's land use regulation. Another WRC report examined the state's Growth Management Act (GMA), adopted 25 years ago, and concludes that the "GMA's rigid . . . boundaries are heading for a collision with other policy goals that are rising in priority, including housing affordability, economic disparities, and the need for new schools. GMA planning mandates 'concurrency,' which means that infrastructure, including roads and bridges, must keep up with growth. But congested roads, principally in western Washington, threaten to cripple the mobility which is vital to economic progress."[34]

The history of the GMA and other environmental protections confirms our earlier recommendation that regulatory policies should be regularly reviewed to see that benefits justify the costs of compliance. As circumstances and priorities change over time, it will be important to be certain that the policies already in place continue to work for the future.



MEASURING PROGRESS

EMPLOY

50-State Ranking: **30** Score: **68**

Top Performers: **Utah, Virginia, Massachusetts**

The Opportunity Washington Scorecard combines five key indicators of economic vitality including two business tax measures, the unemployment insurance tax, private sector R&D investment, and entrepreneurial activity. According to the Spring 2017 Scorecard, Washington scores among the bottom half of states, ranking 30th.

Conclusion

Opportunity Washington: Priorities for Shared Prosperity is a roadmap for expanding Washington's culture of opportunity to individuals, families, employers, and communities in every corner of the state. It recognizes that Washington's economy is very different than it was at the start of this century. Our state and our economy have experienced extensive and even unpredictable change. Washington has responded well, but, with smart public policy and strategic investments, we can be better.

Achieving the goals and priorities outlined by Opportunity Washington will require strong collaboration and a shared commitment to expanded opportunity and shared prosperity. The Washington Alliance for a Competitive Economy, along with a statewide coalition of partners representing varied interests, industries, and economic clusters, is committed to this effort. We invite you to join us. Learn more at www.opportunitywa.org.

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26 From WashACE 2017 Competitiveness Redbook, Table 24

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