

**Yamhill County Agri-Business
Economic and Community Development Plan**

Stakeholder Interviews – Agriculture Sector

SUMMARY REPORT

Prepared for:



Yamhill County, Oregon

By:



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I. Executive Summary

Yamhill County Agri-Business Economic and Community Development Plan

Yamhill County has commissioned a new study – the *Yamhill County Agri-Business Economic and Community Development Plan* – to look into the future for the County’s agriculture and tourism industries. In Yamhill County and across Oregon and the Pacific Northwest, agriculture is under pressure. Population growth and urban development, combined with competitive market forces, threaten traditional agriculture. At the same time, some segments within agriculture are flourishing – and Yamhill County benefits from several of these emerging crops / products. The Yamhill Valley wine industry contributes significantly to Oregon’s brand, and lends cache to Portland’s reputation as a food center. Craft-beer, horticulture, fine food specialties, and other promising ag sub-sectors are also present in Yamhill County.

Yamhill County wants to ensure its local agriculture industry can continue to thrive – operate profitably, grow in place and contribute to community livability in all parts of the county. In response, a plan is being developed to promote cooperative regional economic and community development in order to establish and expand the essential businesses and services needed to support the local agriculture sector.

Unlike agriculture, long a mainstay of the local economy, Yamhill County’s tourism industry is still comparatively new. The emergence of the wine industry and other new attractions are beginning to draw significant numbers of visitors. Communities recognize the importance of this fast growing sector, and its intimate connection to agriculture.

Three key elements of Yamhill County’s plan – agriculture, tourism, land use – are addressed in the project workscope. Key questions to be answered by the study:

- What is the current condition of Yamhill County’s agriculture sector?
- What activities and businesses are necessary to support local agriculture?
- What is the current condition of local tourism? And what activities and businesses are needed to support the tourism sector?
- Are suitable sites available for agriculture and tourism support businesses?

Several agencies and organizations are participating in the study: the Oregon Department of Land Conservation & Development, Oregon Economic & Community Development Department and McMinnville Economic Development. Representatives of these agencies participate in a Steering Committee that guides the project.

The Yamhill County Agri-Business Economic and Community Development Plan is scheduled to be completed in early 2009. Results of the analysis will contribute to finding solutions that assure the continued vitality of the two key economic sectors.

To conduct the study, Yamhill County retained a consultant team led by Barney & Worth, Inc., E.D. Hovee & Co., Globalwise, Inc., and Spencer & Kupper. The consultants provide specialized expertise in economic development, agricultural economics, tourism, land use planning, and competitiveness strategies. The outcome for Yamhill County will be a better understanding of the competitive challenges and opportunities which provide the platform to

support the county's competitiveness in agriculture and tourism sectors. The Yamhill Agri-Business Economic and Community Development Plan will involve stakeholders and the public in examining the local agriculture and tourism sectors' future needs, assuring those sectors' continued vitality while enhancing community livability. In addition to stakeholder interviews covering the agriculture and tourism sectors, there is also a 10-member Advisory Committee with countywide representation.

Stakeholder Interviews

As an early step in the study, the consultant team interviewed a cross-section of interested stakeholders who are involved in or knowledgeable about the agriculture sector: owners and managers of wineries, nurseries and farms (hazelnuts, perennial grasses, field crops), farm supply companies, a meat packing operator, a dairy farmer, farmers co-op manager, health food manufacturer, local elected officials, and staff from the Oregon Department of Agriculture, Oregon Economic and Community Development Department, Oregon Water Resources Department and the public-private partnership venture Enterprise for Employment and Education. Interviews were conducted by Barney & Worth and Globalwise, Inc. in-person and by telephone with 27 persons who are involved or have an interest in the future of Yamhill County agriculture.

Participants were asked to share their perceptions related to the current situation in the local agriculture sector, along with their vision and suggestions for the future.

This report reflects the advice, feelings and attitudes of the individuals interviewed. It is not intended to provide a scientifically valid profile of community opinion as a whole.

Summary of Findings

The following findings highlight the main points offered by key agriculture community stakeholders and other observers who were interviewed for the *Yamhill County Agri-Business Economic and Community Development Plan*.

Key findings:

1. **Yamhill County agriculture is unique, progressive, and diverse.** Key stakeholders say a local agriculture sector with these characteristic traits, when coupled with the presence of a large number of wineries, provides a unique Oregon experience.
2. **The local agriculture sector is growing and prosperous.** Grapes and wine, hazelnuts, nursery plants and grass seed are currently valuable commodities. With the wine industry leading the way, local agricultural leaders are optimistic about future success.
3. **The wine industry is the fastest growing and most important economic segment.** While most agricultural products are shipped to customers outside the county or State, area wineries are improving local economic conditions by "fueling growth and tourism" in Yamhill County.
4. **The value derived from local agriculture includes: economic, environmental, and lifestyle benefits.** Economic benefits include increased tourism from wineries,

employment, value-added industries, support industries and economic stability. Yamhill agricultural businesses are considered good stewards of the environment – making agriculture a truly “green” industry. Observers say a picturesque setting and rural lifestyle are equally important benefits derived from agriculture. Wineries also contribute a special identity and culture for Yamhill County.

5. **The related businesses needed to support agriculture are already in place.** The necessary supplies, services and products are available locally or within reach, but opportunities remain for ag-related value-added businesses.
6. **Yamhill County agriculture is going “green”.** The increasing utilization of sustainable and organic farming practices and the use of alternative and renewable energy sources by the agricultural industry in Yamhill County should be showcased, observers say.
7. **Blending tourism with agriculture requires a delicate balance.** There’s a need to create more and better accommodations for visitors, while protecting valuable agricultural land and lifestyles, and providing necessary infrastructure and resources that serve visitors as well as local communities. Creative, community-wide solutions will be required.
8. **Better communication is needed between wineries, traditional agriculture and tourism sector.** Observers say the agricultural community should work together and be better coordinated on issues related to growth and tourism. Close collaboration with the hospitality sector will produce economic benefits for the whole county.

The next sections provide a more detailed discussion of the results of the 27 stakeholder interviews conducted in October-November 2008 for the Yamhill County Agri-Business Economic and Community Development Plan. A list of persons interviewed and discussion questions appear in an appendix.

II. Yamhill County Agriculture

At the opening of each interview, participants were asked to describe their personal involvement in Yamhill County agriculture.

Personal Involvement in Yamhill County Agriculture

In what ways have you/your organization been involved in Yamhill County agriculture? (Please describe your agricultural enterprise).

Most of the stakeholders interviewed are agricultural producers or are actively involved in organizations or activities directly linked to the local agriculture sector.

The range of interview participants includes: winery owners / managers, nursery operators, hazelnut and perennial grass farmers, farm supply dealers, dairy farmer, meat packing operator, farmers' co-op manager, health food manufacturer, County policymakers, and staff from key local and State agencies.

The Current Situation

How would you describe Yamhill County's agriculture sector to a visitor who is unfamiliar? What key assets or characteristics would you be sure to point out?

Participants describe Yamhill County as unique, progressive, and diverse. High quality soils and a temperate climate enable farmers to grow anything from wheat and corn to berries, nuts, grapes and ornamentals. Yamhill is always among Oregon's top 10 counties for agricultural sales. It is the largest producer of wine and wine grapes in Oregon, and the largest producer of hazelnuts in the U.S. The County's biggest crop is grass seed.

Stakeholders agree that wineries are a key Yamhill County asset. Stakeholders describe the local wine industry as collaborative and robust and claim this segment is "fueling growth and tourism" in Yamhill County. New wineries tend to be small operations – with 10 to 20 acre vineyards. Hazelnuts, grass seed and nurseries are the next most important assets.

Many stakeholders discuss the increasing use of sustainable and organic farming practices and introduction of alternative and renewable energy sources by the agricultural industry in Yamhill County. A few examples include the use of micro hydro, wind and solar power. Other growers are utilizing state-of-the-art water reclamation and agricultural practices.

How would you characterize the current condition of Yamhill County agriculture? Is this economic sector growing? (Why / why not?)

Stakeholder consensus is that Yamhill County agriculture is growing and prosperous in a number of key areas. Due to market forces and increasing land prices, some traditional agricultural crops are being replaced by higher value crops.

Growing	Declining
Grapes & wine	Hay
Hazelnuts	Corn
Nurseries	Livestock
Grass seed	Christmas trees
Specialty crops and organic produce	Hood strawberries

What are the most important and fastest growing segments within Yamhill County agriculture?

The wine industry is thought to be the fastest growing and most important economic segment within in Yamhill County agriculture, due in part to the added spinoff benefit of tourism. Hazelnuts and horticulture are a close second and third place to the wine industry. By acreage, grass seed and small grain are the largest crops and continue to have an important economic role in Yamhill County.

Specialty crops – such as blueberries, olives, local produce and organic products – comprise a growing segment of local agriculture. These products are sold at farmers markets, high-end retail stores and to restaurants. Also, consumer awareness of local food options is growing and many small farmers are taking the opportunity to reach out and market directly to the public.

For your own enterprise – who are your customers, and where are they located?

Agricultural producers report they have some local customers, but most products are shipped out of Yamhill County or out of state. Exceptions to this include direct sales of wine to tourist at wineries (20%-30% of sales are direct) and small vineyards that sell grapes to local wineries. Most agricultural support companies' customers are located in Yamhill County, but they also provide services / equipment to customers in Polk, Marion and Washington Counties.

Sector	Customer Description
Wineries	Large number of customers from the Pacific Northwest, but a good mix from all over the world 20% - 30% direct sales at winery Affluent tourists
Grapes	Half to the Portland and Salem area and half all over Small vineyard, local sales only.
Hazelnuts	National and international customers
Grass seed	98% contract with broker – sold as bulk seed
Nurseries	6% sold in Oregon, 20% in western United States, the remaining sold outside the western states
Meats	Across the country – strong in Portland Retail trade Sells to wineries and restaurants in Yamhill, but business much bigger than local area
Berries	Western US, some export to Japan and Europe
Dairy	Milk – Pacific Northwest. Butter and powders – US
Health food manufacturer	All over the US, Australia and United Kingdom
Farmers Co-op	Most customers in Yamhill County, a few in Polk, Marion and Washington Counties
Farm Equipment	Yamhill, Washington and Polk Counties

What are the chief benefits that Yamhill County and its communities derive from agriculture? (Any drawbacks?)

Local agriculture sector leaders say the chief benefits derived from agriculture fall into three categories: economic, environmental and lifestyle.

Economic benefits include increased tourism from wineries, local employment and the development of value-added industries and support industries. Examples of support industries that directly benefit from the agricultural sector include machinery and equipment dealers, fertilizer and chemical companies, barrel makers and the service and hospitality industry. Stakeholders feel the agricultural sector also lends economic stability to Yamhill County.

Responders describe the Yamhill agricultural community as good stewards of the environment and view agriculture as a “green” industry, citing benefits such as clean air and open space.

The picturesque setting and rural lifestyle are also “quality of life” benefits derived from agriculture. And wineries contribute a special identity and culture for Yamhill County.

The main drawback identified by participants relate to conflicts between growth and agriculture – in the use of land, and conflicts that may arise when “urban” people who do not understand agricultural practices move close to agricultural operations. Other drawbacks include the lack of family-wage jobs, and lack of hotels for tourists.

Looking Ahead – the Future of Agriculture

Looking ahead, what will emerge as the key issues / challenges / opportunities facing local agriculture over the next five years?

Issues, challenges, and opportunities identified by interview participants:

- Population growth and development pressure
- Rising land prices
- Traffic congestion
- Surface and groundwater supply limitations
- Land use laws / zoning
- Infrastructure needs – drinking water, wastewater and road maintenance
- Lack of industrial sites outside McMinnville and Newberg
- Low paying jobs
- Small labor pool
- Rising costs of fuel, chemicals, equipment, labor
- Urban-rural conflicts over land use & development and farming practices
- Siting hotels and encouraging tourism in wine country
- Maintaining and expanding markets for local agricultural products
- Ag community not a united force in policy discussions

Challenges

- Growth – finding the right balance with limited land (zoning and land use laws)
- Targeting the “right” industries
- Finding a balance between making places for tourist and protecting agricultural land
- Managing conflicts between rural and urban communities
- Integrating the Hispanic population into the workforce
- Creating a mix of employment opportunities
- Improving communication between ag community and policy makers
- Competing internationally (few crops are grown for local consumption)
- Protecting crops from diseases and infestations
- Managing cropland
- Getting supplies and product out (high energy costs impact fertilizer, fuel and plastic)
- Understanding the impact of losing small and large livestock producers
- Coordinating Portland area and Yamhill County tourism marketing efforts
- Managing the water supply

Opportunities

- Growing interest in local and sustainable food could increase opportunities for regional markets
- Growing ethnic populations create new marketing/demand opportunities
- Technology and knowledge improvements creating opportunities for new products, production methods
- Possible expansion of agri-businesses such as farm tours
- Expansion of agriculture-related events – Pinot Noir Festival and Pinot Oregon Camp
- Specialty crops, branding of products, small truck farms with unique products
- Aviation, aeronautics, balloon, airplane, helicopter tours
- More value added processing
- Find opportunity sites for development in compact communities
- Fix traffic congestion problem
- Showcase Yamhill County products to tourists
- Patented varieties of seed crops can help insulate the best growers from some price fluctuations
- Young farmers have many opportunities: natural resources, new technology, and advanced equipment
- Winery expansion
- Expand lodging options: allow more than 10 lodging units at B&B operations and encourage more resorts like the Allison
- Innovative water rights management
- Promote tourism

What should be the goals for Yamhill County's ag sector in the future? Is growth within this sector a realistic expectation?

Stakeholders agree that growth in the local ag sector is likely, with the wine industry leading the way. Goals for Yamhill County agriculture should include:

- ✓ Retain rural charm.
- ✓ Promote well balanced development.
- ✓ Support a rich and diverse agricultural industry.
- ✓ Focus efforts on high value agriculture.
- ✓ Encourage environmental stewardship and the use of alternative energy sources.
- ✓ Capture more value to profit local farmers.
- ✓ Investigate and utilize modern agriculture techniques and technology.
- ✓ Preserve and protect water supply.
- ✓ Communicate the agriculture sector's priorities to elected officials.
- ✓ Mitigate tourism issues – traffic congestion, road maintenance, other.

What are the key ingredients to make local agriculture still more successful?

Improving communications among growers and creating a shared vision for the future of Yamhill County agriculture will be critical to future success. Respondents say that a key ingredient for success will be to keep land use laws strong – but find ways to provide the needed resources for the fast growing and economically important hospitality sector. Other participants suggest the County needs to capitalize on innovations such as the use of green technology.

III. Businesses Necessary to Support Agriculture

Businesses to Support the Agriculture Sector

What ag-related businesses are necessary to support local agriculture? Are these already in place – or is something missing? (Anything needed to support your own agriculture enterprise that isn't available locally?)

Respondents generally agree that sufficient ag-related businesses are in place, with necessary supplies, services and products already within reach for local agricultural producers. Areas identified for possible growth include:

- Small farm equipment
- Sophisticated processing facilities for berries
- “Green” industries
- High-speed internet service

A few respondents offer suggestions for new value-added businesses and activities, including:

- Businesses that showcase local produce
- More lodging/hospitality options
- New visitors center

Transportation system improvements are also mentioned as an unmet need that would benefit local agriculture.

Opportunities to Expand

What opportunities for new or expanded support businesses exist: In the wine industry? In other segments of agriculture?

While observers say that most of the pieces are already in place to support local agriculture, nevertheless most still see some room for expansion. Specific opportunities identified for the wine industry and other segments of agriculture are listed below.

For the Wine Industry

Hospitality – a mix, including small, European style boutique hotels

Specialty grocery stores

Oak barrel producers

Vineyard suppliers: nursery, winery equipment/supplies

Glass bottling

Gas monitoring technology

Expanded tourist activities: cycling tours, hot air balloon rides

Rental car companies

Make more out of the food and wine connection in Yamhill County: “Pair pinot and pork”.

For Other Segments of Local Agriculture

Specialty crops

U-pick opportunities

Local manufacturers are able to produce sorting machines, conveyor systems

More fresh markets

Are adequate sites available to accommodate these ag related businesses? (Where should they be located?)

Respondents say that there are adequate support businesses in place and that current land use law allows for most critical ag support activities to locate on ag land or nearby. There is not a strong need for additional sites for agriculture related businesses. There are other critical needs to support agriculture, however: including adequate water supply, labor pool, transportation infrastructure and suitable, developable sites for value-added producers.

Relationship Between Agriculture and Tourism

Do you see any relationship between the agriculture and tourism sectors? (Do they support one another?)

Stakeholders describe a sliding scale of interaction between the agriculture and tourism sectors. For wineries, the connection is direct – wineries need a strong tourism base to sell their products: “winery direct sales are a cash cow”. Participants think there is also an opportunity for other growers to capture some tourist dollars. Consumers want to know more about their food and purchasing food from local farms is a fast growing trend.

For the meat processing segment and other local specialties, wine and tourism create a market for sales to local restaurants and farmers markets. At the far end of the scale are nurseries and ornamental plant growers that benefit little from tourism as most of their products are wholesaled to customers out of state.

Respondents agree that there is not much interaction between wineries and traditional agriculture and it is a connection that could be improved to benefit Yamhill County.

IV. Final Advice

At the end of each interview, the participant was given an opportunity to offer summary remarks and key points to emphasize.

What persons or organizations would you suggest be contacted to seek their views on the future of Yamhill County's agriculture sector?

Many of the same persons who were interviewed were recommended by other participants in response to this inquiry. Participants frequently suggest talking with experts in agriculture, land use, tourism, business development and water resources, including some of the persons interviewed. Other persons / organizations nominated included winery owners, farmers, dairy farmers, vineyard suppliers, festival organizers, Willamette Valley Wineries Association, Oregon Wine Board and 1000 Friends of Oregon.

Additional names suggested by interview participants:

Nancy Duncan, Chemeketa Community College
Whitney Gauger, Pinot Noir Festival
Bill Hatcher, A-Z Winery
Sue Horstman, Willamette Valley Wineries Association
Jim Johnson, Oregon Department of Agriculture
Mike McCord, Yamhill County watermaster
Jeff Miller, Travel Portland
Holly Nelson, Chemeketa Community College
Dave Povey, University of Oregon
Del Smith, Evergreen Agriculture
Susan Sokol Blosser, Sokol Blosser Winery
John Stewart, Abbey Road Farm B&B
Bob Terry, Fisher Farms
Land use specialist with Oregon Department of Agriculture
Local County Farm Bureau
County Extension Agent
Oregon Women for Agriculture Chapter
Growers Associations and farm stands doing direct marketing
Chemeketa Community College and University of Oregon staff
Travel Portland and Travel Oregon

If you were asked to provide a “single most important piece of advice” for the Yamhill County Agri-Business Plan – what would it be?

In responses, most observers underscore the importance of Yamhill County agriculture: “Agriculture – celebrate it! It is one of the greatest engines for this country and this county.”

Another point raised by many is the need for careful planning to preserve the character of Yamhill County and its communities: “Don’t fill up every inch of the County and accept every developer’s plans”. “Keep agriculture free from development”. “Protect the farmland”.

Additional advice:

“Ensure research and new production methods are evaluated and presented to the farmers.”

“Make sure the farmers make money. God willing people stay with it.”

“Grants directed towards nurseries, private research.

“The ag community needs to focus on quality in their products, protect the environment and support tourism.”

“Land use planning laws are most important to supporting ag. Be firm but reasonable and flexible. If they get too rigid then adverse measures come along.”

“Get creative with new water systems.”

Any additional comments or suggestions?

Further observations, advice and questions offered by interview participants:

- Find ways to educate urban citizens on the importance and role of agriculture in the community. Utilize partner organizations to get the word out – Chamber of Commerce, farmers markets and others.
- The new Farm Bill has funds for specialty crops. Oregon needs to be sure and take advantage of these funds.
- Does Yamhill County Farm Bureau have a policy on the extension of resorts on EFU land?
- “Oregon is a great place to live. Capitalize on the bounty! Let people know it’s a great place to visit – then let people stay overnight.”

V. Appendices

Yamhill County Agri-Business Economic and Community Development Plan

Stakeholder Interviews – Agriculture Sector

Susan Aldrich-Markham	OSU Extension Service (retired)
Mike Anderson	Farmers Creamery Coop
Agnes Balassa	Enterprise for Employment & Education
Kendall Bergstrom	Bergstrom Wines
Barbara Boyer	McMinnville Farmers Market
Kevin Chambers	Oregon Vineyard Supply
Stan Christiansen	Grower (retired)
Zack Christiansen	Yamhill County Farm Bureau
Dave Cruickshank	Grower, Yamhill County Soil & Water Conservation District
Ken Durant	Red Ridge Farms
John Dyne	Carlton Farms
Ted Farthing	Oregon Wine Board
Tom Fox	Oregon Economic & Community Development
William Fujii	Oregon Water Resources Department
Kathy George	George Packing Company, Yamhill County Commissioner
Mark Hurst	Hurst's Berry Farm
Susan Jeffries	Betty Lou's Inc.
Jim LeTourneux	Tripletree Farm
Leslie Lewis	Yamhill County Commissioner
David Millman	Domaine Drouhin Winery
Brent Searle	Oregon Department of Agriculture
Alex Sokol Blosser	Sokol Blosser Winery
Julie Staigers	Crumbled Rock Winery
Rick Wells	Monrovia Nursery
Sam White	Wilco
Ken Wright	Ken Wright Cellars
Chrissie Zaerpoor	Kookoolan Farms

**Yamhill County Agri-Business
Economic and Community Development Plan
Stakeholder Interviews – Agriculture**

DISCUSSION GUIDE 10/14/08

Name: _____ **Phone:** _____

Organization: _____ **E-Mail:** _____

Address: _____

Introduction

Yamhill County and several partner organizations are beginning a project looking into the future of the County's agriculture and tourism sectors. The study will explore which businesses are needed to support and expand agriculture and ag-related tourism within the county. The results are anticipated to be ready in early 2009.

At the project's outset, local industry leaders in agriculture and tourism are being contacted and asked to share their views.

Background

1. In what ways have you/your organization been involved in Yamhill County agriculture? (Please describe your agricultural enterprise).

2. How would you describe Yamhill County's agriculture sector to a visitor who is unfamiliar? What key assets or characteristics would you be sure to point out?

Yamhill County Agriculture

3. How would you characterize the current condition of Yamhill County agriculture? Is this economic sector growing? (Why / why not?)

4. What are the most important and fastest growing segments within Yamhill County agriculture?

5. For your own enterprise – who are your customers, and where are they located?

6. What are the chief benefits that Yamhill County and its communities derive from agriculture? (Any drawbacks?)

7. Looking ahead, what will emerge as the key issues / challenges / opportunities facing local agriculture over the next five years?

Issues _____

Challenges _____

Opportunities _____

8. What should be the goals for Yamhill County's ag sector in the future? Is growth within this sector a realistic expectation?

9. What are the key ingredients to make local agriculture still more successful?

Support Businesses

10. What ag-related businesses are necessary to support local agriculture? Are these already in place – or is something missing? (Anything needed to support your own agriculture enterprise that isn't available locally?)

11. What opportunities for new or expanded support businesses exist:
In the wine industry? _____

In other segments of agriculture? _____

12. Are adequate sites available to accommodate these ag related businesses? (Where should they be located?)

13. Do you see any relationship between the agriculture and tourism sectors? (Do they support one another?)

Wrapup

14. What persons or organizations would you suggest be contacted to seek their views on the future of Yamhill County's agriculture sector?

15. If you were asked to provide a "single most important piece of advice" for the future of Yamhill County agriculture – what would it be?

16. Any additional comments or suggestions?



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