

Five business advisors graduate

Cohort studied accounting, marketing in 40-week program

By Elijah Sussman

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The first graduating cohort of EDC Team Jefferson's business advisors training stands with certificates. From left to right are George Sawyer, Kit Malone, Devin Rodriguez, Charlotte Richardson and Justine Wagner. Standing is the EDC's Executive Director David Bailiff. Sitting is the EDC's Program and Finance Manager Phoebe Reid and course instructor Ray Sparrowe.

PORT TOWNSEND — A cohort of five Clallam County- and Jefferson County-based business advisors have graduated from a 40-week pilot program.

The program, an initiative of EDC Team Jefferson, is planned to yield the counties with 25 advisors in the coming years and is funded by Recompete grant dollars.

The goal is to see the rural economies expand the availability of family-wage jobs by strengthening existing and/or forming businesses, EDC Program and Finance Manager Phoebe Reid said.

The students of the advisor cohort each brought business experience into the course. They were Justine Wagner, Kit Malone, George Sawyer, Devin Gonzalez and Charlotte Richardson.

Sawyer said he was motivated to take the course because the vulnerability of the local economy was on display during the COVID-19 pandemic. Also, as he participated in recent unionization efforts at the Port Townsend Co-op, he saw

that people did not have alternatives to working in a conflicted work environment.

He framed his motivation as selfish, saying he wants to live in a place where he knows the community is thriving, because it will improve his life.

Many area small businesses may have two to four employees, he said. A desired course outcome is to see those businesses build capacity to expand that number to four to six, he added.

The course initially was designed by business advisor Douglas Hammel, based on his “Succeed!” book. Hammel taught the course as planned through May, June and part of July, but he ultimately stepped away.

Port Ludlow’s Ray Sparrowe, a former business professor with a career emphasis on organizational leadership, took over the course. Sparrowe redesigned it and broke it into five parts.

“The first is basic finance,” he said. “Having the participants have confidence in modeling relationships among price, unit sales, and profits — whether they did that in Excel or on the back of an envelope.”

Understanding an income statement is key, Sparrowe said. Some of the group members came in with a strong understanding of the concepts, he added.

The second focus was on how to be an advisor. Sparrowe framed questions, and he and the participants moved through answering them together.

“What’s the process like?” Sparrowe asked, exemplifying the course module. “How do you identify the relevant symptoms of business problems? How do you discover causes with a client? How do you formulate and evaluate alternatives? How do you come upon the right recommendations?”

Sparrowe then focused on what he calls frameworks, considering core facets of a business, including marketing, human resources and leadership, and working through strategies for addressing common challenges within the frameworks.

Next, a series of seven local business owners presented to the group to give the advisors in training more of a sense of the challenges and opportunities that operating a business on the Olympic Peninsula presents, Sparrowe said.

The course, which wrapped before the holidays in December, culminated with a section focused on building a resource and referral network. For that section, Sparrowe decided to lean on the strengths of local businesses.

“We had another seven people come in, all of whom were delighted to talk about the kinds of things their business did and to welcome referrals from the business advisors,” he said.

Guest speakers, who covered topics like payroll, accounting, human resources and marketing, were among the most educational, Wagner said.

Wagner said she found the course extremely valuable. She said she benefited from the connections she made with her fellow advisors and with local business.

A point that Wagner said she found particularly interesting was when representatives from Kristen Manwaring Insurance presented on assessing when the right time for a small business to start offering benefits begins.

“They talked about benefits, health benefits, vision, dental and how to assess when a business is ready to offer those things for their employees,” Wagner said. “What that looks like, what the cost is, and how they weigh if the cost is something that the business can take on while still staying afloat.”

Wagner is the Apex program manager with Clallam Economic Development Council, where she counsels with businesses on accessing government contracts. She is set to instruct the next round of business advising classes, starting in late March.

For Sawyer, whose background includes consulting for professional service companies in Silicon Valley, the core financial lessons were a beneficial refresher.

The course helped him translate prior consulting experience to very small, rural businesses, he said.

Sawyer also said that hearing from guest lecturers was a highlight. He named succession plans as an important and under-considered facet of business that held his attention.

The next round of classes will cover the same range of topics, but it will be refined into a 12-week duration, with classes lasting two hours rather than three.

Many of the advisors and potential future advisors work full-time jobs and found the length of the course and of particular classes to be unnecessary. The improved time frames could increase access to working professionals, Wagner said.

Reid said the EDC is still working out how it will support and maintain connection with graduated advisors.

“We’re trying to create a monthly community of practice; sharing best practices, sharing challenges and engaging further with local businesses and guest speakers,” she said.

The EDC has allocated funds to compensate the new business advisors for up to three free sessions per business.

For those interested in taking the business advising course, applications are available at tinyurl.com/3mf5x5p4.

Those interested can seek advice through recent graduates, whose bios and email addresses can be found at tinyurl.com/3aszk6pa.

Reid said the program is available to aspiring business advisors from both Clallam and Jefferson counties and that some future cohorts are likely to be focused on Clallam County.

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