

Southeast Alaska 2025 Economic Plan

Southeast Conference's Comprehensive
Economic Development Strategy
2021-2025



Updated February 2023

Southeast 2025 Strategic Plan Introduction

Southeast Conference is the designated Economic Development District (EDD) through the US Economic Development Administration (EDA). As the region’s EDD, Southeast Conference is responsible for developing a Comprehensive Economic Development Strategy (CEDS) for Southeast Alaska that is designed to identify regional priorities for economic and community development. The CEDS is a strategy-driven plan developed by a diverse workgroup of local representatives from private, public, and nonprofit sectors. The following sections form the basis for the Southeast Conference CEDS:

One page Strategic Plan Summary page 2;

SWOT Analysis to identify regional Strengths, Weaknesses, Opportunities, and Threats **page 3;**

Summary Background of economic conditions in the region **pages 4-16;**

Economic Resilience map detailing how Southeast Alaska businesses are responding to the COVID-19 economic crisis **page 19-20;**

Strategic Direction Action Plan incorporating tactics identified through planning process, other plans, and stakeholder feedback to develop the priority strategies for the region **pages 21-39;**

Strategic Direction Action Plan Part II Priority Objective Descriptions and Evaluation Framework to identify and monitor performance measures associated with the plan **pages 40-46;**

Economic Plan Steering Committee roster of names **page 46 to 49;**

Appendices page 50.

The CEDS process began in February 2020 to ensure maximum input from the Southeast Conference membership. This process engaged community leaders, leveraged the involvement of the private sector, and developed a strategic blueprint for regional collaboration. More than 400 people representing small businesses, Alaska Native organizations, municipalities, tribes, and nonprofits were involved in various elements of the planning process. The following timeline shows meetings that took place in developing the five year plan. The plan was originally released in June 2021.

Southeast Alaska Comprehensive Economic Development Strategy Meeting Schedule 36 Meetings, 400 Stakeholders

	Transportation	Energy	Timber	Seafood	Health Care	Tourism	Mining	Other CEDS
Winter 2020	●	●	●	●	●	●	●	●
Spring 2020	●	●	●	●	●	●	●	●
Summer 2020		●	●	●				
Fall/Winter 2020	●	●	●	●		●	●	●
Spring 2021	●	●	●	●		●	●	●

SOUTHEAST 2025 STRATEGIC PLAN SUMMARY

In April 2021, Southeast Conference released the Southeast Alaska 2025 Economic Plan, a five-year strategic plan for the region. The membership worked together to develop an overall vision statement, more than 50 objectives, and 4 priority objectives, along with regional and industry specific SWOT analyses. More than 400 people representing small businesses, tribes, Native organizations, municipalities, and nonprofits were involved in various elements of the planning process. The Plan's prioritized objectives are listed below.

TRANSPORTATION

- ★ 1. **Priority** Sustain and support the Alaska Marine Highway System
- 2. Develop a long-term, strategic, multi-modal, regional transportation plan
- 3. Ensure the stability of regional passenger transportation services
- 4. Move freight to and from markets more efficiently
- 5. Ports and harbors infrastructure improvements
- 6. Road Development



SEAFOOD & MARITIME

Seafood

- ★ 1. **Priority** Mariculture development
- 2. Work to promote a year-round seafood economy
- 3. Further develop seafood markets
- 4. Maintain a stable regulatory regime
- 5. Research the effects of changing ocean conditions on the marine environment
- 6. Support regional processors becoming economically competitive
- 7. Communicate the importance of salmon hatcheries
- 8. Seafood sector workforce development
- 9. Full resource utilization & ocean product development



Maritime

- 1. Increase employment & training opportunities for Southeast Alaska residents in the Marine Industrial Support Sector
- 2. Increase energy efficiency & reduce energy costs
- 3. Expand marine industrial support capacity

VISITOR INDUSTRY

- ★ 1. **Priority** Market Southeast Alaska to attract more visitor spending and visitor opportunities
- 2. Grow cultural and arts tourism opportunities
- 3. Increase access to public lands and expand trail network
- 4. Increase yacht and small cruise ship visitation
- 5. Educate public on the economic value of tourism



ENERGY SECTOR

- ★ 1. **Priority** Promote beneficial electrification
- 2. Continue to support rural Southeast communities with high-cost electric rates without access to lower cost hydroelectricity
- 3. Work with communities to create energy systems that provide sustainable, affordable, renewable thermal energy
- 4. Implement regional energy plan with a focus on "committed units" and deployment of renewables
- 5. Energy workforce development

MINING INDUSTRY

- 1. Proactively support mining operations and mineral exploration projects
- 2. Support efforts to increase access to minerals and energy sources for mining on state and federal lands
- 3. Mining and exploration workforce development
- 4. Preserve access to reliable, year-round transportation for miners living in rural Southeast Alaska
- 5. Attract mining capital

HEALTH CARE

- 1. Plan for a post COVID-19 health care system
- 2. Retain Alaska-trained health care students
- 3. Meet the health care needs of an aging population
- 4. Increase health care training within the region and state



TIMBER INDUSTRY

- 1. Provide an economically viable and dependable supply of timber from the Tongass National Forest to regional timber operators
- 2. Revise the Tongass National Forest Land Management Plan
- 3. Support an integrated timber industry that includes harvest of young growth and old growth
- 4. Community-based timber workforce development
- 5. Work with USFS to direct federal contracts and timber sale opportunities toward eligible locally owned businesses



OTHER OBJECTIVES

- 1. **Child Care:** Increase child care capacity
- 2. **Housing:** Support the sustainable development of housing
- 3. **Communications:** Improve communications access
- 4. **Education Objective:** Partner with University of Alaska Southeast and K-12 school districts to build career pathways and meet employer needs for a skilled workforce
- 5. **Natural Disaster Planning:** Support disaster preparation and relief efforts
- 6. **Solid Waste:** Support regional solid waste management solutions
- 7. **Food Security:** Increase supply, demand and equitable access and distribution of local foods and regional food system opportunities
- 8. **Arts:** Increase the recognition of Southeast Alaska's thriving Northwest Coast arts economy
- 9. **Cultural Wellness:** Support the development of activities and infrastructure that promotes cultural wellness and multicultural wellness

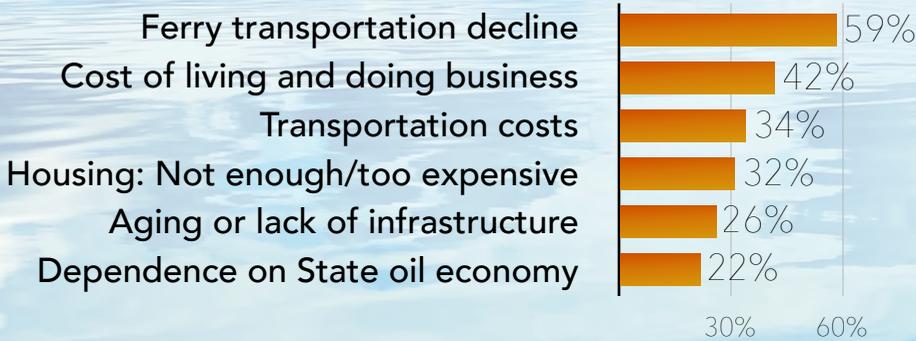


Southeast Alaska's Strengths Weaknesses Opportunities Threats

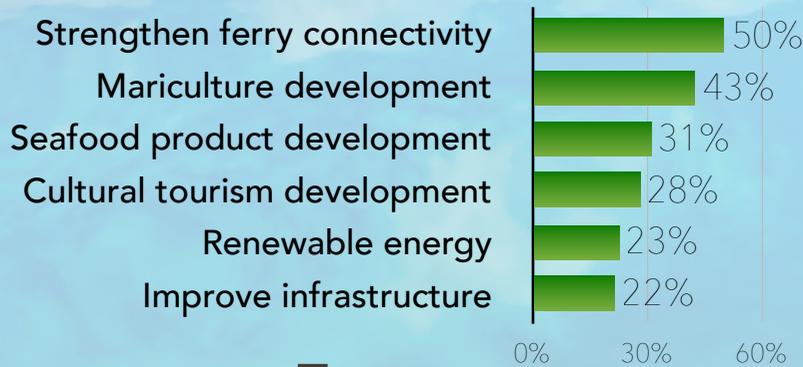
STRENGTHS



WEAKNESSES



OPPORTUNITIES



THREATS



2025 ECONOMIC PLAN DEVELOPMENT

More than 400 regional leaders participated in the overall or sector specific strengths, weaknesses, opportunities, and threats analysis and prioritization.

Seafood

- Top Strength: **High quality product**
- Top Weakness: **Changing ocean conditions**
- Top Opportunity: **Increase value added processing**
- Top Threat: **Ocean change or warming**

Health Care

- Top Strength: **Personalized care delivery**
- Top Weakness: **State budget cuts reduce workforce development options**
- Top Opportunity: **Development of health care courses at the university**
- Top Threat: **Increasing costs**

Visitor Industry

- Top Strength: **Natural beauty of region**
- Top Weakness: **Community communications**
- Top Opportunity: **Collaborate with Alaska Native entities on cultural tourism**
- Top Threat: **Viral outbreak**

Mining

- Top Strength: **Provides high paying jobs**
- Top Weakness: **Extreme opposition by environmental groups**
- Top Opportunity: **Explore and develop new mineral deposits and expand existing mines**
- Top Threat: **Lawsuits**

Timber

- Top Strength: **High quality wood**
- Top Weakness: **Frequency of litigation**
- Top Opportunity: **Increased state and private lands**
- Top Threat: **Environmental litigation**

Transportation

- Top Strength: **Strong reliable airline services**
- Top Weakness: **AMHS service reductions**
- Top Opportunity: **Improve ferry service**
- Top Threat: **Demise of AMHS**

Energy

- Top Strength: **Abundant hydropower**
- Top Weakness: **High costs of infrastructure**
- Top Opportunity: **New hydro development**
- Top Threat: **Economic downturn**

SOUTHEAST ALASKA Summary Background



The Summary Background is updated every September and released at the Southeast Conference Annual Meeting as Southeast Alaska by the Numbers.

CHANGES 2020 TO 2021

SOUTHEAST ALASKA'S ECONOMY



THE **LABOR FORCE**
INCREASED BY **2,100**
JOBS TO **42,275** JOBS,
+5%.



TOTAL WAGES
INCREASED BY **\$238**
MILLION TO \$2.4
BILLION, **+11%**.



AVERAGE REGIONAL
WAGE INCREASED BY
6% TO **\$56,605**
+\$2,970.



TOTAL **PASSENGER**
ARRIVALS INCREASED
BY **155%** TO **487,830**
(INCLUDES RESIDENTS).



OIL PRICES INCREASED
BY **71%** TO **\$71** PER
BARREL, **+\$29**.



POUNDS OF SEAFOOD
LANDED IN THE REGION
INCREASED BY **157**
MILLION POUNDS,
+145%.

2021 It is impossible to imagine a better year-over-year economic report than 2020 to 2021, due to the devastating economic conditions of 2020.

Jobs were up by 5% in 2021 overall while communities like Hoonah and Gustavus saw 18% and 19% job increases, respectively. Total wages were up by 11% (+\$238 million) – higher overall than 2019 regional earnings. The overall average regional wage increased by 6%.

After a terrible harvest by all measures in 2020, the seafood sector posted incredible gains, becoming the #1 private sector industry in the region for the first time since 2015. Total pounds landed were up by 145% in 2021, 157 million pounds more than in 2020. The value of seafood caught nearly doubled, and workforce earnings increased by \$120 million.

Even with just one-tenth of a normal cruise ship year, visitor industry numbers soared in 2021. Total passenger arrivals from outside the region went up by 155%, with visitor sector jobs up by 36%. The tourism payroll increased by \$74 million. Air passengers nearly doubled. Even population and school enrollment figures grew.

Despite impressive gains, by many measures the region still lagged behind 2019. Jobs remained 8% below 2019 annual job figures, and 18% below peak summer employment levels.

2022 Moving into 2022 and 2023 Southeast Alaska's businesses report tremendous optimism, and with good reason. The significant federal investments into the region in the form of COVID relief dollars worked as intended. Businesses, workers, and communities were able to continue in a stasis-like existence throughout the economically-impooverished early pandemic period, giving Southeast Alaska an economy to come back to in 2022.

In the first half of the year, the region added 1,100 jobs, and half of the region's business leaders expect their prospects to be even better or much better next year. Tourists have come back. The number of cruise passengers arriving in the region is on track to be at least 700% higher than 2021 levels, with a record-setting sailing schedule planned for 2023.

Salmon harvest levels are coming in even higher than in 2021. Mining jobs are up by 7% in 2022 so far, and construction jobs are up by 5%. The region is on-track to receive federal infrastructure dollars, but only if groups successfully apply for available funding.

Two threats are hampering regional recovery: the continued decline of the State sector – down by another 170 jobs in the first half of 2022 for a total decrease of 24% in the last decade – and difficulty attracting workers due to fierce competition nationally and a scarcity of housing within the region.

REGIONAL OVERVIEW

SOUTHEAST ALASKA

VIRTUALLY ALL OF THE REGIONAL LAND BASE IS FEDERAL. FEDERALLY-MANAGED TONGASS NATIONAL FOREST MAKES UP NEARLY 4/5TH OF ALL SOUTHEAST ALASKA LANDS.

78%
TONGASS

94%
FEDERAL
LANDS

16%

OTHER FEDERAL HOLDINGS MAKE UP NEARLY ALL THE REST (MOSTLY GLACIER BAY)

3.4%

ALASKA NATIVE ORGANIZATIONS ARE THE REGION'S NEXT LARGEST LANDOWNER

2.5%

STATE OF ALASKA LANDS INCLUDE THOSE MANAGED AS PART OF THE MENTAL HEALTH TRUST

0.25%

MUNICIPAL LAND HOLDINGS

0.05%

PRIVATE LANDOWNERS

Southeast Alaska Land Ownership

Circle size = Number of Acres

THE REGION

The Southeast Alaska panhandle extends 500 miles along the coast from Metlakatla to Yakutat, encompassing approximately 33,500 square miles of land and water. The saltwater shoreline of Southeast Alaska totals approximately 18,500 miles. More than 1,000 islands make up 40 percent of the total land area. The region is home to 34 communities. The three largest communities – Juneau, Ketchikan, and Sitka – together are home to 75 percent of the regional population.

CULTURE

The dominant culture in the region is indigenous. Alaska Natives – the Tlingit, Haida, and Tsimshian – make up more than a quarter (26%) of the region's population. The Tlingit have resided in the region for at least 11,000 years. The region's mild climate, abundant food and raw materials supported the development of highly-organized and culturally-advanced societies with extensive trade routes and rich artwork.

ECONOMIC TRENDS

Starting in the 1880s, the economy of Southeast Alaska experienced a century of growth that intensified after statehood in 1959. From statehood into the 1990s, population and employment levels in Southeast more than doubled as the workforce expanded in the areas of mining, government, fishing, tourism, and timber. In the beginning of the 1990's seafood and timber directly accounted for a fifth of the regional economy. Over the next decade pulp mills and sawmills in the region closed, laying off 3,200 workers. During the same period, the value of salmon declined and catch levels fell. The population continued to decline through 2007. Between 2008 and 2015, the region experienced a significant economic recovery, rebounding to record numbers of jobs, wages, and residents. However, the state budget crisis resulted in 24% of State of Alaska jobs cut across the region, reversing the economic trajectory. The strength of the visitor sector was poised to lead the region to a stronger economic position in 2020, but the COVID-19 pandemic wiped out the tourism season and an extremely poor 2020 salmon season exacerbated the economic impacts of the pandemic. Fortunately in 2022, jobs, tourists, fish, and wages are back, as the region works to regain its strength.

LAND OWNERSHIP

A lack of privately-owned land and land available for development is unique to Southeast Alaska and impacts the ability of the region to nurture the private sector. (See infographic on the left.) Southeast Alaska's land ownership is dominated by the federal government, which manages 94 percent of the land base. Most of this (78%, or 16.7 million acres) is the Tongass National Forest. The remaining federal lands are mostly in Glacier Bay National Park. Alaska Native organizations, including village, urban, regional corporations, and the Annette Island Reservation, own 3.4 percent (728,100 acres). The State manages 2.5 percent of the total land base (511,500 acres). Boroughs and communities own 53,000 acres—a quarter of one percent of the regional land base. Other private land holdings account for 0.05% of the regional land base.

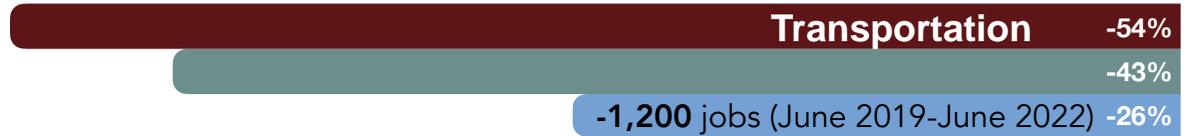
Sources: State of Alaska; US Forest Service; Sealaska. *Economies in transition: An assessment of trends relevant to management of the Tongass National Forest, USDA 1998.* Image Credits: Section of SHI clan house by David Boxley. Boat photo by Nick Starichenko.

Southeast June Pandemic Economics

Change in June Jobs compared to June 2019 Levels: **-5,200 jobs**

■ June 2020 ■ June 2021 ■ June 2022

June SE jobs down **12%** Over pre-pandemic levels



Despite the tremendous gains made since the early pandemic losses of 2020, by June 2022 the region remained more than 5,000 jobs below June 2019 levels, a 12% jobs deficit due to a lagging recovery in the tourism sector and public sector job cuts.

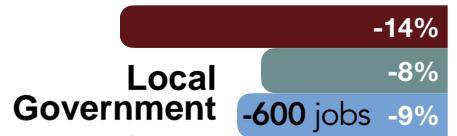
Comparatively, the US as a whole has fully recovered and was 1% above pandemic job rates in June, while Alaska remained 6% below 2019 employment.

After two years of reduced operations, the businesses that provide tourism services were unable to attract the staffing needed for peak summer visitor levels. The transportation sector remained 26% below 2019 levels, the leisure & hospitality sector was 15% below, and the retail sector 20% lower, for a combined visitor sector June jobs deficit of -3,100.

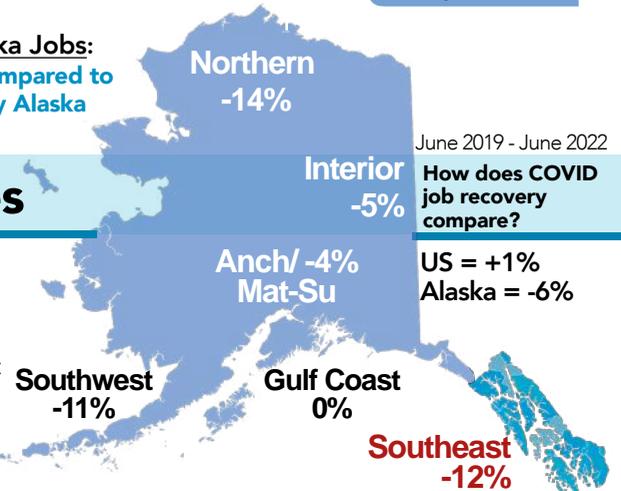
State government is the only sector that has significantly ramped up job cuts following peak pandemic losses. By June of 2022, state jobs were down by 13% over June of 2019, a loss of 600 jobs. Local government remains 600 jobs below 2019 staffing levels, and the federal government is 100 jobs behind, for a combined count of -1,300 jobs below June 2019 levels.

Other sectors still lagging by June 2022 include seafood (-300), and professional business services (-200). Sectors that have fully recovered from pandemic losses include the construction, mining, and financial activities sectors.

Note that 2022 numbers are preliminary. Self-employment data for this dataset is not available and has not been included in this analysis. Approximately one-fifth of Southeast jobs are independent workers, including sole-proprietors and commercial fishermen. It is assumed that these jobs were impacted at a similar rate.

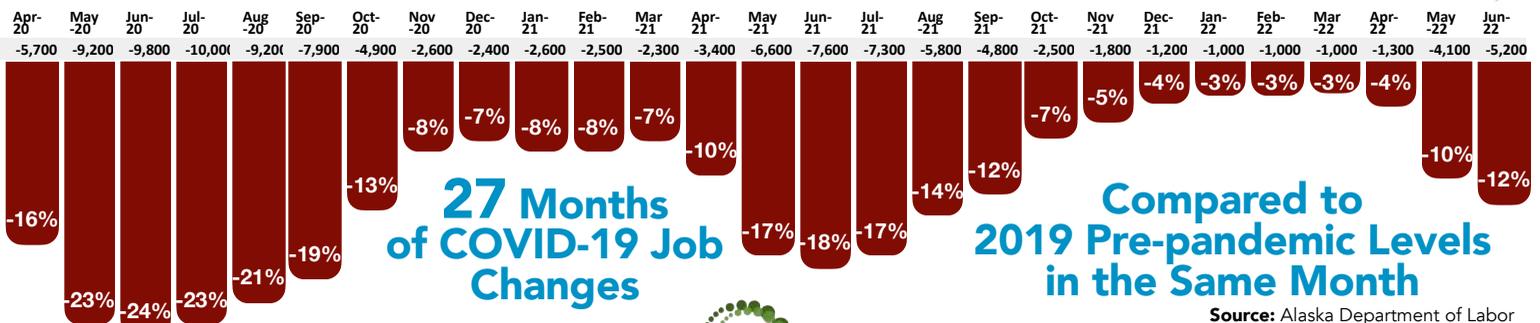


Loss of Alaska Jobs: June 2022 compared to June 2019, by Alaska region

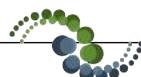


Southeast COVID-19 Employment Losses

Since the pandemic hit Alaska in March of 2020, jobs in the Southeast region have been down sharply, especially in the summer months. In June of 2020, the region was down by nearly a quarter of all jobs (24%) compared to June of 2019. By June of 2021, jobs were down by 18% over 2019 levels. December 2021 through April 2022 it had appeared that Southeast was in a strong recovery cycle, with jobs down just 3-4% over pre pandemic job rates. But as the visitor sector continued struggled to ramp up for the summer season, June 2022's jobs came in at 12% below 2019 levels.



Source: Alaska Department of Labor



CHANGE IN THE LAST YEAR: 2020 to 2021

Table tracks key Southeast indicators over the past year, along with associated changes.

DEMOGRAPHICS	2020	2021	% CHANGE 2020-2021	CHANGE 2020-2021
Total Population ¹	72,286	72,494	0.3%	208
Under Age 15 ²	13,087	12,796	-2%	-291
Twenty-somethings ²	7,931	8,012	1%	81
Ages 65 and older ²	11,808	12,627	7%	819
K-12 School District Enrollment ³	10,697	10,803	1%	105
GENERAL ECONOMIC CONDITIONS				
Total Labor Force (jobs, includes self-employed & USCG) ^{1,5,6}	40,187	42,275	5%	2,088
Total Job Earnings ^{1, 5, 6}	\$2.15 million	\$2.39 million	11%	\$238 million
Total Private Sector Payroll ^{1, 6}	\$1.37 billion	\$1.58 billion	16%	\$212 million
Average Annual Wage ¹	\$53,635	\$56,605	6%	\$2,970
Annual Unemployment Rate ¹	8.3%	6.1%	-2.2%	-2.2%
TOP ECONOMIC SECTORS				
GOVERNMENT	PUBLIC SECTOR: 34% OF ALL EMPLOYMENT EARNINGS			CHANGE
Total Government Employment ^{1, 5}	12,501	12,586	1%	85
Federal Employment ^{1, 5} (8% of all employment earnings)	2,074	2,037	-2%	-37
State Employment ¹ (14% of all job earnings)	4,438	4,403	-1%	-35
City and Tribal Employment ¹ (14% of all job)	5,989	6,146	3%	157
Total Government Payroll (includes USCG) ^{1, 5}	\$789 million	\$814.5 million	3%	\$25.6 million
State of Alaska Payroll ¹	\$278.9 million	\$287.6 million	3%	\$8.7 million
VISITOR INDUSTRY	KEY INDUSTRY: 9% OF ALL EMPLOYMENT EARNINGS			CHANGE
Total Visitor Industry Employment ^{1, 6}	4,599	6,252	36%	1,653
Total Visitor Industry Wages/Earnings ^{1, 6}	\$152.7 million	\$226.4 million	48%	\$73.7 million
Total Southeast Alaska Passenger Arrivals	191,138	487,831	155%	296,693
Cruise Passengers ¹⁰	48	124,600	259,483%	124,552
Total Air Passenger Arrivals from Outside SE ¹¹	188,443	357,222	90%	168,779
Total AMHS Passengers from Outside SE ¹²	2,647	6,009	127%	3,362
COMMERCIAL FISHING & SEAFOOD INDUSTRY	KEY INDUSTRY: 12% OF ALL EMPLOYMENT EARNINGS			CHANGE
Total Seafood Employment (includes fishermen) ^{1, 6}	3,305	3,919	19%	614
Total Seafood Employment Earnings ^{1, 6}	\$170.6 million	\$291 million	71%	\$120.4 million
Commercial Fishing Boats Homeported in SE ¹⁵	2,896	2,834	-2%	-67
Value of Seafood Processed ⁷	\$271 million	\$673.8 million	149%	\$403 million
Pounds Landed (commercial seafood whole pounds by SE residents) ⁸	108.8 million	266 million	145%	157 million
Estimated Gross Earnings (ex-vessel value of pounds landed) ⁸	\$148.4 million	\$291 million	96%	\$142.6 million
HEALTH CARE INDUSTRY (PUBLIC & PRIVATE HEALTH)	KEY INDUSTRY: 12% OF ALL EMPLOYMENT EARNINGS			CHANGE
Health Care Employment ^{1, 6}	3,675	3506	-5%	-169
Health Care Wages ^{1, 6}	\$248.6 million	\$249.7 million	0.4%	\$1.1 million
MARITIME ECONOMY (Includes employment from all industries)	KEY INDUSTRY: 13% OF ALL EMPLOYMENT EARNINGS			CHANGE
Private Maritime plus USCG Employment ^{1,5,6}	4,968	5,616	13%	648
Private Maritime plus USCG Wages ^{1,5,6}	\$289 million	\$416 million	44%	\$127 million
OTHER SELECTED STATISTICS				
	2020	2021	% CHANGE	CHANGE
Construction Employment ^{1, 6} (6% of all employment earnings)	1,946	2,026	4%	80
Mining Employment ¹ (5% of all employment earnings)	861	898	4%	37
Price of Gold ⁷	\$1,770	\$1,799	2%	\$29
Total Southeast AMHS Ridership ¹²	38,596	70,938	84%	32,342
Cost of Living: Consumer Price Index ¹	226.2	237.188	5%	11
Housing Units Permitted/Completed ^{4,1}	406	327	-19%	-79
Avg. Daily Volume ANS Oil Production (mbbls/day) ¹⁴	479,531	477,110	-1%	-2,421
Annual Avg. Domestic Crude WTI Oil Prices (in \$/Barrel) ¹⁴	\$41.67	\$71.10	71%	\$29

Sources: ¹Alaska Department of Labor (ADOL); ²ADOL Southeast Alaska Population by Age; ³Alaska Department of Education and Early Development; ⁴Based on the quarterly Alaska Housing Unit Survey, a survey of local governments and housing agencies; ⁵US Coast Guard; ⁶US Census Nonemployer (self-employment) Statistics and estimates based on business climate surveys; ⁷Kitco Metals Inc.; ⁸ADF&G Southeast Alaska Commercial Seafood Industry Harvest and Ex-Vessel Value Information; ¹⁰Cruise Line Agencies of Alaska; ¹¹US Bureau of Transportation Statistics (RITA); ¹²Alaska Marine Highway System data; ¹⁴Alaska Department of Revenue Crude Oil and Natural Gas Prices; ¹⁵Commercial Fisheries Entry Commission.

The Whole Southeast Alaska Economy 2021

In 2021, Southeast Alaska gained more than 2,000 year-round equivalent jobs and \$237 million in workforce earnings compared to 2020.

Annual Average Jobs

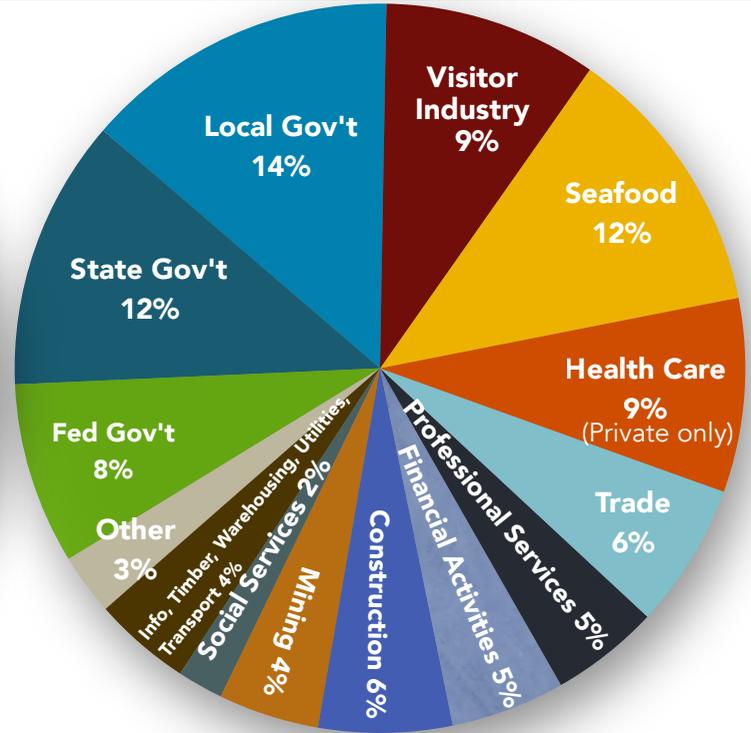
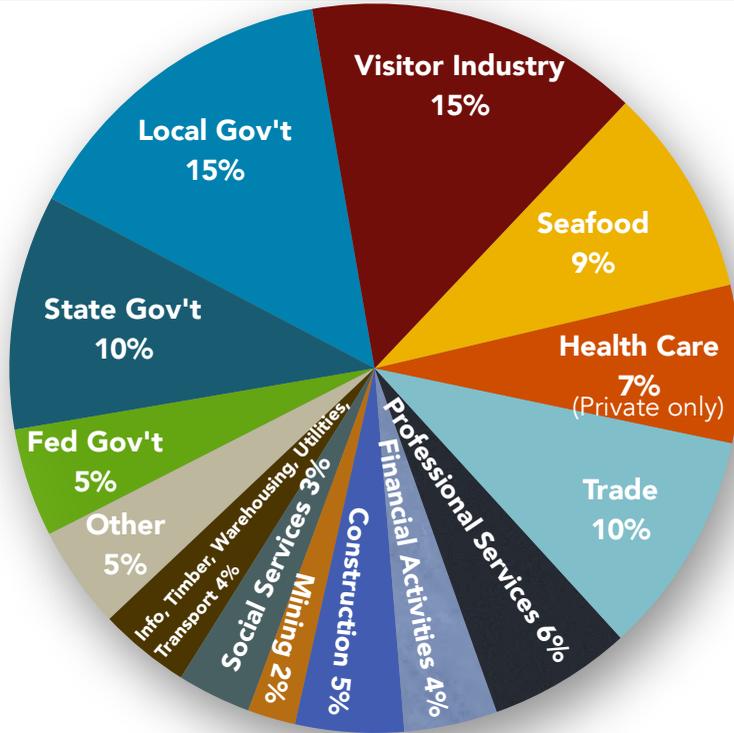
42,275 Jobs

UP 2,088 JOBS IN 2021 +5%

Employment Earnings

\$2.4 Billion Workforce Earnings

UP \$238 MILLION +11%

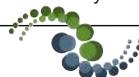


2021 Southeast Alaska Employment Earnings

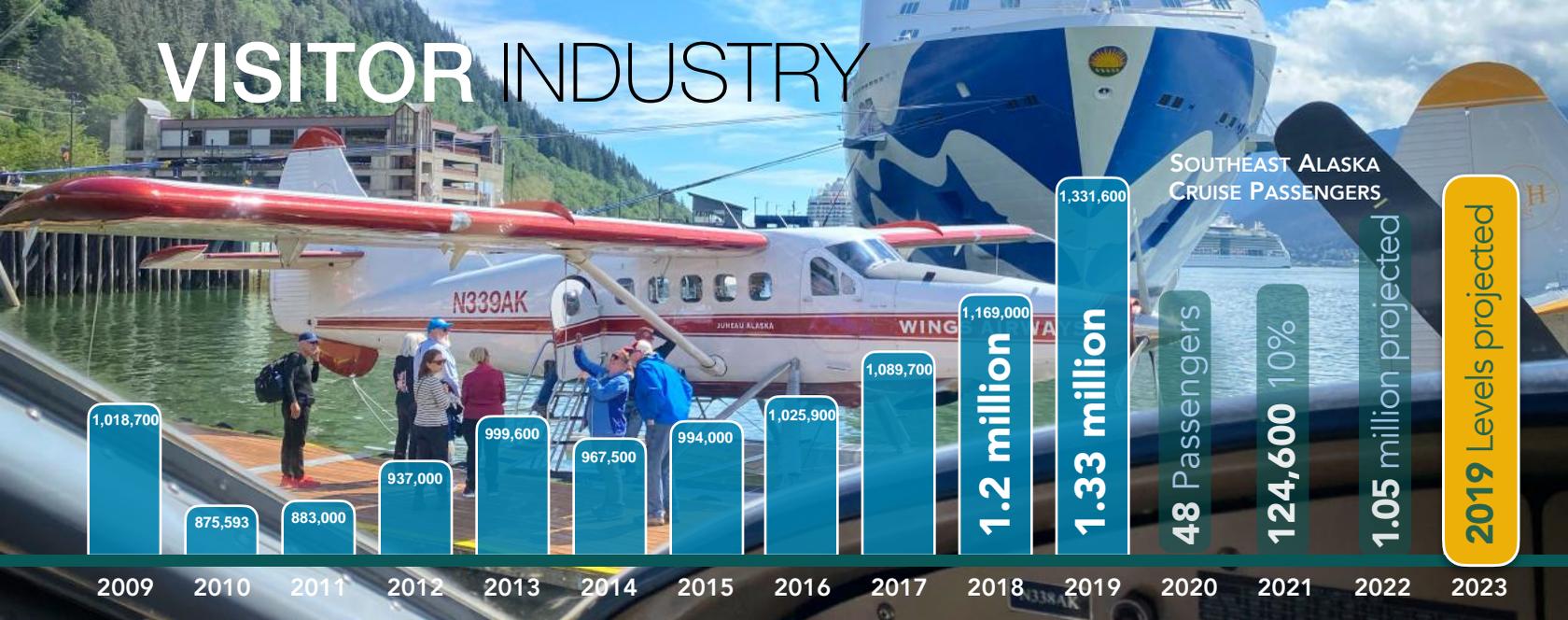
	EMPLOYMENT RELATED EARNINGS			EMPLOYMENT NUMBERS			Change 2020 to 2021
	Wages (2021)	Self-Employment Earnings (est.)	Total Earnings	Annual Average Employment (2021)	Self-Employed (est.)	Total Employment	
Government (includes Coast Guard)	\$749,887,721	\$64,646,233*	\$814,533,954	11,929	657*	12,586	85
Visitor Industry	\$196,067,364	\$30,341,488	\$226,408,852	5,469	783	6,252	1,653
Seafood Industry	\$92,651,604	\$198,344,892	\$290,996,496	1,679	2,240	3,919	614
Trade: Retail and Wholesale	\$128,929,349	\$25,009,551	\$153,938,900	3,669	533	4,202	71
Health Care Industry (private only)	\$189,915,853	\$15,826,369	\$205,742,222	2,700	254	2,954	28
Construction Industry	\$100,357,128	\$41,195,655	\$141,552,783	1,418	608	2,026	80
Financial Activities	\$62,370,465	\$58,606,668	\$120,977,133	1,022	726	1,748	-27
Professional and Business Services	\$74,460,205	\$40,837,367	\$115,297,572	1,476	1200	2,676	-49
Mining Industry	\$106,417,184	\$317,351	\$106,734,535	892	6	898	37
Social Services	\$44,373,522	\$4,197,084	\$48,570,606	1,199	183	1,382	28
Information (publishing, broadcasting, telecom.)	\$20,043,301	\$1,186,453	\$21,229,754	380	48	428	-3
Timber Industry	\$16,913,017	\$1,683,173	\$18,596,190	264	48	312	-9
Warehousing, Utilities & Non-Visitor Transportation	\$49,886,259	\$13,578,805	\$63,465,064	809	161	970	-13
Other	\$38,130,674	\$26,806,275	\$64,936,949	999	924	1,923	-405
Total	\$1,870,403,646	\$522,577,366	\$2,392,981,012	33,905	8,370	42,275	2,088

Sources: Alaska Department of Labor Employment & Wage data; (latest available) US Census Nonemployer (self-employment) Statistics; Active Duty Military Population, ADOL.

*These cells in Government refer to active duty Coast Guard personnel employment and wages, and not self-employment data. Notes: Seafood Industry includes animal aquaculture, fishing & seafood product preparation, and Southeast Alaska resident commercial fishermen (nonresident fishermen & crew who did not report income are excluded). Visitor Industry includes leisure & hospitality, and visitor transportation (air, water, scenic). Timber includes forestry and logging support activities for forestry, and wood product manufacturing.



VISITOR INDUSTRY



Visitor Industry

6,252 Annualized Jobs
\$226 Million in Wages in 2021

UP 1,652 JOBS IN 2021

2021 It took federal action temporarily suspending the

Passenger Vessel Services Act to allow cruise ships to bypass Canada and visit Alaska in 2021. While the cruise season was abbreviated, attracting just 10% of the average 2018/2019 cruise passenger levels, it helped keep the regional tourism economy from disintegrating.

In 2021, visitor sector jobs increased by 36% over 2020 to 6,252, and wages increased by \$74 million. Those working in the visitor industry earned \$226 million in 2021, comprising 9 percent of all regional employment income (a drop from 2019 when it was 12 percent).

Just under a half million passengers arrived in Southeast Alaska by air, ferry, and cruise ship in 2021. Airline and ferry passenger traffic to the region doubled and cruise passenger numbers grew from 48 in 2020 to 124,600.

2022 BUSINESS LEADERS SURVEY

In April 2022, business leaders in the visitor sector reported on the economic health of their organizations. Leaders from the tourism and food/beverage sectors reported a strong 2022 economic climate. The majority (60%)

expect their business operations to be even stronger headed into 2023 -- the most positive outlook of any industry in the region, including 27% saying their outlook is **much** better for the coming year. Last year one-third of tourism business leaders said they were at risk of closing permanently in 2021.

FIRST NORMAL CRUISE SEASON IN 3 YEARS

Cruise tourist numbers ricocheted dramatically, from 1.3 million in 2019 to 48 in 2020 to 124,600 passengers in 2021. While vessels have been approximately 70% full in 2022, a shift to larger ships and increased voyages means an expected 1.05 million cruise ship visitors will visit the region this summer, making it one of the top years for total cruise passengers.

TOURISM JOBS ARE STILL LAGGING

Developing enough capacity to serve this number of visitors after two years of little to no tourism has been a significant challenge for regional businesses. In a typical year Southeast businesses increase their labor force by 8,000 workers in the summer months, relying on long-term relationships to ramp up these employment numbers on an annual basis. In 2022, however, these worker supply chains had been broken and regional employers have been competing in one of the strongest national job markets in the last 50 years.

In June of 2022, tourism jobs were up by 20% over June 2021 as 2,000 more tourism workers flooded back into the region. Despite these significant gains, June jobs remain 3,100 workers below 2019 levels. The

following quote from a tourism business leader is indicative:

"We are experiencing more demand than we can accommodate. With less long-term staff after the pandemic, rebuilding is challenging due to competitive hiring environment, housing expense/availability & transportation challenges."

JET PASSENGERS

Despite nearly doubling in 2021 over 2020, by June 2022 total air passenger arrivals for the region were still 8% below 2019 levels. However, strong arrival numbers and events like IRONMAN Alaska are expected to continue to shrink this disparity.

2023 STRONG TOURISM SEASON EXPECTED NEXT YEAR

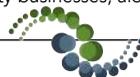
Moving into 2023, regional cruise ship passengers numbers are expected to be similar to the 2019 season. Of course pandemic-related uncertainty remains, but 2023 should bring back pre-pandemic visitor levels and is likely to be one of the strongest visitor seasons ever.

2023 CRUISE SCHEDULE

Total ships	40+
Total voyages planned	693
First ship	April 17
Last ship	October 27

The 2023 cruise ship season is expected to run more than six months -- mid-April though the end of October -- with more than 40 ships making nearly 700 voyages to the region, up from 677 in 2022 and 107 in 2021.

Sources: CLIA Alaska & Cruise Line Agencies of Alaska. Combination of ADOL Employment and Wage data and US Census Nonemployer (self-employment) Statistics; Alaska Visitors Statistics Program (AVSP) VII; US Bureau of Transportation Statistics (RITA); Alaska Marine Highway System; Juneau International Airport Passenger Statistics; Juneau Docks & Harbors capacity figures. **Note:** In this analysis, the visitor industry includes leisure and hospitality businesses, along with air, water & scenic transportation companies.



GOVERNMENT



Government Jobs 2021
Municipal 5,034 Jobs **+37**
State 4,403 Jobs **-35**
Federal 2,037 Jobs **-37**
Tribal 1,112 Jobs **+120**

=34%
 Government wages as a percentage of all Southeast employment earnings in 2021

Government

12,586 Annualized Jobs in 2021, 5,600

UP 85 JOBS IN 2020

WAGES UP BY 3%

2021

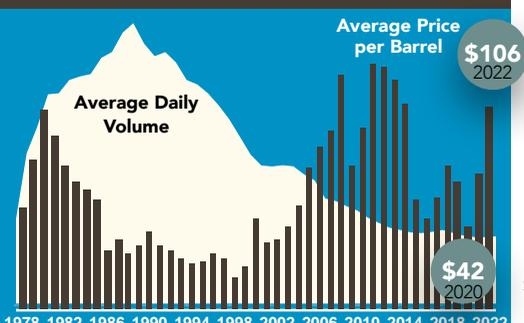
Government wages made up 31% (12,586) of the region's jobs in

2021, and 34% of all regional employment earnings (\$815 million). Overall public sector wages grew by \$25.6 million in 2021, an increase of 3%, while government jobs grew by less than one percent.

STATE GOVERNMENT LOSSES

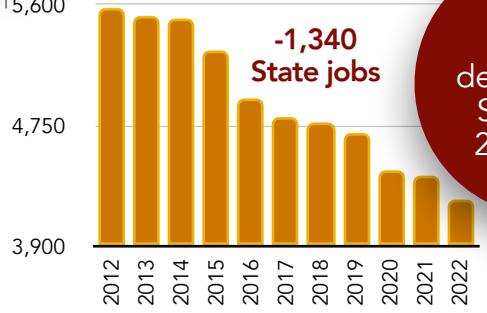
For the past ten years, the region's state government sector has suffered from a systematic hollowing out of Southeast jobs. From 2012 to 2022, state jobs have fallen by nearly a quarter, a decline of 1,340 annualized workers, representing \$88 million in lost wages annually. The following department have been impacted the most: Public Safety **-65%** of regional State jobs; Court System **-62%**; Transportation **-56%**;

Avg. Daily Volume of the Trans Alaska Pipeline System and Inflation Adjusted Price Per Barrel, 1978-2022



Southeast State Jobs

State jobs in the region are down for the 9th year in a row, for a total of 1,340 jobs lost since 2012, a decline of 24%



24%
 decline in SE State jobs 2012-2022

University of Alaska **-53%**, and Education **-49%**. While in Southeast 24% of State of Alaska jobs have been cut since 2012, outside the region State jobs were down by the significantly smaller amount of 11%.

HIGH OIL PRICES

The State of Alaska has operated in deficit mode without a fiscal plan for the past ten years, using \$19.6 billion from savings accounts to cover budget gaps. In 2022, relief was provided in the form of high oil prices, rising from \$42 per barrel in 2020, to an average of \$106 per barrel in the first seven months of 2022, resulting in a significant, but mercurial, increase to the state general fund. Meanwhile the Alaska Permanent Fund – the source of more than half of Alaska's general fund revenue – posted negative returns for the first time since 2012.

FEDERAL GOVERNMENT

In 2020 the regional economy crashed, and the federal government provided

approximately \$600 million in COVID-19 relief funds in the form of grants and loans to the region. This funding was funneled directly to regional households, businesses, service providers, tribes, and communities, and proved to be instrumental in restoring economic stability. Continued federal expenditures in the form of infrastructure and broadband investments will further fuel the economy.

Following the culmination of US Census 2020 activities, federal employment was down by 37 jobs in 2021.

MUNICIPAL GOVERNMENT

After a 5% loss in 2020, local government employment was almost flat in 2021, up by 37 jobs. For the first half of 2022, employment numbers are down by 17 jobs.

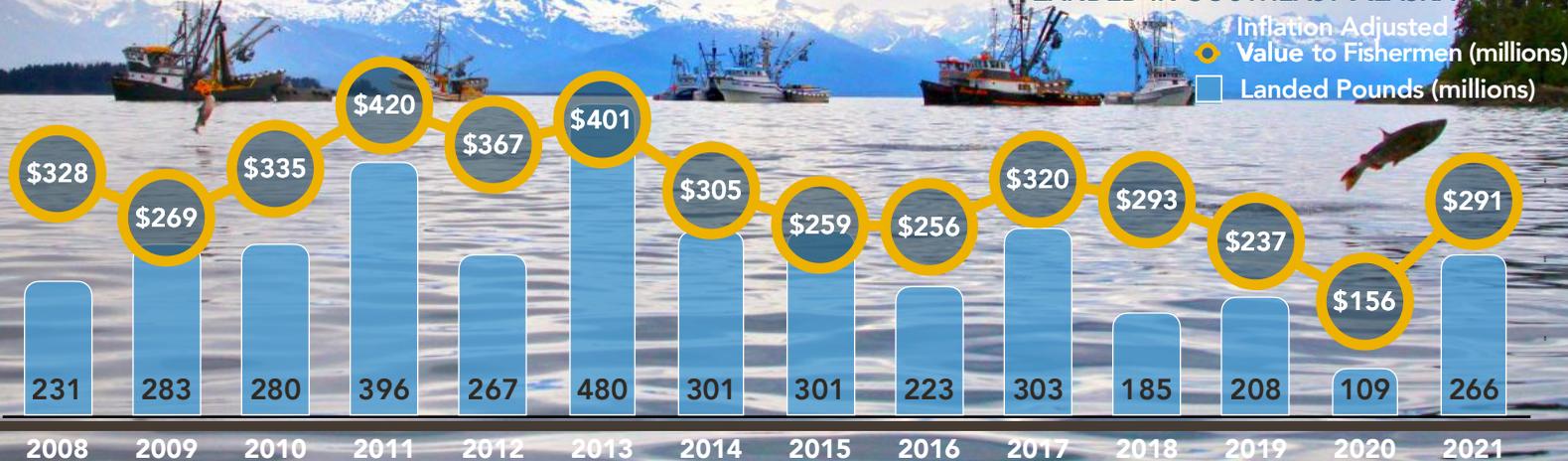
GROWING TRIBAL GOVERNMENT

While state and federal government jobs have been declining, and municipal jobs have been flat, tribal government has been growing. In the past five years tribal government staff has grown by 24% – by more than 200 jobs – to 1,112 annualized workers. Tribal government wages increased by 54% over the same period, to \$58.6 million. Tribal government now makes up 9% of all government jobs in the region, and 3% of all Southeast jobs.

Sources: ADOL Employment and Wage data; Alaska Department of Revenue Crude Oil Prices. Alaska Office of Management Budget. Photo credit: US Forest Service.

SEAFOOD INDUSTRY

VALUE & POUNDS OF SEAFOOD LANDED IN SOUTHEAST ALASKA



Seafood Industry 3,920 Annualized Jobs 2021

UP 614 JOBS IN 2021
EARNINGS UP BY 71%

2021 For the first time since 2015, the seafood sector was the top private sector wage provider in the region in 2021.

The Southeast Alaska 2020 seafood harvest was one of the worst on record, contributing to the economic devastation of 2020 for the region. By contrast, the 2021 season was slightly better than the 10-year-average, both for pounds landed and inflation adjusted catch value. In 2021, regional fishermen caught 266 million pounds of seafood, with a value of \$291 million. The 10-year-average is 264 million pounds, and a value of \$289 million.

Fishermen caught 157 million more pounds of seafood than they did in 2020. This includes 106 million more pounds of pink salmon, 31 million more pounds of herring, and 14 million more pounds of chum.

The gross value of the 2021 catch was 87% higher than the previous year, or \$142 million more. The 2020 catch value of \$136 million was less than half of the

inflation-adjusted 10-year average value. Gross total earnings are estimated using average annual ex-vessel prices for each area by species, gear, and delivery type.

More than half of total employment earning gains for the region across all economic sectors in 2021 was due to the return to average harvest levels from the abysmal 2020 catch.

In 2021, the five salmon species represented about three-quarters of the regional seafood catch by pounds landed, but about half the total value. Halibut, black cod, crab, and the dive fisheries accounted for nearly half of total catch value in 2021 (43%), but just 10% of pounds landed. Typically, the majority of the statewide catch of Chinook, coho, chum, shrimp, Dungeness crab, and the dive fisheries occurs in Southeast Alaska.

KEY ECONOMIC DRIVER

The regional seafood industry (including commercial fishing and seafood processing) generated 3,920 annual regional jobs and \$291 million in earnings in 2021, making up 12% of jobs and earnings in the region. This represents a gain of more than 600 jobs and \$120 million in workforce earnings compared to 2020.

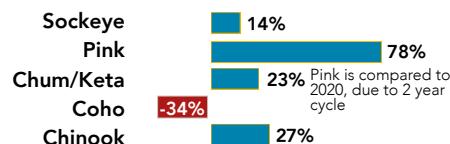
In 2021, shore-based seafood facilities in Southeast Alaska processed 236 million pounds of seafood, with a wholesale value of \$674 million. This represents a more than three-fold increase in seafood pounds processed compared to 2020, and a \$403 million increase in the value of processed product.

2022 The 2022 harvest-to-date has been even stronger. In ASMI's August 2022 update, salmon harvests are 50% than 2021. The pink harvest is expected to be double 2020 levels.

THE 2021 SOUTHEAST CATCH COMPARED TO THE 2020 CATCH IN MILLIONS

Species	2020 Pounds Landed	2021 Pounds Landed	2021 Catch Value	2021 Increase in Value
Pink Salmon	28.3	134.3	\$54.3	\$44.6
Chum Salmon	34.8	49.2	\$51.7	\$32.9
Halibut	6.8	7.8	\$49.6	\$21.6
Black Cod	9.7	12.3	\$38.3	\$11.9
Coho Salmon	7.4	9.2	\$19.3	\$6.4
Crab	10.3	7.3	\$36.4	\$6.9
Geoduck, Sea Cucumbers, Urchins	2.3	2.6	\$17.6	\$8.9
Chinook	2.5	2.5	\$15.4	\$2.0
Sockeye Salmon	2.3	6.4	\$12.1	\$8.2
Herring	1.8	32.6	\$5.9	\$2.8
All Other	5.1	4.3	\$5.9	-\$1.7
Pounds	108 million	266 million	\$291 million	\$142 million

SE Salmon Catch: 2021 vs. 2022 Year over year: week 33



While the sector faces uncertainty due to changing ocean conditions, tariffs, state budget cuts, and global farmed seafood competition, this season's good prices, increased jobs, better than average harvest, and mariculture investments are all good news for the regional seafood industry.

Sources: Combination of ADOL Employment and Wage data; US Census Nonemployer (self-employment) Statistics; ADF&G Seafood Production of Shorebased Plants in Southeast Alaska; ADF&G Southeast Alaska Commercial Seafood Industry Harvest and Ex-Vessel Value Information; Alaska Commercial Salmon Harvests and Ex-vessel Values, ADF&G. Weekly Alaska Salmon Harvest Updates are produced for ASMI by McKinley Research. **Seafood Industry** includes animal aquaculture, fishing, & seafood product preparation and Southeast Alaska resident commercial fishermen (nonresident fishermen & crew who did not report income are excluded). **Photo by Jim Beedle.**



Timber Industry

312 Annualized Jobs in 2021

DOWN 9 JOBS IN 2021

WAGES DOWN BY 8%



2021

These have not been good years for the regional timber industry. Timber jobs decreased by 9 jobs in 2021 to

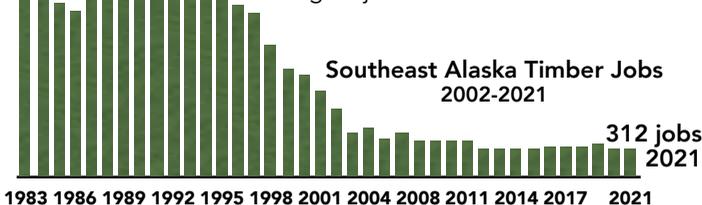
312 annualized workers – the lowest timber employment level ever recorded—while total wages dropped by 8%. Southeast timber jobs peaked at 3,543 annual average jobs in 1991 and have fallen by 91% since that time. Most of the region's timber jobs are now concentrated on Prince of Wales Island, home to Viking Lumber, the last remaining mid-sized sawmill in Southeast Alaska.

The Roadless Rule: For more than two decades, the timber industry in the region has operated under uncertainty of supply complicated by prohibitions on timber harvest and road construction with limited exceptions. In late 2020 the Alaska Roadless Rule Exemption was briefly reinstated; however, in July 2021 the US Department of Agriculture restored the 2001 Roadless Rule in the Tongass, ending the Alaska exemption before it had been re-implemented, while committing at least \$25 million to the region as part of its Southeast Alaska Sustainability Strategy.

Also in 2021, Sealaska Corporation, which had played a major role in the region's timber economy for 42 years, announced a transition away from the old growth logging to focus on ocean-based food and tourism opportunities.

3,543 peak jobs 1991

One community has been growing its timber sector. Yak Timber recently restarted its timber operations, along with making cabins and tiny homes, creating 26 jobs in Yakutat.



Sources: ADOL Employment and Wage data; Kitco Metals Inc; Coeur Mining Inc. Annual Report; Hecla Mining Company Annual Report. U.S. International Trade Commission. **Photo credits:** Ansley Dahlstrom and Kensington Mine.

Mining Industry

898 Annualized Jobs in 2021

UP 37 JOBS IN 2021, WAGES UP BY 3%

2021

The mining sector is growing steadily. Mining jobs in Southeast Alaska were up by 4% in 2021, with a payroll of \$107 million. The average annual mining wage was \$119,000 in 2021, more than double the overall regional wage of \$56,605.

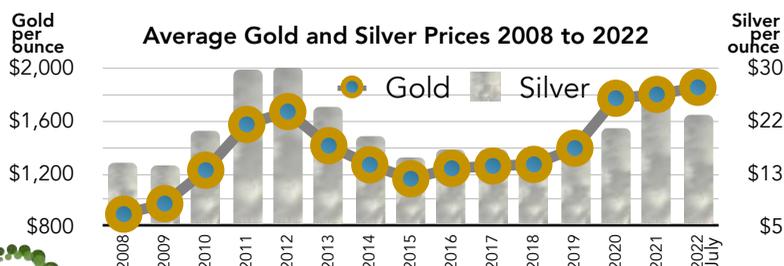
Three mines in the region account for nearly all mining employment.

- **Hecla Greens Creek** is one of the largest silver mines in the world. In 2021, Greens Creek had a production of 9.2 million ounces of silver, 46,088 ounces of gold, and 53,648 tons of zinc. In August 2022, Hecla Greens Creek had 474 full-time permanent employees (+24 from 2021), and reported \$23.9 million in infrastructure improvements and expansion investments.
- **Coeur Alaska's Kensington Mine** is exclusively a gold mine. Kensington had a production of 121,000 ounces of gold in 2021. Coeur Alaska Kensington had a full-time permanent staff of 403 (+20 from 2021).
- **Dawson Mine** is a smaller gold and silver project on Prince of Wales. Dawson Mine reported 54 full-time workers in 2022 (+14 from 2021).

Several mining exploration projects are active in the region, including the Palmer Project in Haines, Herbert Gold in Juneau, Bokan Mountain, and Niblack, both on Prince of Wales.

2022

Mining jobs in Southeast Alaska have increased by 7% in the first half of 2022. Metal prices, which rise in response to economic turmoil, have continued to be strong. Higher precious metals values provide ongoing optimism for this sector.





Construction Industry

2,026 Annualized Jobs in 2021

JOBS UP 80 IN 2021, WAGES UP BY 6%

2021 For the second year in a row, construction employment was up in 2021. Jobs in this sector increased by 80 workers, a four percent increase due to the prioritization of construction projects during the pandemic. Construction workers in the region earned \$142 million in 2021, an increase of six percent over the previous year. Construction represented six percent all workforce earnings, helping to stabilize the larger economy.

Despite business leader concerns regarding the lack of regional housing, housing construction was down in 2021 to its lowest point in 10 years, as 327 new units were permitted or completed across the region.

2022 Early data shows that 70 construction jobs were added in the first half of 2022, a 5% increase. The Federal Infrastructure Investment and Jobs Act, passed in 2021, will fund projects in Southeast Alaska and lead to five years of sustained growth in the construction sector. By August 2022, awards totaling \$22 million for work in 27 Southeast communities had already been announced, with the potential for hundreds of millions more **if organizations and communities successfully apply for available funding** to support the region's roads, bridges, ports, airports, energy grids, communication systems, and ferries. About \$1 billion has been set aside to support essential ferry service in rural communities, which will provide funding to the Alaska Marine Highway System. In Southeast in 2022, a partial list of grants for federal funding (infrastructure act and otherwise) includes:

- Prince of Wales: \$29.3 million to expand fiber optic network
- Regional airports: \$14.6 million
- Sitka: \$7.8 million for Sitka's Marine Service Center
- Petersburg: \$6.4 million for harbor work
- Ketchikan: \$4 million for Coast Guard facility improvements
- Metlakatla: \$0.4 million for bus service
- Haines: \$1.2 million for roadway repairs.

Sources: Combination of Alaska Department of Labor Employment and Wage data and US Census Nonemployer (self-employment) Statistics; State of Alaska.

Photography credit: SEARHC

Health Care Industry

3,506 Annualized Jobs in 2021

JOBS DOWN 169 IN 2021 WAGES UP BY 0.4%

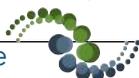
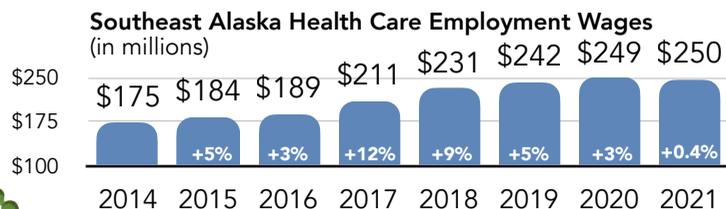
2021 Southeast Alaska's 3,506 public and private healthcare workers comprised 10% of the regional workforce in 2021 (including public sector health care jobs), earning 11% (\$250 million) of all wages.

However, while nearly every sector in Southeast increased jobs in 2021 over 2020, the health care sector posted declining jobs, a 5% loss of 169 annualized jobs in 2021. But as wages have been continuing to increase in an effort to compete for workers, total earnings for the industry were actually up in 2021 by 0.4%.

The decline of health care jobs in 2021 is part of a larger trend. Since 2018, the region has lost nearly 500 annualized health care workers, a 12% drop in the total workforce. The region was already facing a shortage of health care workers pre-pandemic due to an aging populace, growing patient volumes, and cuts to University of Alaska health care workforce programs. The demand for health care workers has intensified nationally and globally, making it even more difficult to attract and compete for workers. Health care worker vacancies have been increasingly harder to fill. The business leader quote below reflects on this:

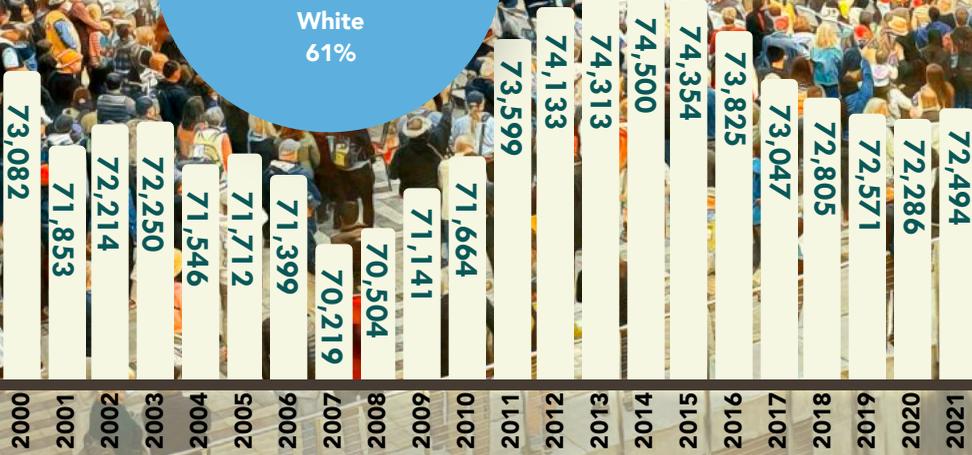
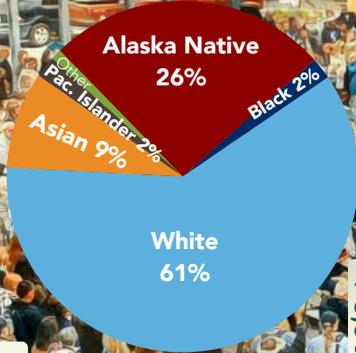
"We are having significant challenges providing healthcare and social services to patients and clients due to a lack of workforce. While this issue is affecting businesses nationwide, the challenge is exacerbated in Southeast by lack of affordable housing, lack of child care, and high cost of living."

The SouthEast Alaska Regional Health Consortium (SEARHC) is the region's largest health care provider, employing 35% of all regional health care workers. SEARHC has been expanding its operations, growing to 1,230 employees in 2022, an 8% increase from 2019. Early data indicates that 2022 regional health care job numbers will be similar to 2021 levels.



DEMOGRAPHICS

Population 72,494



POPULATION CHANGE 2020 TO 2021

Community	2020	2021	Change
Juneau Borough	32,255	32,155	-0.3%
Ketchikan Borough	13,948	13,895	-0.4%
Sitka Borough	8,458	8,387	-1%
Petersburg Borough	3,398	3,368	-1%
Haines Borough*	2,080	2,614	26%
Wrangell Borough	2,127	2,096	-1%
Metlakatla	1,454	1,403	-4%
Skagway Borough	1,240	1,203	-3%
Craig	1,036	969	-6%
Hoonah	931	902	-3%
Klawock	720	709	-2%
Yakutat Borough	662	697	5%
Gustavus	655	658	0.5%
Kake	543	557	3%
Thorne Bay	476	456	-4%
Hydaburg	380	376	-1%
Angeon	357	360	1%
Coffman Cove*	127	187	47%
Hollis*	65	138	112%
Naukati Bay	142	137	-4%
Tenakee Springs	116	122	5%
Pelican	98	92	-6%
Klukwan	87	88	1%
Whale Pass	86	84	-2%
Port Alexander	78	61	-22%
Kasaan*	30	46	53%
Hyder	48	42	-13%
Edna Bay*	25	40	60%
Port Protection	36	35	-3%
Elfin Cove	24	32	33%
Game Creek	23	19	-17%
Point Baker	12	10	-17%
Remainder	569	556	-2%
Total	72,286	72,494	0.3%

2021 After six consecutive years of population loss, the population of the region increased by over 200 people in 2021.

Unfortunately, this does not appear to represent actual gains, but a readjustment by the Alaska Department of Labor (ADOL), concerned about accuracy of the 2020 US Census figures for Haines, Hollis, Coffman Cove, Kasaan, and Edna Bay. Of the region's 32 communities, 20 lost residents in 2021. It is more accurate to estimate a loss of approximately 500 residents in 2021.

The primary element fueling the population losses — the 24% reduction in state jobs — is intensifying, and ADOL is projecting continued population declines in future years. Housing shortages and costs also contribute to population declines. However, robust job growth in the private sector will offset some of these losses.

SCHOOL ENROLLMENT UP

In 2021, for just the 4th time in 25 years, K-12 enrollment was up. School districts across the region added more than 100 new students, as students continue to return to the classroom following the rise of homeschooling

during peak-pandemic. Schools remain more than 500 students below 2019 levels.

MORE THAN ONE-QUARTER ALASKA NATIVE

The 2020 US Census shows a larger indigenous population than in previous census years. The Alaska Native population grew to 26% of all residents, for a total of 18,500 Alaska Native residents.

AN AGING DEMOGRAPHIC

Southeast continues to have the state's oldest residents. Since 2000, the most pronounced demographic shift has been the aging of the population. During that period, the 60-plus population grew by more than 10,000 people, from 10% of the overall population to a quarter. At the same time the number of those aged 18 and under decreased by 4,400. The median age is 41, while in Hoonah and Angeon the median age is 51.

SE Population by Age, 2000-2020



Sources: Alaska Department of Labor (ADOL); ADOL Southeast Alaska Population by Age, Sex and Borough/Census Area; Alaska Population Projections; US Census. *ADOL is questioning 2020 US Census figures for some communities.



Jobs by Community

ANNUAL EMPLOYMENT CHANGE BY COMMUNITY 2020 TO 2021

Looking at all communities across Southeast in 2021, job counts were mostly up compared to 2020, but the recovery has been uneven.

Communities with the largest 2020 to 2021 job gains percentage-wise include Klukwan (+21%), Gustavus (+19%), and Hoonah (+18%). The largest increases in total wages were seen in Petersburg (+31%), Angoon (+26%), and Hoonah (+19%).

Four areas experienced continued job losses in 2021 compared to 2020, including Hyder (-33%), Prince of Wales (-2%), Wrangell (-2%), and Metlakatla (-1%); however both Prince of Wales and Wrangell saw overall wage gains during the same period.

Still, regional job rates remained below 2019 levels for most communities in 2021. Skagway's jobs remained 42% below 2019 levels. Three communities defied the odds and had more jobs in 2021 than they did in 2019. These include Yakutat (+19%), Petersburg (+11%), and Gustavus (+3%).

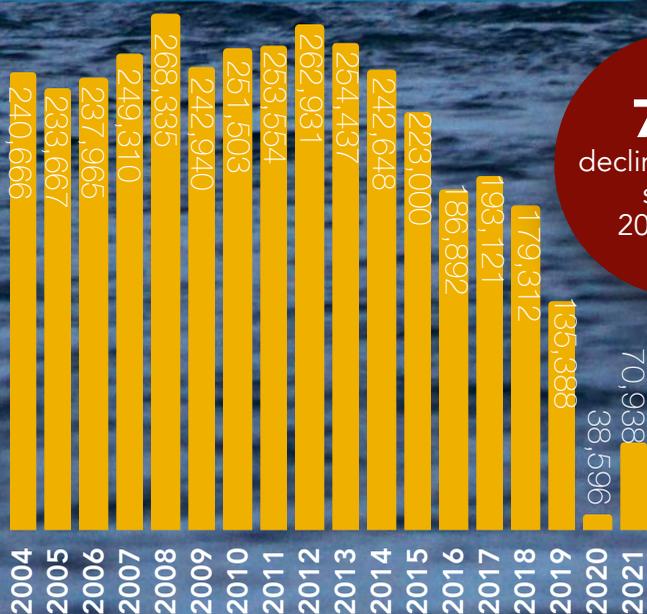
Community	2020 Annual Average Employment	2021 Annual Average Employment	2021 Wages in millions	Wages Change 2020-2021	Employment Change 2020-2021	Employment Change 2019-2021
Juneau	15,856	16,450	\$986.3	5%	4%	-8%
Ketchikan	6,309	6,492	\$349.1	5%	3%	-12%
Sitka	3,752	4,133	\$216.4	12%	10%	-4%
Prince of Wales	1,432	1,410	\$64.4	3%	-2%	-8%
Petersburg	1,238	1,419	\$72.6	31%	15%	11%
Haines	773	813	\$34.1	9%	5%	-21%
Wrangell	725	712	\$32.7	1%	-2%	-14%
Skagway	563	623	\$29.6	11%	11%	-42%
Metlakatla	497	493	\$23.7	-1%	-1%	-2%
Hoonah SSA	328	388	\$16.7	19%	18%	-10%
Yakutat	298	334	\$18.9	17%	12%	19%
Gustavus SSA	178	211	\$9.8	17%	19%	3%
Kake	166	166	\$5.7	2%	0%	-1%
Angoon SSA	133	145	\$4.5	26%	9%	-6%
Hyder	51	34	\$2.2	-25%	-33%	-35%
Klukwan	38	46	\$1.0	16%	21%	-10%

Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section.

Notes: The Hoonah sub-subarea (SSA) includes Pelican and Elfin Cove. The Angoon SSA includes Tenakee Springs. Prince of Wales includes the Hollis SSA, Thorne Bay SSA and Hydaburg. An SSA is the smallest unit for which the Quarterly Census of Employment and Wages is analyzed.

Note: This analysis excludes self-employment data, which is not made available below the borough/census area level. Still, tracking change in labor figures is an important way to track overall workforce changes in a community.

AMHS Ridership in Southeast



73%
decline in AMHS
service
2012-2021

Ferry connectivity, long been identified as the most vulnerable element of the regional economy, has been cut dramatically over the past decade.

The Alaska Marine Highway System (AMHS) ferried 262,931 individuals in the region in 2012. By 2021, that figure had dropped by 73%.

In 2020, COVID-19 travel stoppages reduced the number of sailings and travelers to a historic low of 38,596. In 2021, ferry service increased from 2020 levels to approximately half of 2019 levels.

Alaska is well-positioned to capture more than \$1 billion in federal funding for ferries from the infrastructure bill. If successful, this funding could help increase service levels.

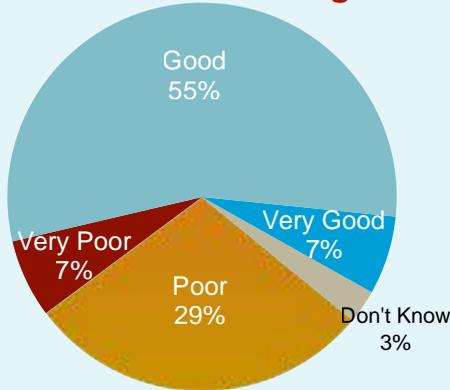
Source: AMHS.

Photo by Jim Beedle

SOUTHEAST ECONOMIC OUTLOOK SURVEY

“How do you view the overall business climate right now?”

62% Positive / 36% Negative



BEST BUSINESS CLIMATE SINCE 2017

In April and May of 2022, 440 Southeast Alaska business owners and top managers responded to Southeast Conference’s Business Climate Survey.

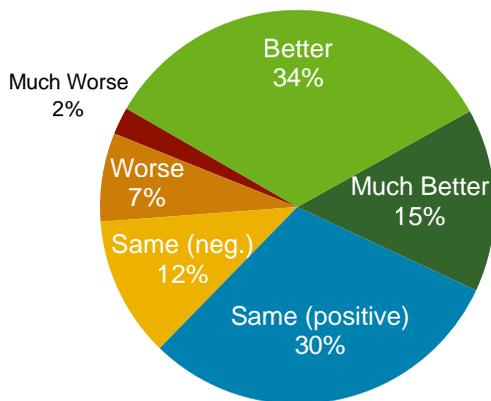
What a difference a year makes. A year ago, 80% of business leaders called the business climate “poor” or “very poor” (which was an improvement over 2020).

In 2022, nearly two-thirds (62%) have a positive view of the Southeast business climate, **making it the best business climate since 2017.**

While all sectors and communities have a positive perspective on the current economy, **those in small rural communities were the most likely to say that the regional economy is very good.**

“What is the economic outlook for your business or industry over the next year (compared to the previous year)?”

79% Positive / 21% Negative



THE OUTLOOK IS EVEN BETTER

Almost half of respondents expect their prospects to be better (34%) or much better (16%) over the next year, with an overall positivity rate of 79%, **making this the most positive outlook recorded.**

The economic outlook for the tourism and food/beverage sectors are most positive moving into 2023, followed by retail.

The community with the most positive outlook is Hoonah, followed by Skagway and Sitka.

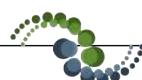
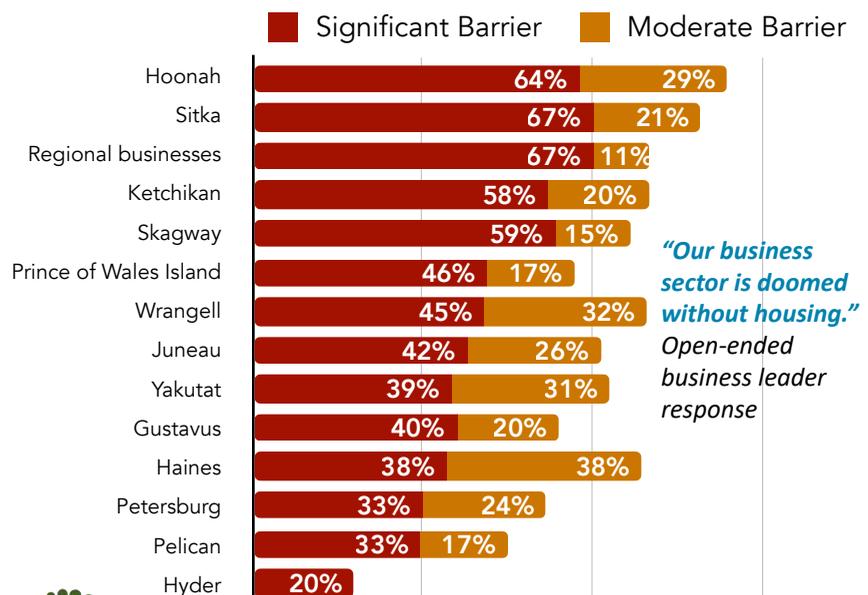
“How does housing availability impact your business in Southeast Alaska?”

HOUSING IS A WORKFORCE PROBLEM FOR BUSINESSES

If there was a theme of this year’s business climate survey, it was this: economic expansion in Southeast Alaska is limited by a lack of housing availability paired with prohibitive pricing, directly contributing to worker shortages. The primary problem, according to business leaders, is two-fold:

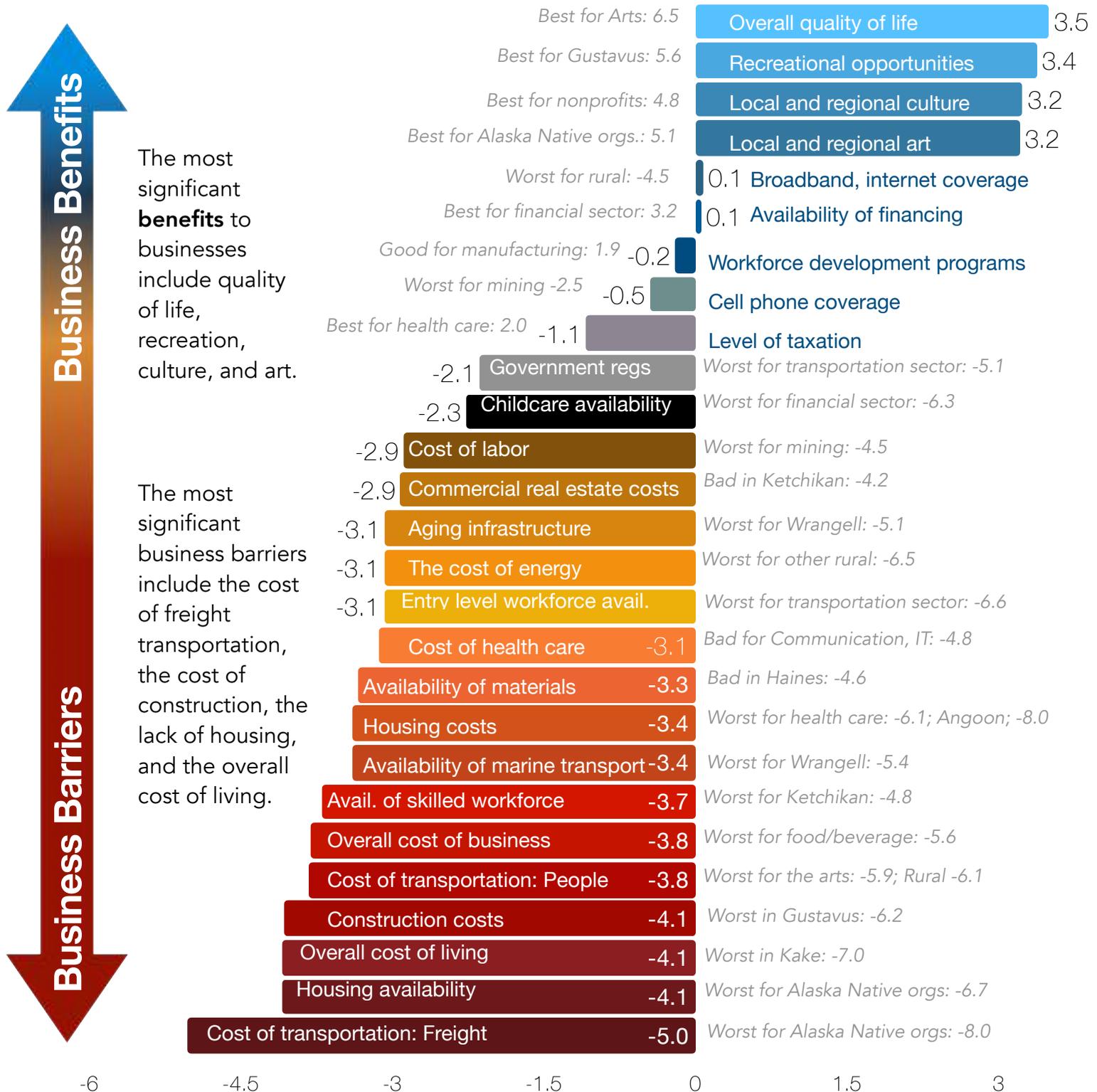
- **Not Affordable:** 69% of respondents say that home ownership prices are too high for their staff; and 63% say rental prices are too high.
- **Not Enough:** 67% of business leaders say there are not enough homes on the market to attract and retain workers; and 60% say there are not enough rentals to meet the housing needs of their workforce.

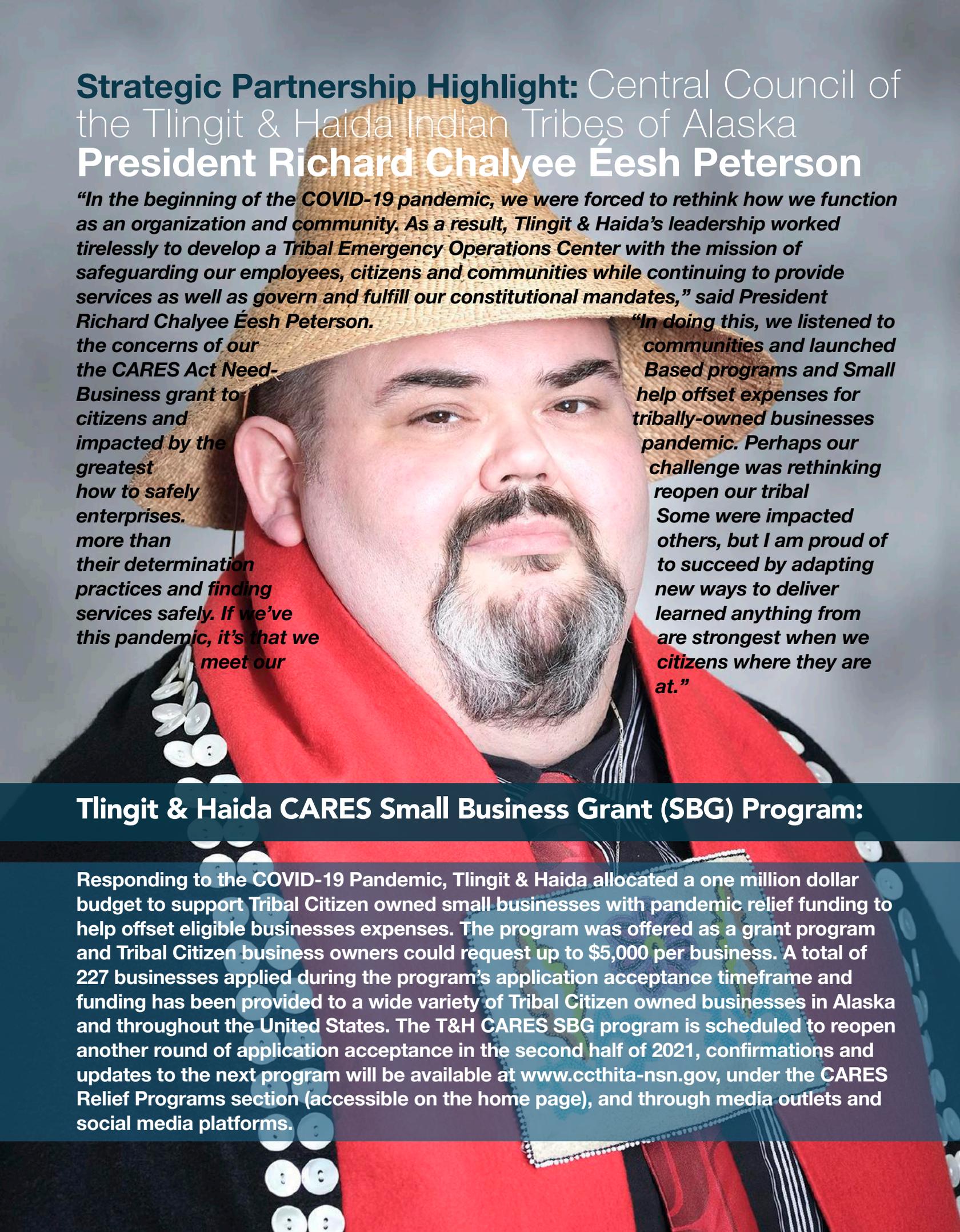
Half of business leaders say that the lack of housing is a *significant barrier* to their business. Hoonah and Sitka businesses report the most acute housing shortages, followed by Ketchikan and Skagway.



Barriers and Benefits: How do these elements impact your Southeast Alaska business?

Southeast business leaders were asked to rank the impact of 27 elements on their businesses. The region's **quality of life, recreation, culture, and arts** are the top business benefits to the region; while high **freight costs, lack of housing, and overall high cost of living** remain the region's top business barriers. Surveys from 2010 and 2015 show nearly identical top barriers and benefits.



A portrait of Richard Chalyee Éesh Peterson, President of the Central Council of the Tlingit & Haida Indian Tribes of Alaska. He is wearing a traditional woven hat and a red shawl over a dark jacket with white buttons. The background is a plain, light color.

Strategic Partnership Highlight: Central Council of the Tlingit & Haida Indian Tribes of Alaska **President Richard Chalyee Éesh Peterson**

“In the beginning of the COVID-19 pandemic, we were forced to rethink how we function as an organization and community. As a result, Tlingit & Haida’s leadership worked tirelessly to develop a Tribal Emergency Operations Center with the mission of safeguarding our employees, citizens and communities while continuing to provide services as well as govern and fulfill our constitutional mandates,” said President Richard Chalyee Éesh Peterson.

the concerns of our the CARES Act Need-Business grant to citizens and impacted by the greatest how to safely enterprises. more than their determination practices and finding services safely. If we’ve this pandemic, it’s that we meet our

“In doing this, we listened to communities and launched Based programs and Small help offset expenses for tribally-owned businesses pandemic. Perhaps our challenge was rethinking reopen our tribal Some were impacted others, but I am proud of to succeed by adapting new ways to deliver learned anything from are strongest when we citizens where they are at.”

Tlingit & Haida CARES Small Business Grant (SBG) Program:

Responding to the COVID-19 Pandemic, Tlingit & Haida allocated a one million dollar budget to support Tribal Citizen owned small businesses with pandemic relief funding to help offset eligible businesses expenses. The program was offered as a grant program and Tribal Citizen business owners could request up to \$5,000 per business. A total of 227 businesses applied during the program’s application acceptance timeframe and funding has been provided to a wide variety of Tribal Citizen owned businesses in Alaska and throughout the United States. The T&H CARES SBG program is scheduled to reopen another round of application acceptance in the second half of 2021, confirmations and updates to the next program will be available at www.ccthita-nsn.gov, under the CARES Relief Programs section (accessible on the home page), and through media outlets and social media platforms.

Southeast Alaska Resiliency Mapping

Surviving the pandemic economy

In order to understand how our community and business leaders plan to ensure the economic resilience of their businesses, industries, and communities, Southeast Conference asked the membership to define a collective vision for resilience. **Economic resilience is the ability to withstand and recover quickly from a disruption to the economic base.** Nearly 150 Southeast Conference members from 16 communities and 18 sectors across the region participated, explaining what they **plan to do or need in order to keep their businesses and communities economically stable.**

The results were definitive and clear. Business leaders will pursue revenue diversification and vaccine distribution, while they reduce spending and staffing. Other community leaders will support the continuation of COVID-19 mitigation measure, engage in economic planning efforts, and support infrastructure investments.

All respondents were concerned about how the pandemic will continue to impact the regional economy. Most concerned were the self-employed, 67% of whom say they have “maximum concern” regarding the overall impacts facing the region. Those involved in tourism registered the highest degree of concern regarding the impact COVID-19 has had on their industry (100% have maximum concern).

What Business Leaders Are Doing

1. **Revenue diversification.** The number one resilience response of Southeast Alaska’s business leaders is diversifying their revenue stream. Businesses are looking to find new clients, develop new products, including online sales and services, and expand markets into new areas.
2. **Vaccination advocacy.** Business leaders understand that the key to reopening the economy is a high vaccination rate, and they are working to promote and explain the importance of vaccines.

3. **Spending, staff & service reductions.** Business leaders are reducing their expenses in order to remain viable through the pandemic downturn. Businesses are cutting costs, reducing staffing levels, delaying investments, reassessing operations and refocusing resources on core business functions.
4. **Maximizing federal benefits.** Regional leaders are taking advantage of federal relief funding to cover fixed costs and keep their businesses operating.
5. **Encouraging local spending and hiring.**
6. **Engaging in long-term economic planning.**
7. **Applying for grants, loans, debt relief, and debt deferment.**
8. **Moving business and staff online.**
9. **Employing measures to maintain staffing levels.**
10. **Moving into survival mode until 2022.**

What Other Community Leaders Are Doing

1. **Continued COVID-19 mitigation.**
2. **Community & economic planning efforts.**
3. **Support infrastructure investment.**
4. **Plan for return of cruise ships.**

Getting to 2022: Short-Term Southeast Alaska Resilience Plan

Southeast Conference worked through its membership and committees to develop a short-term resilience plan to immediately shore up the regional economy, protect it from additional decline, and provide a caretaking role for our institutions to ensure the fundamentals of our economy will be in place by 2022, once the COVID-19 healthcare crisis has subsided.

1 Support Expedited Vaccine Distribution

Support a coordinated strategy to communicate the importance of vaccinations and create a higher level of understanding regarding the relationship between vaccine distribution and regrowth of the regional economy.

2 Revitalization of Air, Ferry, Cruise, and Freight Transportation Services

Support transportation providers as they work towards re-building service and routes. Set strategic direction across transportation providers to operate safely and within shared mitigation measures. Restore regional transportation services to pre-pandemic levels.

3 Regrow the Visitor Industry

Communicate the importance of the tourism industry, and the role of cruising in the industry's success to lawmakers and communities; advocate for the swift return of business to the region in order to maximize potential economic impact for 2021. Work to attract independent tourists. Support and collaborate with communities and entities to offer new programs and products catering to independent travelers.

4 Economic Disaster Declaration Request

In response to severe economic conditions caused by the pandemic and fisheries collapse, the Governor should declare an economic disaster area for Southeast Alaska as a whole.

5 Plan for a post COVID-19 Southeast Alaska Health Care System

There are vulnerabilities within the health care system that have been exacerbated during the COVID-19 crisis, including Medicaid cuts and reduced access to health care insurance. Advocate for the development of a state fiscal plan so that there is a

plan to fund needed state services. Ensure that the regional populace has access to health care, health care insurance, and has the community support they need to make healthy choices.

6 Ensure the Short-term Viability of the Seafood Sector

Southeast Alaska experienced one of the worst salmon seasons in our history. Work to revive the market in order to rebuild regional economic seafood systems. Work to ensure short-term viability of the seafood sector in order to develop long-term sustainability.

7 Keep Southeast Alaskans in their Homes

Support emergency rental assistance in Southeast Alaska and the organizations that are distributing funding. Explore creative options to reduce mortgage payments for those unable to make payments during this pandemic emergency, while also supporting landlords. Support housing disaster assistance.

8 Advocate for Childcare Prioritization in an Effort to Restart the Economy

A fully functional childcare system is needed to get the region fully back to work. Work to maintain childcare infrastructure.

9 Support Expedited Resolution to Solid Waste Shipping

Support the work of communities and shipping companies to create a safer system as communities move to new systems that include baling and compacting.

10 Request Tariff Relief

Work with the Alaska congressional delegation to support new trade negotiations with China that reduce or eliminate onerous tariffs on Southeast Alaska commodities.

Southeast Alaska Strategic Direction Action Plan

Southeast Conference Vision Statement: *Promote strong economies, healthy communities, and a quality environment in Southeast Alaska.*

Transportation

Transportation Goal Statement:

Support a consistent, reliable regional transportation system that enables predictable, financially sustainable, efficient transportation for a prosperous regional economy and access to medical care and cultural events.

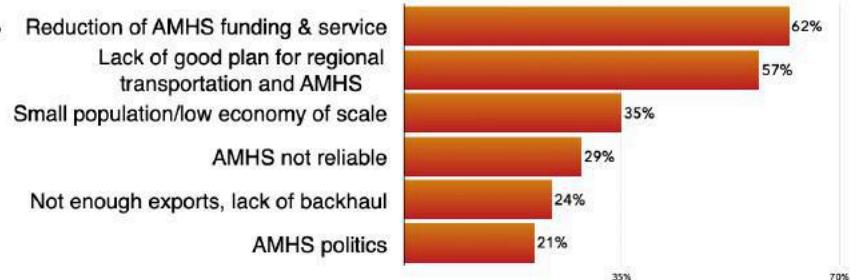
The Southeast Alaska Transportation SWOT and economic initiatives were developed and prioritized by the 46 members of the Southeast Conference Transportation Industry Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

Transportation Strengths



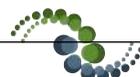
Transportation Weaknesses



Transportation Opportunities



Transportation Threats



Transportation Priority Objective

★ Priority Objective #1: Sustain and Support the Alaska Marine Highway System

The Alaska Marine Highway System (AMHS) has been pummeled by cuts related to the State fiscal crisis since 2013, and the global pandemic travel disruptions of 2020. In a coordinated effort to restore and strengthen connectivity in the region, the AMHS must provide reliable, basic service to coastal Alaska communities, create an economy of scale, and provide cost effective transportation services. This can be accomplished through

1) Changing the governance model for AMHS – an empowered management structure is needed to help the support the Alaska Marine Highway’s mission; and
2) Implementing the AMHS Reshaping

Recommendations – supporting the State of Alaska as it implements the recommendations from the 2020 Alaska Marine Highway Reshaping Work Group and SEC AMHS Reform Initiative.

Other Transportation Objectives:

Objective #2: Develop a long-term, strategic, multi-modal, regional transportation plan

Southeast Alaska has been without a current regional transportation plan for the region’s ferries, roads, airports, ports and harbors since the 2004 Southeast Alaska Transportation Plan (SATP) was published. Work with the State of Alaska to develop a comprehensive approach to transportation planning through the regional Southeast Alaska Transportation Plan (SATP) process. Develop an action plan that will ensure the region’s multi-modal transportation systems meet the needs of the region’s people and economy.

Objective #3: Ensure the stability of regional passenger transportation services

The passenger transportation networks in Southeast Alaska comprise a critical economic engine for the region, generating jobs, commerce, and tourism - while also increasing community wellbeing. Support consistently providing federal funding for continued maintenance and operations in order to create more

long-term certainty and predictable levels of service. Facilitate discussions for solutions to transportation gaps of service.

Objective #4: Move freight to and from markets more efficiently

Southeast residents depend on the movement of goods, and barge operators carry the bulk of freight. Find ways to stabilize the cost of transporting goods into, out of, and within the region. Work with the transportation industry to find ways to reduce the costs for the transportation of goods. Explore freight forwarding at the international border. Design system around large fisheries summer markets and lower ferry capacity in the winter. Determine the best ways to move perishables to and from markets in Southeast. Ensure that the infrastructure improvements needed to support barge operations move forward. Support more frequent barge services for communities with limited freight services, especially in the winter.

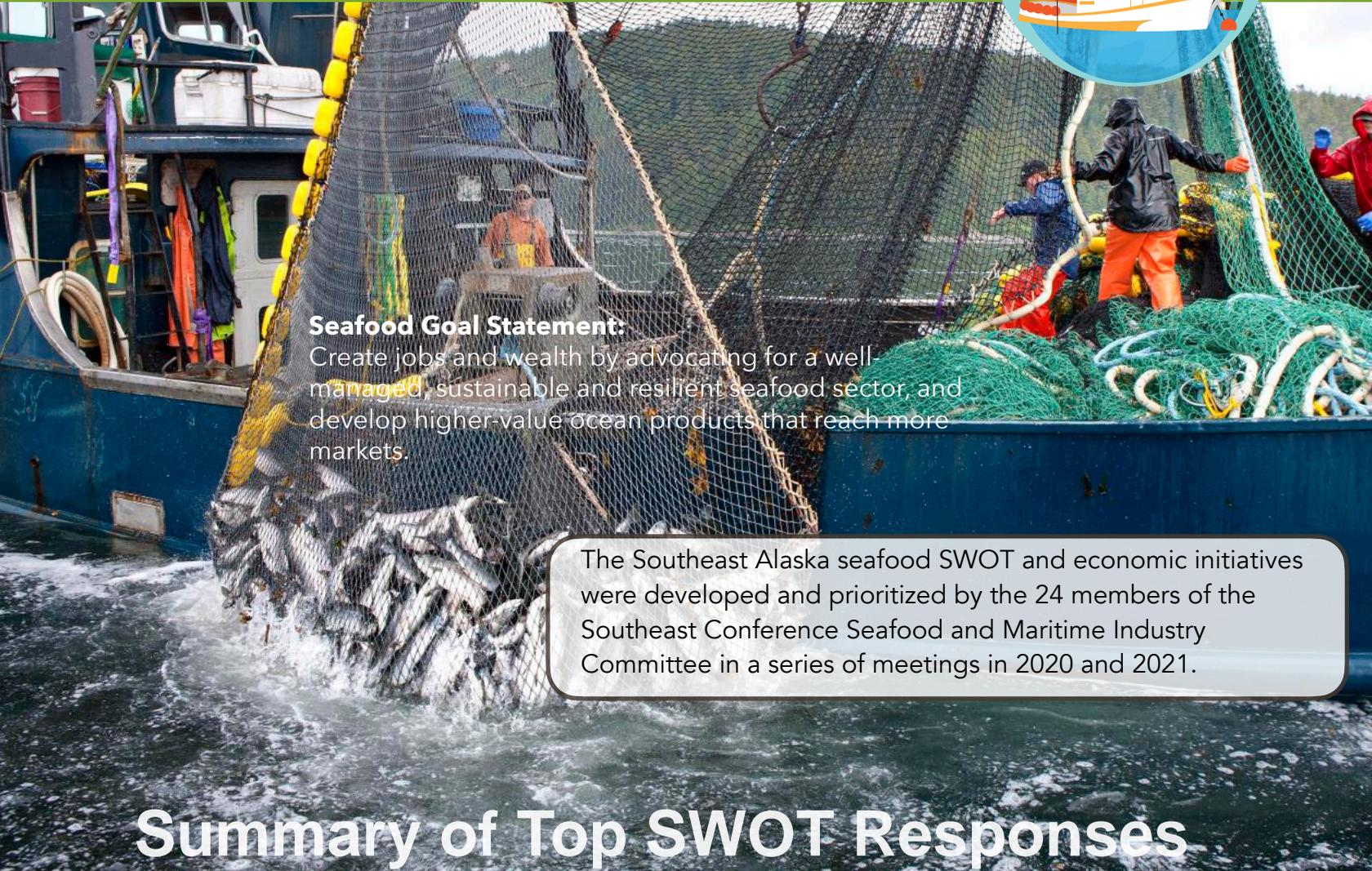
Objective #5: Ports and harbors infrastructure improvements

Advocate for port and harbor infrastructure improvements. Address current user needs while exploring opportunities to develop these facilities beyond traditional uses and local networks, including private sector investment opportunities with the objective of improving the reliability and effectiveness of serving the entire port and harbor network. Include infrastructure for float planes, including floats and fueling stations.

Objective #6: Road Development

While only three communities (Haines, Skagway and Hyder) are directly connected to highways outside of the region, roads are the primary way to get around within communities. Expand use of the existing road network. Reconfigure and extend roads to address high traffic volume corridors that can be most economically served by road improvements. Improve utilization of existing road systems while maximizing use of ferries. Several roads in the region are not being used in an intermodal fashion, and other roads are underutilized. Develop new roads and expanded road access. This includes “roads to resources” that will provide access to resources that are important for economic development. Continue and complete design of access corridors — transportation corridors between communities and to resources.

Seafood and Maritime



Seafood Goal Statement:

Create jobs and wealth by advocating for a well-managed, sustainable and resilient seafood sector, and develop higher-value ocean products that reach more markets.

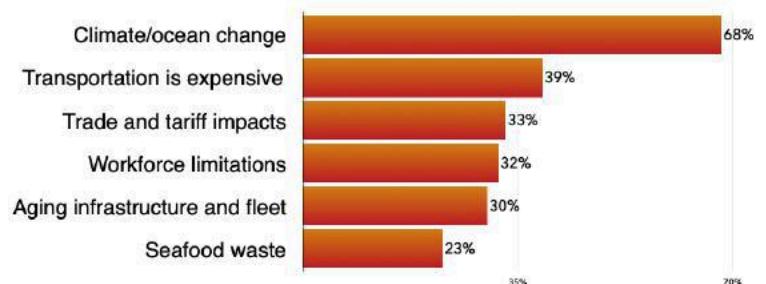
The Southeast Alaska seafood SWOT and economic initiatives were developed and prioritized by the 24 members of the Southeast Conference Seafood and Maritime Industry Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

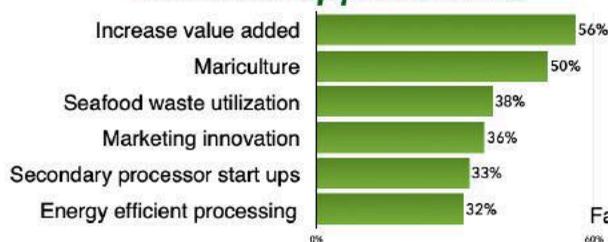
Seafood Strengths



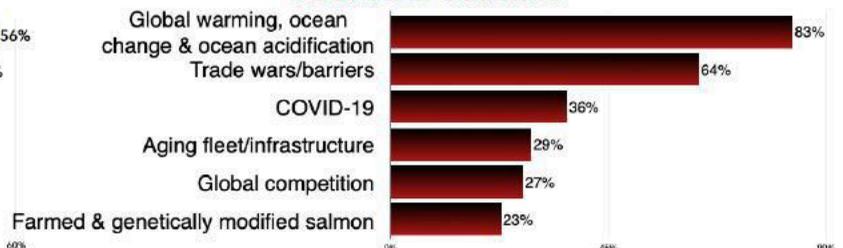
Seafood Weaknesses



Seafood Opportunities



Seafood Threats



Seafood

Seafood Priority Objective

★ Priority Objective: Mariculture Development

Support development of the mariculture industry, including enhancement, restoration and aquatic farming of shellfish and seaweeds. Work with the Governor's Office to promote mariculture objectives. Support implementation of the Alaska Mariculture Development Plan, the Alaska Mariculture Task Force's Five-Year Action Plan, and the Alaska Mariculture Alliance. Increase the number of mariculture operations, providing financial and technical support for interested mariculture entrepreneurs. Support the marketing of mariculture products. Support increased hatchery capacity and seed production, including stability for operations, technical transfer, and workforce development. Leverage existing seafood processing capital, including bringing additional seaweed and oyster processing capacity to the region. Work with mariculture farmers to develop a frozen oyster products and markets. Support development of multi-use facilities for processing, storing, aggregation and shipment. Support research, community engagement, and education for mariculture in the region.



Other Seafood Objectives:

Objective #2: Work to Further Promote a Year-round Seafood Economy in the Region

Find ways to expand existing economic activity before and after the summer salmon season to better insulate local economies by developing a longer, expanded seafood season. Promote incentives to seafood processors to develop value-added seafood products produced outside the traditional salmon harvest and processing season. Develop and process products throughout the year to help establish a more

year-round processing workforce and create more economic activity in-between fishing seasons

Objective #3: Further Develop Seafood Markets

Support ASMI's work to expand existing and develop new domestic and international markets for Alaska seafood, along with the industry's efforts to develop new products. Support ASMI and the Alaska seafood supply chain in restoring markets impacted by COVID by taking advantage of funding, new opportunities, and efficiencies. Partner with ASMI and other resources to provide more opportunities to source local seafood for Alaska businesses to build markets locally. Work across the region to create more direct marketing opportunities.

Objective #4: Maintain a Stable Regulatory Regime to Support the Seafood Sector

Protect commercial fisheries by advocating for stable regulatory and management regimes. Use the best science available at state and federal levels. Educate policy makers to employ responsible and sustainable harvest decisions for Alaska seafood while promoting access to the resources. Advocate that state Fish & Game management ensures data is available to manage fisheries to the maximum extent possible.

Objective #5: Research the effects of changing ocean conditions on the marine environment

Research ocean acidification and ocean warming in Alaska and look to reduce impacts on the fisheries. Educate and advocate regarding mitigation pathways. Support the research of the University of Alaska of temperature impacts on marine ecosystems, range shifts, and recruitment failure. Support researchers in developing advice to management agencies regarding sustainable management of fisheries in face of climate driven changes.

Objective #6: Support Regional Processors Becoming Economically Competitive

Advocate for continued and increased seafood processing and manufacturing within the region. Support processors in increasing overall capacity



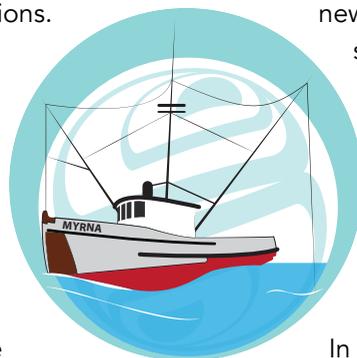
levels, as well as expanding the variety and availability of seafood products. Encourage the broadening of marketing efforts. Increase the number of firms producing high-value products. Support development of necessary infrastructure for seafood processing activities. Modernize processing plants and update/improve transportation routes to get products to market. Work to assist processors getting seafood to market cheaper, faster, and fresher.

Objective #7: Communicate the Importance of Salmon Hatcheries

Create an information campaign describing Southeast Alaska's salmon hatchery program as an example of sustainable economic development that directly benefits subsistence fishermen, personal use fishermen, sport fishermen, charter fishermen, commercial fishermen, seafood processors, as well as state and local governments. Communicate that hatcheries are operated by non-profit associations who rely on the best scientific methodology, precautionary principles and sustainable fisheries policies to protect wild salmon populations.

Objective #8: Seafood Sector Workforce Development

Work with the seafood industry and state to promote increased seasonal workforce attraction and development. Engage in workforce development efforts to attract young Southeast Alaskans to participate in the



seafood economy. The absence of young fishermen is compounded by the rise in nonresident permit ownership in local fisheries. Work with UAS to build a program that parallels seafood/mariculture programming. Secure funding for a workforce apprenticeship program for young Alaskans for mariculture. Work with processors to support workforce development and advancements.

Objective #9: Full Resource Utilization & Ocean Product Development

Increase total revenue from existing commercial fisheries in the region by developing new, higher value products and markets from parts of the fish that are currently either thrown away or that go to lower relative value markets. Work with seafood processors to develop new products and identify businesses or entrepreneurs not currently in the seafood industry who can contribute to this effort. Collaborate with private, state, federal, and university researchers needs to encourage, identify, and accelerate opportunities for commercialization of improved or new products. Support development of new specialty products that utilize 100% of harvested seafood resources in order to create value-added products with the same resource and provide additional economic benefits to local economies.

Objective #10: Increased Sea Otter Utilization

In the late 1960s, sea otters were re-introduced



to Southeast Alaska and now represent one-fifth of the global sea otter population. Support the development of management plans to target and protect important shellfish areas. Support sea otter management and utilization. Expand allowable use of sea otters taken for subsistence purposes. Support development of new products and markets for otter products. Support development of sea otter sewing businesses and strategies for increasing value of these products.

businesses and municipal maritime enterprises. Identify subject matter experts to support Marine Industrial Support career opportunities. Identify public education programs, apprenticeships, private training entities, and Marine business supporting internships.

Objective #2: Increase Energy Efficiency and Reduce Energy Costs



Support programs that aim to increase energy efficiency of vessels and processing plants. Reduce reliance on diesel for both boats and processing plants. Move the commercial fishing fleet away from diesel dependency using concepts such as diesel-electric hybrid vessels, hydrogen, or other energy alternatives.

Find alternatives to reduce use of diesel for processing plants and cold storage facilities that could include increased energy efficiency or hydropower.

Objective #3: Expand Regional Marine Industrial Support Capacity

The Marine Industrial Support (MIS) Sector includes marine vessel repair and construction, marine civil construction, and ports and harbors development. Create a digital MIS catalogue of SE Alaska public and private marine industrial businesses and facilities providing information on capabilities and capacities. Inform marine vessel owners and operators of regional MIS capabilities and capacities.

Maritime Industrial Support Sector

Maritime Goal Statement: *Create a comprehensive, robust maritime support services sector that will meet current and growing demands of the businesses within the Alaska maritime economy.*

Objective #1: Increase employment and training opportunities for Southeast Alaska residents in the Marine Industrial Support Sector

Support development of school and University programs and curricula focused on industrial knowledge, skills and experience transferable to Marine Industrial Support employment opportunities, i.e. UAS Ketchikan Maritime and Multi-Skilled Worker Program. Create a model for youth and adult internships in regional Marine Industrial Support

Visitor Industry



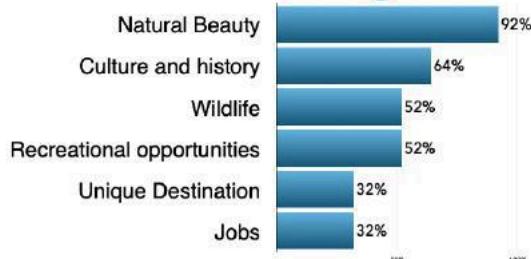
Tourism Goal Statement:

Increase visitor-related opportunities; enhance Southeast Alaska as a destination for visitors; and capitalize on the attributes of the region.

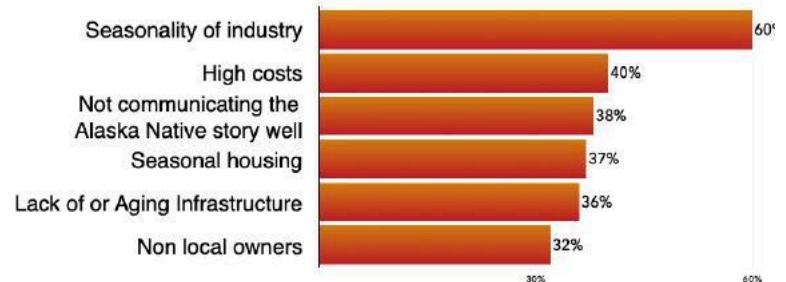
The Southeast Alaska tourism SWOT and economic initiatives were developed and prioritized by the 45 members of the Southeast Conference tourism Industry Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

Tourism Strengths



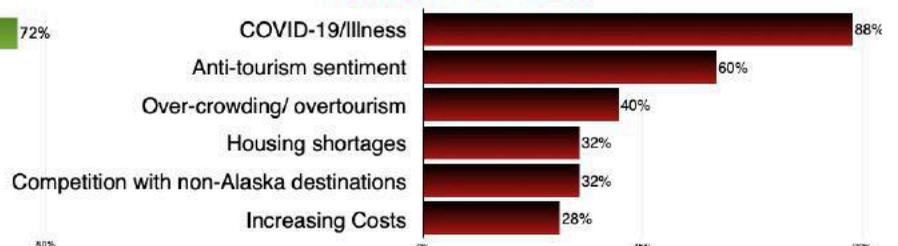
Tourism Weaknesses



Tourism Opportunities



Tourism Threats



Visitor Industry Priority Objective

★ Priority Objective #1: Market Southeast Alaska to Attract More Visitor Spending and Visitor Opportunities

Create regional collaborative partnerships to market Southeast Alaska as a tourism destination. Enhance the reach and effectiveness of existing marketing activities conducted throughout the region and support organizations across the region as they work to develop new marketing strategies and campaigns post COVID. Focus on marketing to draw a diverse array of tourists to the region. Support communities and small businesses in the development of new and expanded products, tours and shoreside excursions. Harness the beauty of Southeast Alaska to create visuals for marketing.



Other Tourism Objectives:

Objective #2: Grow Cultural and Arts Tourism Opportunities

Support efforts to grow Indigenous and Cultural Heritage Tourism. Southeast Alaska has a rich and vibrant Alaska Native culture that traces back 10,000 years with art forms that evolved with each region developing distinct features. Incorporate Alaska Native culture, indigenous art, and history into tourism products. Continue to leverage cultural tourism as a strength. Support the efforts of communities, tribes, and Alaska Native organizations to create new cultural tourism products. Connect the entities working in this area. Innovate and create world class cultural tourism models. Continue to integrate Alaska Native signage, language, arts, history, and name places into communities. Support integration of Alaska Native guides into tourism experience. Consult with Tribes and Indigenous and Cultural Heritage Tourism leadership on appropriate cultural and cross-cultural messaging.

Objective #3: Increase Access to Public Lands and Expand Southeast Alaska Trail Network

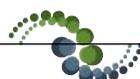
Work to change how federal land access and permitting works in Southeast Alaska. Provide more access to recreational opportunities and expand access to recreation by supporting and growing the region's non-motorized trail systems. Increase guided access to public lands by increasing the number of permits available, providing more outfitter guide days, and developing new wildlife viewing options on federal lands. Increase flexibility of permits (permits can be hard to obtain and are non-transferrable, making it difficult to provide the certainty needed to develop business plans). Encourage private/ public partnership to help construct and maintain trails, seawalks, cabins, and other recreation opportunities. Develop or improve infrastructure to support multi-day outings for individual travelers by supporting cabins or campsites in conjunction with trails, canoe, and kayak routes.

Objective #4: Increase Yacht and Small Cruise Ship Visitation

Support increased growth small cruise ship and yacht visitation in the region. Develop long-term infrastructure plans to grow and support small vessel tourism sector. Advocate for funding for visitor and transportation related infrastructure development to accommodate additional vessels and vessel related services.

Objective #5: Educate Public on the Economic Value of Tourism in SE Alaska

The visitor industry was the top provider of jobs in SE Alaska pre-pandemic times and was on track to be the top provider of wages in the region. Support an outreach program to clearly communicate the value of the visitor industry to Southeast Alaska. Promote the importance and effectiveness of Juneau's Tourism Best Management Practices (TBMP) program which other destinations and tourism providers across the region have begun adopting in order to ensure our communities are great places to live and to visit. Share the Southeast Alaska visitor industry success story and work to address misinformation regarding the impacts of tourism. Develop a focused public relations effort led by visitor industry businesses.



Energy



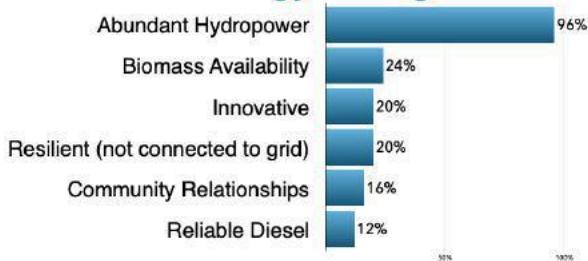
Energy Goal Statement:

To create long term energy security, support energy infrastructure development, and promote efficient use of existing energy-related resources within Southeast Alaska.

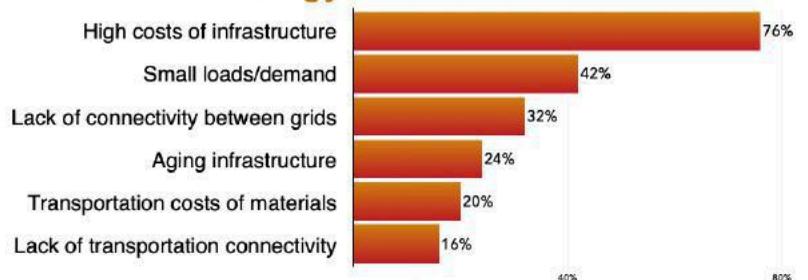
The Southeast Alaska energy SWOT and economic initiatives were developed and prioritized by the 33 members of the Southeast Conference Energy Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

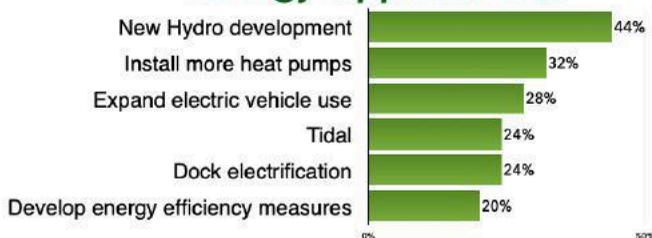
Energy Strengths



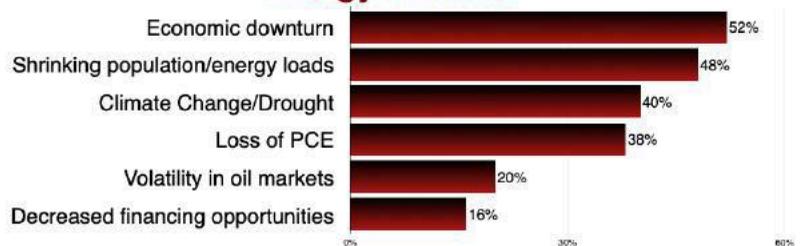
Energy Weaknesses



Energy Opportunities



Energy Threats



Energy Priority Objective

★ Priority Objective #1: Promote beneficial electrification

Work with utilities to support utilizing a wider range of renewable resources in the region and to develop innovative rates and programs that encourage beneficial electrification by consumers. Work with communities to support consumer adoption of technologies that can be added to the electric system in a manner that increases the value of the grid. The primary opportunities for beneficial electrification in Southeast Alaska include: Heat pumps, electric vehicles (EVs), research emerging technologies, and dock electrification.

Other Energy Objectives:

Objective #2: Continue to support rural Southeast communities with high-cost electric rates without access to lower cost hydroelectricity

Southeast Alaska's rural remote communities often do not have access to lower cost hydroelectricity. Work to secure continued access to renewable energy funding for rural communities, while recognizing the risk that costs could be increased by implementation of high-cost energy projects. Work to preserve the Power Cost Equalization (PCE) Endowment and maintain the PCE program. Support a block rate structure to leverage the PCE program in accordance with the model completed by the Alaska Center for Energy and Power. The PCE is a critical lifeline that provides access to affordable electric power for rural Alaskans and allows rural communities to have affordable electricity for streetlights, water and sewer facilities, and other essential public infrastructure.

Objective #3: Work with communities to create energy systems that provide sustainable, affordable, renewable thermal energy

Space heating costs represent a major portion of energy expenditures in Southeast Alaska. Developing and integrating renewable sources of electricity is difficult in the region, often requiring investment in considerable infrastructure by utilities, individual

residences, and businesses. Pursue opportunities to provide thermal energy to individual buildings, or groups of buildings in the case of district heating systems, with small-scale and affordable systems powered by renewable fuels, including biomass, solar, geothermal, wind, tidal, hydropower, and potentially liquified natural gas.

Objective #4: Implement regional energy plan with a focus on "committed units" and deployment of renewables

Partner with state and federal agencies to advocate for renewable energy development and advance energy technologies in order to promote economic development and jobs to contribute to a resilient tax base. Update the Southeast Alaska Integrated Resource Plan (SEIRP) and list of "committed resources," to include generation projects and transmission hydroelectrical interties that have regional support. The adoption of the Roadless Rule in the Tongass National Forest may have a specific impact on the costs associated with transmission interties since the last update to the SEIRP. Continue to pursue opportunities for energy efficiency in generation, transmission and demand-side management. Facilitate technical expertise of deploying renewables and educate consumers regarding energy use. Educate and communicate the value and importance of regional energy projects, especially small, community-based projects. There are a number of projects that help meet renewable energy goals of the state and federal agencies.

Objective #5: Energy Workforce Development

The region has specific needs for training related to installation and maintenance of heat pumps, hydroelectricity, maintenance of electric vehicles, and operation and maintenance of building energy systems and controls. Provide training and technical assistance for the workforce involved in regional energy. The Southeast Alaska energy sector is a small community that is agile and multidisciplinary. This diversity of experience drives innovation that can be shared across the region. Encourage utilities to work together to prepare for, test, and invent emerging technologies that allow the sector to accomplish more with the abundant renewable resources.

Timber Industry



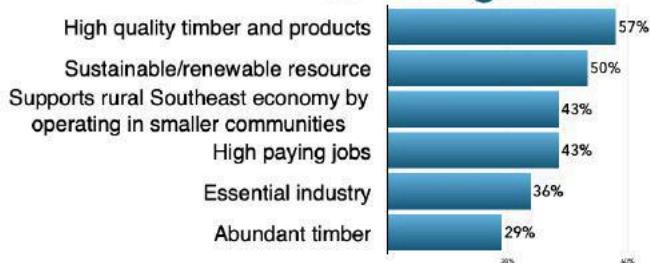
Timber Goal Statement:

Increase the timber industry workforce, increase economic timber supply levels and infrastructure.

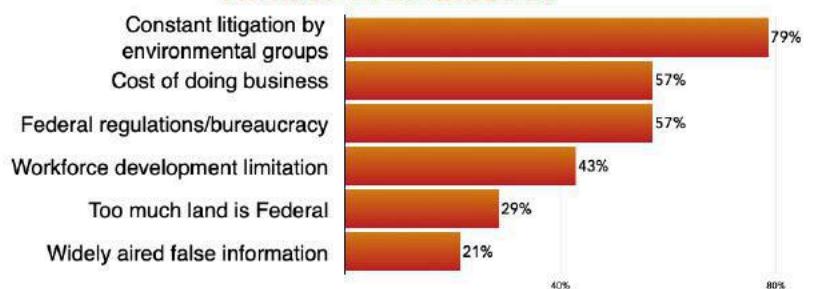
The Southeast Alaska timber SWOT and economic initiatives were developed and prioritized by the 15 members of the Southeast Conference Timber Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

Timber Strengths



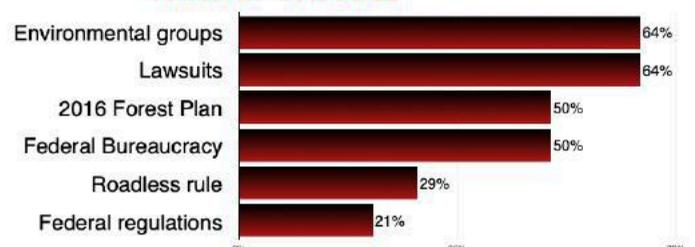
Timber Weaknesses



Timber Opportunities



Timber Threats



Timber Objectives

Objective #1: Provide an economically viable and dependable supply of timber from the Tongass National Forest to regional timber operators

Support management, research, and legal efforts to assure access to adequate, consistent, and economic timber supply on federal and state forest lands. To be economically successful, local mills must be provided an opportunity to accumulate a supply of purchased but unharvested economic timber (i.e. volume under contract) equal to approximately three years of timber consumption. This allows the industry time to plan orderly and systematic harvest schedules that meet timing restrictions and permit requirements; better manage its financial resources and to secure financing on the basis of longer-term timber supply; allow time for the infrastructure maintenance; and gives the industry more opportunity to sustain itself through erratic market cycles.

Objective #2: Revise the Tongass National Forest Land Management Plan

Support the development of an updated management plan for the Tongass which assists with developing a stable, economically viable timber sale program that produces sufficient, predictable timber volume to meet market demand three years in advance. Update standards and guides to reflect modern use of the forest. Revisit Land Use Designations, and updated fall down calculations. Develop a reasonable schedule to conduct young growth harvests that are economically viable. Address market development and market fluctuations, including identifying markets for young growth. Develop 10-year plans.

Objective #3: Support an integrated timber industry that includes harvest of young growth and old growth

Address the USFS transition plan that expects harvest to be predominantly young growth by 2040 to 2070. Work to integrate and diversify the timber industry rather than developing an industry extinguishment and replacement strategy. Develop new and boutique markets for AK forest products, including consideration of the demand for old growth products. Ensure timber sales are economically viable. Provide a

cushion of purchased but unharvested timber. Allow economic old growth timber to be harvested in a volume sufficient to meet market demand for an integrated timber industry.

Objective #4: Community-Based Timber Workforce Development

Work to attract and retain forest product professionals. Support local workforce development for timber focused occupations. Consider a multi-organization workforce development initiative with local, non-profit, state and landowner participation. Ensure there are sufficient contractors in the region to support the timber industry.

Objective #5: Work with USFS to direct federal contracts and timber sale opportunities toward eligible locally owned businesses

The Forest Service commits spending each year to contracts in support of construction, maintenance and land management. Help direct these contracts to local firms. Advocate for right-sizing larger projects into several smaller or linked phases. Revise federal financial bonding requirements on contracts. Provide a variety of large and small contract opportunities. Extend harvest schedules, allow harvest of dead/down trees on road corridors, and reduce bonding requirements.

Objective #6: Timber Communication and Advocacy

Factual errors and misguided information regarding both industry and the Tongass continue to be promulgated on the regional, state, and national levels. Change the perception of industry through a focused public relations effort led by industry and supported by regional partners. Tell the story of the Southeast Alaska timber industry as it exists today. Describe timber's associated secondary and tertiary industries that benefit directly from timber harvest and associated projects, contracts, and personnel.

Objective #7: Promote Free Trade

Resolve the trade war and continue to advocate for tariff exclusions and exemptions. Current tariffs on spruce logs has substantially increased costs and reduced harvest levels. Steep tariffs have halted much of the region's young growth harvests.

Mining and Exploration



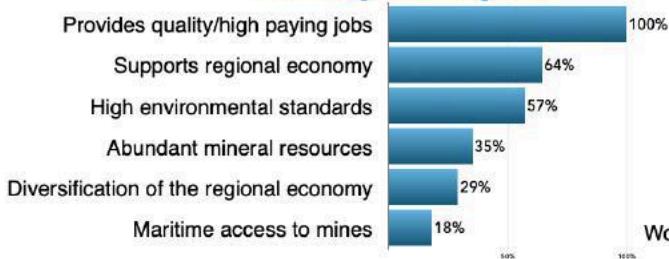
Mining Goal Statement:

Support responsible mineral development in Southeast Alaska.

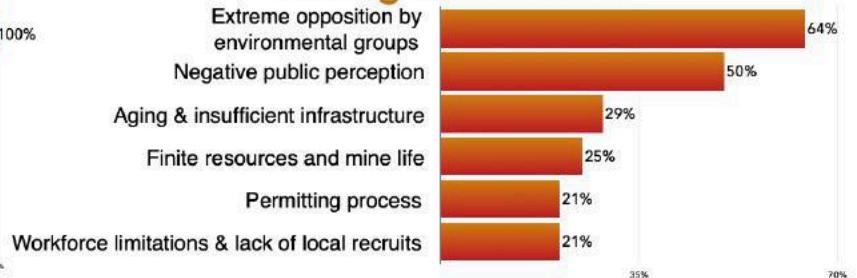
The Southeast Alaska mining SWOT and economic initiatives were developed and prioritized by the 20 members of the Southeast Conference Mining Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

Mining Strengths



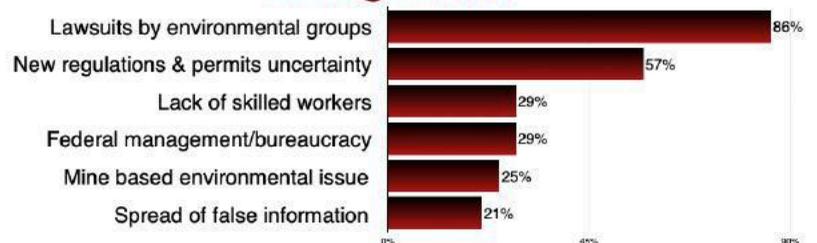
Mining Weaknesses



Mining Opportunities



Mining Threats



Mining and Exploration Objectives

Objective #1: Proactively support mining operations and mineral exploration projects

Support and promote responsible, economically and environmentally sustainable resource development and management. Increase awareness of the high environmental bar adhered to by regional mining operations. Promote a better understanding of environmental plans that are being followed - for both operating and future mines. Tell the story of the Southeast Alaska mining industry as it exists today. Combat misinformation promulgated on the regional, state, and national levels. Promote an understanding of the community benefits of mining in the region, the uses of regional minerals, and that the abundance of minerals is a natural asset providing economic advantages.

Objective #2: Support efforts to increase access to minerals and energy sources for mining on state and federal lands

Ensure that federal lands in Southeast Alaska are developable and accessible. Support access for the mining industry and hydroelectricity in the Tongass. Energy and access are two of the major obstacles to mining development. Increase access and infrastructure development. Mining companies often need road access to get heavy equipment from tidewater to a project site or for exploring and developing a mine or a hydro facility. Road access for mining exploration and development and for renewable energy projects has been particularly difficult to obtain in IRAs.

Objective #3: Mining and Exploration Workforce Development

Continue to work with the University of Alaska Southeast to provide high caliber training to help high school students and other workers explore the workforce diversity available and find employment in the mining industry. Mining provides diverse, high paying, year-round jobs at Southeast's three active underground mines, in the exploration industry, and in mining support services. Ongoing workforce development is needed to maintain and grow regional employment in these skilled and professional positions.

Objective #4: Preserve access to reliable, year-round transportation for miners living in rural Southeast Alaska

Support ferry service (AMHS and IFA) that provides transportation for mining workers to their jobs. Mines have recruited and employ a significant level of regional talent. However, miners living outside of key mining locations no longer have reliable transportation connectivity to travel to and from their home community between shifts.

Objective #5: Attract mining capital

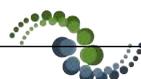
The Forest Service spends millions each year on contracts in support of construction, maintenance and land management. Help direct these contracts to local firms. Advocate for right-sizing larger projects into several smaller or linked phases. Revise federal financial bonding requirements on contracts. Provide a variety of large and small contract opportunities. Extend harvest schedules, allow harvest of dead/down trees on road corridors, and reduce bonding requirements.

Objective #6: Create a more stable regulatory environment

Support the permitting process that has been developed. Ensure there is understanding regarding how new regulatory proposals might impact current and future mining operations and educate decision-makers on the importance of regulatory stability for the economy, environment, and communities.

Objective #7: Support research of regional mineral deposits and understand land use planning

Develop a better understanding of Southeast Alaska's mineral deposits through research. Evaluate the status and potential need for change of existing land use plans. Advertise regional mineral endowments.



Health Care Sector



Health Care Goal Statement:

Collaborate to support the partnerships providing healthcare for Southeast Alaskans

The Southeast Alaska health care SWOT and economic initiatives were developed and prioritized by the 20 members of the Southeast Conference Health Care Industry Committee in a series of meetings in 2019 and 2020.

Summary of Top SWOT Responses

Health Care Strengths



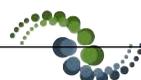
Health Care Weaknesses



Health Care Opportunities



Health Care Threats



Health Care Objectives

Objective #1: Plan for a post COVID-19 Southeast Alaska economy and health care system

Vulnerabilities within the health care system are likely to be exacerbated following the COVID-19 crisis, including Medicaid cuts, reduced access to health care insurance. Advocate for the development of a state fiscal plan that incorporates a plan to sustainably fund state services, so that the region can continue to provide robust health care operations moving forward. Ensure the regional populace has access to health care and health care insurance, and has the community support needed to make informed, healthy choices.

Objective #2: Retain Alaska Trained Health Care Students

Work to retain students in health care related programs and support them through graduation. Coordinate early with potential employers. Give providers an opportunity to help students stay in the region by offering perks to university or students. Once students are trained they will likely to settle in the community that provides their first job. Work to remove the barriers to having those first jobs be in rural communities. Build on the health care provider recruitment concept of the Rural Immersion Pilot Program, which successfully focused on six communities in Southeast Alaska.



Objective #3: Meet the health care needs of an aging population

Ensure there are sufficient resources for those who wish to “age in place” in Southeast Alaska. Since 2010, the 60-plus population grew by 45%, and a quarter of people in the region are now age 60 or older. Ensure the region has sufficient home health care aides and assisted living facilities.

Objective #4: Increase health care training within the region and state

Build University of Alaska programming to be responsive to the critical health care workforce needs identified by the Southeast Alaska Health Care Workforce Analysis. As health care needs in the region

grow, so does the need for a larger highly capable, trained workforce. Analysis shows that being “from Alaska” is one of the most critical factors determining whether or not an employee will stay in the job over the long-term. Expand programming available within the university to build a locally grown workforce.

Objective #5: Reduce barriers to hiring outside workers

Work with State of Alaska to reduce the time it takes for physicians and nurses moving to the region from out of state to get Alaska licenses. A long process results in the loss of high-quality professionals to other states.

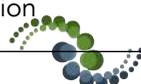
Objective #6: Improve Recruitment Strategies

Look for creative solutions in finding different ways to recruit new talent. Rather than going through a recruitment agency, develop local employment pools for the recruitment resources for the region. Create a catalogue of jobs regional providers are recruiting for, and share. Continue recruitment partnerships with the University system, Job center network, Alaska Department of Labor, and Alaska Workforce Investment Board. Work to eliminate barriers to recruitment and retention presented in the Health Care Workforce Analysis. Market the region to out of state recruits. Expand local university programs to meet region needs. Increase reimbursement rates and reduce unfunded mandates. Develop a better variety of rental units and homes to buy. Assist in brainstorming ideas to increase reliable childcare.

Objective #7: Regional health care enhanced partnerships

As resources become scarcer, it is more important than ever to collaborate across the region within the health care industry and coordinate more effectively.

Continue advisory group to promote regional health care solutions. Collaborate on Grants/Funding. Eliminate Duplication in Regional Efforts. Share technology and procurement best practices. Coordinate training of existing staff.





In addition to the economic initiatives that sit within the key economic sectors, there are critical additional initiatives that sit outside these focus areas. The Southeast Alaska Economic Development initiatives were developed by 30 members of the Southeast Conference Economic Development Committee in a series of meetings in 2021. They have been prioritized in the order presented below:

Other Objectives

#1: Child Care Objective: Increase Child Care Capacity in Southeast Alaska

Work across the region to expand childcare capacity. Studies show that high quality early childhood education provides a significant return on investment for communities. In Southeast Alaska there is an inadequate supply of affordable, high quality preschool and childcare. Policies to solve the dual problem of low childcare worker pay and issues of access and affordability to high-quality care, should be considered at all levels of government, including the following: Long-term dedicated funding for childcare worker wage subsidies and job-based benefits should be included in future budgets. Childcare workers are paid 40% less in median income than other workers. Paying living wages and providing necessary benefits is essential to attract and retain the best workers. Possible solutions include strategies such as income-based subsidies so parents pay no more than 10% of income on childcare



costs; or the public provision of high-quality childcare for children ages birth-5 years.

#2: Housing Objective: Support the sustainable development of housing

Increase access to housing, including to low- and moderate-income housing, to create more livable, economically competitive, resilient communities. Lack of housing and high housing costs is a deterrent to economic growth, making it difficult to attract or retain employees in the region. Throughout Southeast Alaska there is a lack of affordability and choice in housing. Develop new housing stock, targeted housing for an aging population, and increase the diversity of housing choices in the region. Include fair market housing options for homeownership and private market rentals; along with subsidized rentals through rental assistance or vouchers, public housing, and housing for seniors, veterans, the homeless, and other special needs populations. Work across the region to find ways to reduce the costs associated with land development and new housing construction. Work to improve housing conditions in homes are aging and have mold and rot issues.



#3: Communications Objective: Improve communications access in Southeast Alaska

Support expansion of high-speed internet and cellular network coverage to make the region more competitive and provide more access to education. Broadband access fosters business development and expansion, telecommuting and micro-businesses, and increased education opportunities across Southeast Alaska. Remote work accessibility has become increasingly utilized in the growing world economy. Prioritize development of fiber, satellite, and other technologies that provide remote internet access in the region. Communications and reliable multi-point-of-failure pathways are attractive to investors, businesses, and families looking to stay connected. Equitable access to educational opportunities offers local improved education outcomes and workforce development.

#4: Education Objective: Partner with University of Alaska Southeast and K-12 school districts to build career pathways and meet employer needs for a skilled workforce

Quality education and workforce training is critical to the development of a strong economy. Southeast Alaska has an insufficient pool of skilled employees with professional and technical degrees to support the business sector. Workforce development and support of career and technical education are included throughout this plan in the maritime, health care, mining, seafood, and timber sections. In addition to these efforts, support continued development of K-12 and post-secondary education opportunities and pathways in the region. Retain students in state after graduation. Develop short courses to update skills in partnership with UAS. Increase arts, cultural studies, and local language courses. Ensure UAS has certifications to meet local workforce needs. Create mentorships. Develop and retain top talent. Support scholarships and grants from municipalities for UAS.



#5: Natural Disaster Planning Objective: Support Disaster Preparation and Relief Efforts

After the devastating landslides in recent years, disaster preparation efforts should be a cornerstone of planning procedures going forward. Develop appropriate planning procedures to mitigate natural disasters in the region. Advocate for disaster relief resources and funding for areas affected by natural disasters. Support the development of a disaster relief task force in the wake of events. Protect the economic vitality of areas affected by natural disasters. Ensure the safety of the residents in Southeast communities through robust disaster alert systems.

#6: Solid Waste Objective: Support Regional Solid Waste Management Solutions

Develop best practices solutions handling MSW including baling and compacting solid waste for shipping waste. Increase utilization of regional recycling and composting programs and increase use of commercial burn units. Communicate the importance of waste sorting to citizens in communities who ship their waste. Procure equipment to manage increasing amounts of tires. Create partnerships to share equipment, such as balers and shredders, across communities in the region.

Objective #7: Food Security Objective: Increase supply, demand and equitable access and distribution of local foods and regional food system opportunities

Recognize the critical role local food harvesting practices have in household food security for indigenous and non-indigenous peoples of Southeast Alaska. Involve tribal leadership and community perspectives in conversations and decisions around regional food security and food sovereignty. Implement policies that provide economic incentives for prioritizing and localizing the Southeast food system at the regional and community levels. Conduct comprehensive community food system assessments in order to clearly identify needs, resources, and priorities for bolstering local and regional food systems. Build educational opportunities in schools and in communities for respectful wild food harvest

skills learning based on shared values principles established by long-time Southeast Alaska harvesters. Provide regional and local opportunities for networking, education, and skill development related to local food production, processing, and entrepreneurship. Identify underutilized already-developed municipal lands that can be converted into urban farms, high tunnels, and greenhouses, and provide incentives for local farmers and composters. Invest in local and regional value-added food production and processing of local foods that also supports agritourism, and Alaska Native sea otter stewardship, management, and food security programs. Acknowledge the connection between customary and traditional food access, long-term economic prosperity, stewardship of healthy lands and waters, and community health and well-being.

#8: Arts Objective: Increase the recognition of Southeast Alaska's thriving Northwest Coast arts economy

Expand opportunities for Alaska Native and Northwest Coast artists to perpetuate the rich art heritage of Southeast Alaska. Support Buy Alaska Native initiatives, the Alaska Native Arts Programs, the Silver Hand Program, and Buy Alaska. Adopt and support cultural and heritage tourism strategies targeted at making Southeast Alaska the Northwest Coast Native Arts Capital of the world. Support Alaska Native arts and cultural campuses. The arts have played a meaningful role in the economy of this region for thousands of years, and the totems, canoes, masks, regalia, and architecture of Tlingit, Haida and Tsimshian reflect the area's many cultures, ancestries, collective histories, and current identities.

#9: Cultural Wellness Objective: Support the development of activities and infrastructure that promotes cultural wellness and multicultural wellness

Support efforts to construct infrastructure that highlights and promotes Southeast Alaska's many indigenous cultures, and also provides opportunities for education, economic development, social services, and cultural/multi-cultural gatherings. Support efforts to expand cultural growth and wellness. Support the implementation of activities and community involvement that promotes cultural healing, education, and understanding, including language

programs. Support ANCSA established foundations in the region in carrying out their missions and goals of cultural preservation. Support the acknowledgements and activities that identify landscapes and waterways in Alaska as first and foremost the ancestral homelands to the many vibrant and living cultures throughout every area and community. Support the creation, expansion, and collaboration of cultural programs and developments that elevate indigenous communities as leaders in the Indigenous and Cultural Heritage Tourism Industry of Alaska.

#10: Research Objective: Attract science and research jobs to Southeast Alaska

Science and innovation create critical commerce that can contribute to the economic health of our region. Southeast Alaska has a robust array of research facilities relative to its population including the federal research labs (NOAA/NMFS, USFS RD) state labs (UAF SFOS, UAS, ADFG) and nonprofit/private labs. Bring more fisheries science and management jobs to the region. Move the NOAA "Alaska Fisheries Science Center" jobs from Seattle to Alaska. Bring the UAF fisheries jobs to Southeast Alaska.

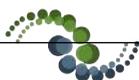
#11: Telework Objective: Promoting the Remote Workforce in Southeast Alaska

Remote work is now a much more viable option, due to the pandemic. With 42 percent of the US labor force currently working from home full time during the pandemic and national companies announcing plans to continue the option of remote work indefinitely, Southeast Alaska, with its access to recreation, should work to capture this market and its economic benefits. Work to welcome remote workers, develop programs, research opportunities, and foster environments where remote workers will thrive.

#12: Manufacturing Objective: Promote Regionally Manufactured Local Product

Promote regionally manufactured local products (art, seafood, beer, wood, ships, handicrafts, etc.). Develop marketing material to market Southeast Alaska as a whole. Support remote workers.

#13: Coast Guard Objective: Support Coast Guard vessel homeporting opportunities. Maintain and grow the Coast Guard presence in the region.



Action Plan Part II: Priority Objective Descriptions & Evaluation Framework

Priority Objective #1

Sustain and Support the Alaska Marine Highway System

Priority Description

Since its first port of call, the Alaska Marine Highway System (AMHS) has been a critical socio-economic engine for coastal Alaska. The Alaska Marine Highway has been pummeled by cuts related to the State fiscal crisis since 2013, and the global pandemic travel disruptions of 2020. In a coordinated effort to restore and strengthen connectivity in the region, the AMHS must provide reliable, basic service to coastal Alaska communities, create an economy of scale, and provide cost effective transportation services. This can be accomplished through the following:

1) Changing the governance model for AMHS – an empowered management structure is needed to execute the Alaska Marine Highway's mission to support rural communities and generate economic growth and improved quality of life for Alaskans; and **2) Implementing the AMHS Reshaping Recommendations** – supporting the State of Alaska as it implements the recommendations from the 2020 Alaska Marine Highway Reshaping Work Group and SEC AMHS Reform Initiative to improve service levels of the AMHS, including the following: improved system reliability; stabilized budget planning; strengthened governance support; renegotiated marine union labor agreements; reduced system costs; increased system revenue; leverage road infrastructure, and create partnerships with communities, Tribes and private sector.

Outline of steps required for project to be completed and timeline

Design strategic plan for AMHS system focused AMHS Reshaping Work Group and reform recommendations. (Plan developed in 8-12 months.)

- Design strategic plan for AMHS system focused on AMHS Reshaping Work Group and AMHS Reform recommendations. (Plan developed in 8-12 months.)
- Define community needs and requirements to determine what constitutes basic essential service (information regarding frequency of service and capacity).
- Work to change the funding cycle and provide forward funding to eliminate uncertainty.
- Work with stakeholders to determine what level of service is necessary for economic development, including frequency of service, capacity, and connectivity within the region.
- Facilitate planning discussions between the private sector, the communities, and the State of Alaska on potential partnerships and efficient transportation service delivery options.
- Use scenarios to envision how the system will look in 20 years.
- Recognize public process and extensive outreach as part of plan development.
- Engage technical expertise to assist as needed.

Restructure and Empower a Marine Governance Board. (Years 1-2)

Support legislative statutory changes and executive action by the Governor to create an empowered management structure. The Marine Transportation Advisory Board (MTAB) consists of 11 members appointed by the Governor. State statutes require the AK DOT&PF to work with MTAB to create reports and recommendations and develop a strategic plan for the Alaska Marine Highway System (AMHS). However, because of the advisory nature of the board, MTAB's input has not become an integral part of AMHS planning and is rarely reached out to by AKDOT&PF.

Create and Implement an AMHS Strategic Plan. (Years 1-5)

AMHS Reshaping and Reform recommendations will be addressed through the development of a strategic plan that to address the following: improve system reliability, improve budgetary planning, increase farebox recovery rate; monetize vessel and shore-side assets and opportunities; optimize fleet configuration; and create a multi-modal transportation system that

leverages road and port infrastructure to change how people and freight move across the state through public-private partnerships.

Develop a Fleet Renewal Plan (Years 1-5)

A viable fleet renewal plan, paired with a more certain maintenance plan, is central to the viability of marine transportation. Move forward with a plan to replace aging vessels, such as the Tustumena.

AMHS Value Outreach (Years 1-5)

Better communicate the value of the ferry system to the public as well as to lawmakers using communication tools such as publications, letters, meetings with lawmakers, news stories, Facebook and website development.

People and Organizations responsible for completing these steps

Southeast Conference, AMHS, Central Council, other ARDORS, Coastal Alaska communities, AML, Administration, Legislature, and private sector transportation partners.

Cost Estimates

\$250K - \$350K

Evaluation Measures

- Southeast Conference meetings on AMHS transportation
- Resolutions and letters of support for operational changes and governance plan
- AMHS Farebox Recovery percentage improvements, revenues raised outside of farebox
- New strategic long-term transportation plan developed
- Ongoing capital program that extends the life of the current fleet while replacing vessels as they become obsolete.
- AMHS ridership
- Private sector investment, transportation service partnerships

Project Champion

Name: Robert Venables

Title: Executive Director

Organization: Southeast Conference.

Priority Objective #2

Mariculture Development

Priority Description

Support development of the mariculture industry, including enhancement, restoration and aquatic farming of shellfish and seaweeds. Work with the Governor's Office to promote regional mariculture objectives. Support implementation of the Alaska Mariculture Development Plan, the Alaska Mariculture Task Force's Five-Year Action Plan, and the Task Force's successor organization (Alaska Mariculture Alliance). Increase shellfish and seaweed production and farming efficiencies. Increase the number of mariculture operations, providing financial and technical support for interested mariculture entrepreneurs. Support the marketing of mariculture products, mariculture eco-tourism and public education efforts. Support increased hatchery capacity and seed production, including stability for operations, technical transfer and workforce development. Support increased capacity of the Alaska Shellfish Authority (ADEC), including capacity and funding for shellfish safety testing in the region. Leverage existing seafood processing capital, including bringing additional seaweed and oyster processing capacity to the region (drying/blanching/sorting). Increase shellfish sorting and packaging capacity in the region. Work with mariculture farmers to develop a frozen oyster product with a viable market. Support development of non-food mariculture products. Support development of multi-use facilities for processing, storing, aggregation and shipment. Support research, community engagement, and education for mariculture in the region.

Outline of steps required for project to be completed and timeline

Expand Financial Support (Years 1-2)

- Expand the ADCCED's Mariculture Revolving Loan Fund for use by farmers and non-profit hatcheries.
- Empower local mariculture entrepreneurs that want to operate small-scale by developing effective and

less risky pathways for financial success (e.g. aggregating, non-vessel infrastructure costs).

- Provide local processors tax breaks and grants for processing.

Support Hatcheries (Years 1-5)

- Identify Hatchery Needs: Develop short-term, mid-term, long-term demand projections, both by region and statewide.
- Support hatchery production expansion for seaweed and shellfish, including facilities, workforce, and operational funding.

Enact Mariculture Legislation (year 1)

Pass state legislation to: 1) allow for shellfish fishery enhancement; 2) allow Alaska Seafood Marketing Association (ASMI) to market aquatic farm products; 3) designate eco-tourism and education as allowable activities at aquatic farms; and 4) align aquatic farm lease renewals with requirements for other similar leases from ADNR.

Identify and Adopt Key Technologies (Years 2-5)

- Identify seaweed processing technology needs and available technology that works best and is most economical. Acquire equipment and implement that infrastructure such as drying and blanching tech, at commercial scale.
- Develop or import technology and techniques to help local Alaskan producers seed and harvest more efficiently, to produce products more efficiently and obtain better and more consistent yield.

Develop New Products (Years 1-5)

- Develop local value-added production and products will provide exponential benefits to the community.
- Develop frozen shellfish products, technology, and marketing structure to move volumes of shellfish into the broader marketplace.
- Identify non-food products and begin working with collaborators on developing these products.

Workforce Development (Years 1-5)

- Collaborate with University. Collaborate to develop a seafood/mariculture conferences in the winter 2022. Work with UAS to expand mariculture classes within the region. Create internship opportunities. Work with high school students. Work closely with UAF and UAS researchers. Collaborate with AK Seagrant in a similar way as with the Universities.
- Create pilot farm training opportunities: Develop hands-on training opportunities, create home grown

training, create access to scholarship funding, work with Alaska Native organizations.

- Build and fund a classroom-to-farm program: Open the minds of Southeast Alaska youth to the possibilities of mariculture. Make connections and pay travel expenses and opportunity costs to bring educators and students for on-farm and hatchery tours.

Develop Marketing, Educational and Research Materials (Years 1-3)

- Develop marketing materials to provide information regarding value-added production opportunities in Alaska, for both assisting local companies in diversification, and to engage and attract out of state companies to invest in and develop value added production capacity in Alaska.
- Develop educational elements for the State of Alaska in order to attract investment and describe local processing potential. Describe the catalysts that would lead to broader growth within sector. Support a dedicated AIDEA official to act as mariculture lead.
- Generate videos and recipes to educate and inspire home cooks in preparing oysters and seaweeds in their own kitchens for consumption.
- Create “Mariculture by the Numbers” describing benefits over time, value added, projections, and economic indicators – a publication of Southeast Conference.

Additional Steps

- Build physical infrastructure to house value added productions and aggregation sites, including shellfish aggregation site, with efficient sorting, packing and shipping technology.
- Seaweed Research. Establish seaweed grading; training materials for hired hands on processing floors or rotations. Identify tank culture of seaweeds needs to support the secondary production of shellfishes (e.g. abalone feed)
- Identify energy needs in remote locations and identify practical solutions.
- Remove barriers to mariculture development: Barriers include access to funding, lack of data/information, access to seed, development of an economy of scale (high transportation costs, awareness of value), product quality, cost of testing, and production pipeline.

People and Organizations responsible for completing these steps

- Alaska Fisheries Development Foundation - Julie Decker, Riley Smith
- Alaska Sea Grant - specific research priorities & funding
- NOAA (Juneau) -- research and regulation for mariculture initiatives
- Premium Aquatics LLC d/b/a Seagrove.
- UAS (Juneau) -- fisheries training/education, networking
- PolArctic -- marine engineers that want to help the industry
- OceansAlaska - hatchery, training and education
- Alaska Mariculture Alliance (AMA)
- Mariculture Research and Training Center (MRTC)
- SE AK municipalities, State of Alaska
- Southeast Conference

Cost Estimates

\$50 million

- Site-based renewable energy to power remote operations: \$3 million
- Educational “prepare at home!” for seaweeds: \$500,000
- Seaweed and oyster processing technology: \$3 million
- Physical infrastructure to do value added facility: \$120,000 (develop business plan, which includes potential physical product flows and associated operational costs and facility design); \$30 million (facility that includes multiple elements, houses value added production)
- Hatchery facility and operations support: \$10 million
- Data, education, marketing: \$1 million
- Workforce development needs: develop a workforce education / recruiting event; pilot farm training platform; classroom to farm program - \$2 million

Evaluation Measures

- Change in industry business confidence – as measured annually in the Southeast Alaska Business Climate Survey
- Number of producing farms
- Site leases (growth)
- Number of stakeholders involved in planning process
- Annual aquatic farm production (value, poundage and species)

- Annual shellfish hatchery production (value, quantity and species)
- Number of businesses working either in aquatic farms or enhanced fisheries (non-salmon)
- Number of employees working either in aquatic farms or enhanced fisheries (non-salmon)
- Number of research projects funded for mariculture
- Deliverables completed

Project Champion

Name: Markos Scheer

Title: CEO

Organization: CEO Premium Aquatics, LLC (Seagrove Kelp Co.)

Priority Objective #3

Market Southeast Alaska to Attract More Visitor Spending and Opportunities

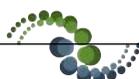
Priority Description

Create regional collaborative partnerships to market Southeast Alaska as a tourism destination. Enhance the reach and effectiveness of existing marketing activities conducted throughout the region and support organizations across the region as they work to develop new marketing strategies and campaigns post COVID. Focus on marketing to draw a diverse array of tourists to the region. Support communities and small businesses in the development of new and expanded products, tours and shoreside excursions. Harness the beauty of Southeast Alaska to create visuals for marketing.

Outline of steps required for project to be completed and timeline

Work Collaboratively to tell the Story of Southeast Alaska to Target Audience (Years 1-3)

- Market Southeast Alaska through regional Community Destination Marketing Organizations (DMOs), Chambers of Commerce, and the Southeast Alaska Tourism Council.
- Create videos for marketing the region.



- Identify markets and create storyboarding and market vision roundtable/ work sessions.
- Create collaborative advertising opportunities for businesses and local DMO's.
- Attract local and in-state tourism within the region. For example, create hiking challenges, use existing art events, festivals, brewing events, running events, birding etc.
- Collaborate, partner, and communicate across region.

Pursue Funding Mechanisms to Support New and Expanding Businesses (Years 1-2)

- Support the creation of sustainable financial models for local tourism businesses to access marketing and educational/membership dollars.
- Support local businesses in creating and expanding shore excursions and selling merchandise and creating ecommerce opportunities.
- Apply for state and federal grants (EDA, USDA, State of Alaska) to provide technical assistance and personnel assistance for small and emerging businesses and communities on marketing.

Develop Regional Outreach Opportunities to Share Best Practices and Experiences (Years 1-5)

- Create and fund workshops to support communities and entities trying to enter into the tourism industry. Support local communities in increasing numbers of visitors coming to their communities. Create models, educational research, marketing education, and support to begin new, sustainable, tourism ventures.
- Use social media to support tourism, recreation, and support local tourism businesses. See example of Juneau's Tourism Voice, and duplicate process across the region.

Support and Leverage the Efforts of the Southeast Alaska Tourism Council (SATC) (Years 2-4)

- Solicit additional participation in SATC and Alaska Travel Industry Association (ATIA).
- Use the Alaska Host Program, and the SATC Branding Toolkit.
- Modify SATC website to better and more attractively list transportation options and encourage travel agencies to advertise. Encourage and assist more transportation companies to join SATC to boost the travel options page.

People and Organizations responsible for completing these steps

- Local DMOs
- Development Corporations/ Councils/ Departments
- SATC
- ATIA
- Chambers of Commerce
- Southeast Conference staff
- Southeast Conference Tourism Committee members and business partners
- BuyAlaska/ Small Business Development Center
- Alaska Department of Commerce, Community and Economic Development

Cost Estimates

\$1.15 million

- Hire collaborative full-time marketing and promotional person within an existing regional tourism entity to work cross-regional to support tourism in Southeast Communities (\$50K-100K).
- Funding for marketing programming implementation (\$250K to \$1 million).
- Workshop Training (\$20,000 to \$50,000).

Evaluation Measures

- Change in industry business confidence – as measured annually in the Southeast Alaska Business Climate Survey
- Total Tourism Jobs (compared to previous years)
- Total Tourism Wages (compared to previous years)
- Total Cruise Ship tourists
- Total passenger arrivals in Southeast (air, ferry, cruise)
- Hotel nights, annually

Panel of Tourism Champions

- Zak Kirkpatrick, Allen Marine
- KC Hostetler, Alaska Airlines
- Carol Rushmore, City and Borough of Wrangell
- Katie Montgomery, Cruise Line Agencies of Alaska
- Kaitlyn Jared, Skagway Development Corporation
- Holly Johnson, Wings Airways

Promote beneficial electrification

Priority Description

Work with utilities to support utilizing a wider range of renewable resources in the region and to develop innovative rates and programs that encourage beneficial electrification by consumers. Work with communities to support consumer adoption of technologies that can be added to the electric system in a manner that increases the value of the grid. The primary opportunities for beneficial electrification in Southeast Alaska include:

- **Heat Pumps:** Support the continued installation of heat pumps in areas with high heating costs and low electric costs. Advances in air-source and ground source heat pump technologies make these methods increasingly practical for providing clean thermal energy while taking advantage of excess electrical capacity in the region.
- **Electric Vehicles (EVs):** Support efforts to minimize barriers that inhibit EV adoption in Alaska. EVs and their charging infrastructure have the ability to bring new industries to the region, helping to promote our economy and save money.
- **Research Emerging Technologies:** Identify opportunities to fund research and testing of technologies that will enable greater integration of renewable energy and better utilization of grid infrastructure. Southeast microgrids offer excellent testing grounds for innovative technologies. The development of these technologies may also have broad value outside of our region and state.
- **Dock Electrification:** Support community electrification port initiatives.

Beneficial electrification is the process of replacing the direct use of fossil fuels with electricity to reduce overall emissions and energy costs. Beneficial electrification allows for more efficient integration of renewable sources of electricity onto the electric grid and better utilization of existing electric infrastructure.

Outline of steps required for project to be completed and timeline

Heat Pumps and Energy Efficiency (1-5 years)

- Meet 5% of the region's demand for space heating with heat pumps (1,000 ASHP installs/year, \$20MM over 5 years, mostly private investment)
- Enhance existing heat pump educational efforts by identifying heat pump demonstration projects in communities throughout the region (Identify and create webpage/flyer for demonstration projects in large communities by 2022 for completed installations - \$1,500, install and create promotional material for demonstration projects in small communities in 2023-2025 - \$20,000)
- Diversify financing and grant options for ASHP's and energy efficiency measures (seek funding from communities for loan-loss reserve to create ASHP lending programs similar to Alaska Heat Smart/TNFCU program in Juneau - \$30,000, support municipal participation in C-PACE in large communities, seek grant funds to support heating efficiency improvements - \$1.5MM)
- Work with property owners to improve the thermal efficiency of multifamily housing (\$5MM)

Electric Vehicles (1-5 years)

- Over the next five years, adopt 10 EVs per week on average across the region (2,600 vehicles total, \$50MM over five years, assumes 50% of vehicles are purchased new, 50% used)
- Install at least 10 DCFC and 100 Level II public charging stations in the region over the next five years. (\$2MM, assumes \$200k/DCFC, \$5,000/L2)
- Obtain at least 10 transit buses or tour coaches in the region over next 5 years (\$8MM)

Additional Elements (1-5 years)

- Beneficial Electrification (BE) Information Webinars and Workshops about EV's and ASHP's. One annually for each community.
- Identify research grants on emerging technologies that apply to the region (obtain \$2MM in research project value over 5 years)
- Electrify one additional cruise ship dock in the region over the next five years (\$10-30MM public private investment)
- Workshops; technical assistance and training (workforce development) for implementation and increased technical expertise capacity.

People and Organizations responsible for completing these steps

- Alec Mesdag, AELP
- Prince of Wales Chamber of Commerce
- Nathan Green, Alaska Center for Energy and Power
- Clay Good - Renewable Energy Alaska Project/ Sustainable Southeast Partnership
- Jason Custer - Alaska Power & Telephone
- Jodi Mitchell- Inside Passage Electric Coop
- Southeast Conference, Robert Venables
- Other SE Utilities

Cost Estimates

\$127 million

- \$35 million public funds, including FTA Low-No Emissions Grant, USDA, state and local government
- \$2 million non-profit funds, pursuing grants, performing research, coordinating regional efforts
- \$90 million private investment, consumer purchase of heat pumps and EVs, utility infrastructure

investment, commercial operator site infrastructure investment

- Consumers, grant funding, utilities, Southeast Conference.

Evaluation Measures

- Change in industry business confidence – as measured annually in the Southeast Alaska Business Climate Survey
- Displaced gallons of fossil fuels
- Number of electric vehicles brought into the region
- Number of public and private EV charge equipment locations
- Number of building permits issued
- Number of workshops and technical assistance offered

Project Champion

Name: Alec Mesdag

Organization: AEL&P

Economic Plan Steering Committee

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Lacey Simpson – 2nd Vice President. Assistant City Manager · Ass. KPU General Manager, City of Ketchikan & Ketchikan Public Utilities
Rorie Watt – Treasurer. City Manager, City and Borough of Juneau
KC Hostetler – Secretary. Regional Sales & Community Marketing Manager, AK Airlines
Alec Mesdag- Director of Energy Service for AEL&P
Jan Hill- Haines Borough
Chelsea Goucher –Owner, Foraged and Found
Bryce Dahlstrom – Vice President, Viking Lumber
Dennis Watson- Former General Manager, Interisland Ferry Authority
Dennis Gray Jr. - City Administrator for City of Hoonah
Kaitlyn Jared – Executive Director, Skagway Development Corporation
Zakary Kirkpatrick – Allen Marine Executive Team, ATIA Marketing

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John Falvey, AMHS, *General Manager*
Carrie Starkey, Ketchikan Chamber of Commerce
Carl Ramseth, Alaska Seaplanes, *General Manager*
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Shannon Adamson, Master Mates & Pilots
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Bruce Lambert, US Maritime Administration, *Pacific NW and Alaska Gateway Director*
Ron Curtis, IFA, *CEO*
Norm Carson , City of Pelican Chamber of Commerce, *President*
Gregory Smith, Boreal Controls, *Founder & President*
Clay Koplín, Cordova Electric, *CEO*
McHugh Pierre, Goldbelt, *President & CEO*
John Waterhouse, Elliott Bay Design Group, *Owner*

Economic Plan Steering Committee

Southeast Conference Committee Members Cont.

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Joanne Schmidt, State of Alaska, *Transportation & Public Facilities Regional Planning*
KC Hostetler, Alaska Airlines, *Sales and Community Marketing Manager*
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Dave Warter, AMHS, *Port of Bellingham Terminal Manager*
Adam Anderson, AML
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Nathan Masters, ACEP
Molly Zurks

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of Health

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Tanguy Libbrecht, American Red Cross in Alaska, *CEO*

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Tracy Harmon, Haines Chamber of Commerce, *Executive
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Will Ware, Central Council Tlingit & Haida Tribes of Alaska

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Jim Floyd, Petersburg Chamber of Commerce, *President*

Craig Dahl, Juneau Chamber of Commerce, *President*

Michelle O'Brien, Ketchikan Chamber of Commerce,
President

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Les Carter, City of Thorne Bay, *City Administrator*

Jon Bolling, City of Craig, *City Administrator*

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Dennis Nickerson, Environmental Planner, Prince of
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Dennis Gray Jr., City of Hoonah, *City Administrator*

Sara Yockey, City of Coffman Cove, *Mayor*

Cheryl Fecko, Craig, AK

Reilly Kosinski, Zender Environmental Health and
Research Group

Waste Logistics and Training Development Specialist

Appendices

Available at www.seconference.org/strategy/

Southeast Alaska by the Numbers (2012 to 2020)

Southeast Alaska Business Climate Survey Analysis (2015 to 2021)

Analysis of Southeast Alaska's Strengths, Weaknesses, Opportunities & Threats

Southeast Alaska Resilience Mapping Weatherizing for the Economic Storm 2021

Getting to 2022 Short-Term Southeast Alaska Resilience Plan

Summary of Southeast Alaska Opportunity Zones 2021

Summary of Southeast Alaska Disaster Recovery Plans 2021

Summary of Additional Southeast Alaska Economic Plans

Solid Waste Management Alternatives 2021

Southeast Alaska Health Care Workforce Analysis December 2019

Southeast Conference Board of Directors and Membership Roster

Event Presentations

Midsession Summit Committee Reports

Southeast Conference Board of Directors Resolutions

**Prior Comprehensive Economic Development Strategy 5 Year Plan & Updates
(2006-2020)**

Southeast Alaska Extended Background Research Document

