

Southeast Alaska 2025 Economic Plan

Southeast Conference's Comprehensive
Economic Development Strategy
2021-2025



Tlingit & Haida



Updated April 2024

Prepared by
Rain Coast Data



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



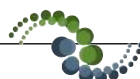
TIMBER INDUSTRY

- 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

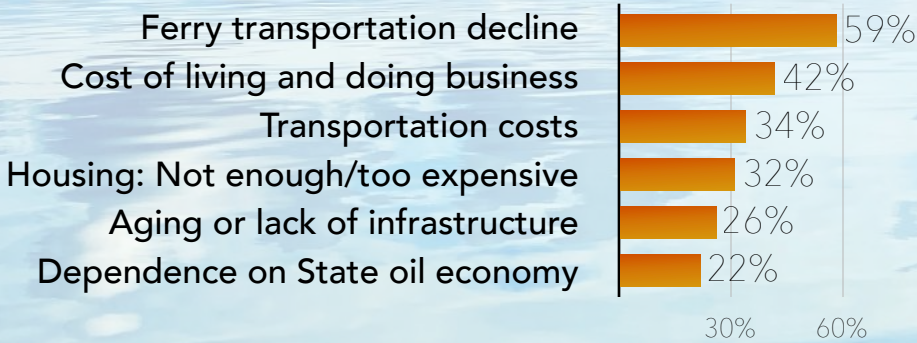


Southeast Alaska's Strengths Weaknesses Opportunities Threats

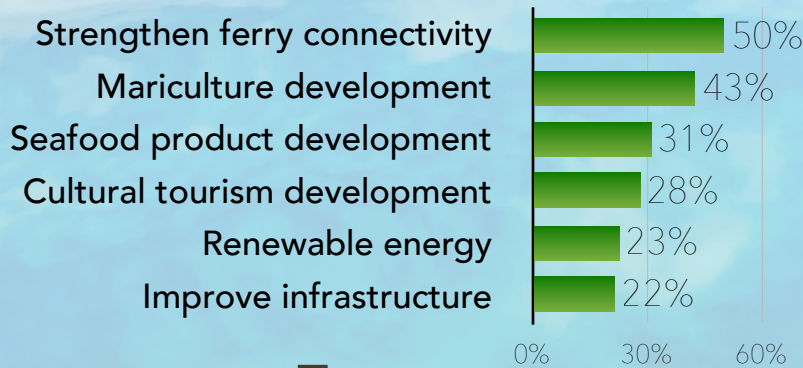
STRENGTHS



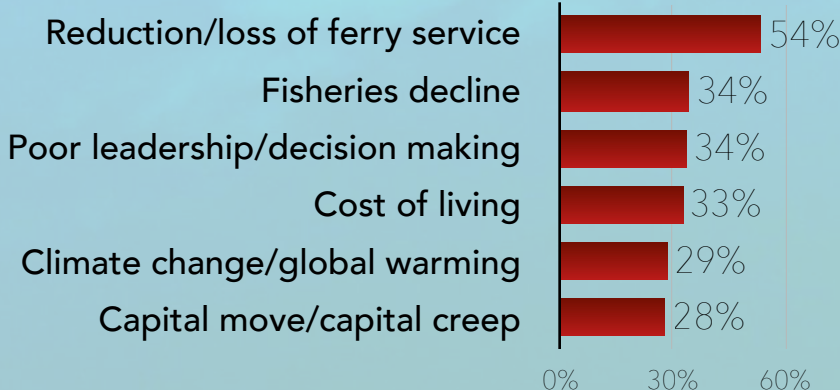
WEAKNESSES



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 2023



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

CHANGES 2021 TO 2022

SOUTHEAST ALASKA'S ECONOMY



THE **LABOR FORCE** INCREASED BY **2,180** **JOBS** TO **44,455** JOBS, **+5%**.



TOTAL WAGES INCREASED BY **\$252** **MILLION** TO **\$2.65** BILLION, **+11%**.



AVERAGE REGIONAL WAGE INCREASED BY **5%** TO **\$59,493** **+\$2,888**.



TOTAL PASSENGER ARRIVALS INCREASED BY **239%** TO **1.65** **MILLION** (INCLUDES RESIDENTS). **+1.16** MILLION DISEMBARKING



VALUE OF SEAFOOD LANDED IN THE REGION INCREASED BY **15%** TO **\$335** MILLION **+\$44** MILLION



BUSINESS CONFIDENCE INCREASED BY **47%** ACCORDING TO THE ANNUAL BUSINESS CLIMATE SURVEY

2022 Southeast Alaska is experiencing an economic renaissance.

Business leaders are reporting the best business climate since business climate surveying began. In 2022 jobs were up by 5%, and wages were up by 11%.

Seafood – the top private sector industry in 2022 – had its most valuable catch since 2014, and the region's value-added seafood products garnered record profits.

Tourism brought 1.16 million more visitors to the region in 2022 than in 2021. As tourism jobs flooded back, visitor-dependent communities saw massive job returns. Jobs in Skagway increased by 41%, while job increases in Hoonah and Gustavus were above 20%.

Employment was up across nearly every sector. Tourism, government, healthcare, retail, construction, professional & business services, and transportation sectors all added workers to their payrolls. Mining and Tribal Government grew by 12% each. Substantial federal investments paved the way for development or rehabilitation of roads, bridges, airports, broadband, harbors, and recreational facilities, generating jobs and much needed community improvements.

Not all indicators are up. State jobs continue to decline, social services are down, overall population decreased slightly, and employment figures remain incrementally below 2019 levels.

2023 Regional business leaders continue to report tremendous

optimism moving forward. In the first half of 2023 more than 600 jobs have been added to the region, and 42% of the region's business leaders expect their prospects to be even better over the next year. Inflation, which hit Alaska hard during the pandemic, came down in 2023. Preliminary figures show that jobs are expected to be up (or flat) in every single sector, except for state government, in 2023.

The region's fishermen are on track for a solid seafood harvest, but struggle with low salmon prices.

Tourism is booming. The number of cruise passengers arriving in the region in 2023 is on track to be 44% higher than 2022 levels and will be record setting by every measure, as nearly 1.7 cruise ship passengers are expected to visit. Tourism jobs were up by 7% in the first half of the year. Juneau was named the #3 best city in the US for summer jobs, due to the prevalence and quality of jobs for 16–24 year olds.

Continued long-term growth is dependent on the region's ability to respond to housing and childcare shortages that threaten workforce attraction and retention. Leaders must establish sustainable strategies to ensure that the federal investments currently bolstering our economy will continue to have long-lasting impacts on the region.

SOUTHEAST ALASKA REGIONAL OVERVIEW

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

Southeast Alaska Land Ownership

Circle size = Number of Acres

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

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. Alaska's Native peoples 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.

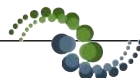
ECONOMIC TRENDS

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 early 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 loss of nearly 1,400 State of Alaska jobs in the region, a 25% cut, stymied recovery. The regional economy was decimated in 2020 as the pandemic wiped out the tourism season and an extremely poor 2020 salmon season exacerbated the economic losses. However, by 2023 jobs, tourists, fish, and wages are back, as the region enters a period of economic prosperity.

LAND OWNERSHIP

A lack of privately-owned land and accessible 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: Mask by Mike Dangeli. Tongass photo by Ken Gill.



JUNE PANDEMIC ECONOMICS

Change in June 2023 Jobs compared to June 2019 Levels: **-2,000 jobs**

June SE jobs down **5%** Over 2019 pre-pandemic levels

In June 2023 the regional job numbers remained 2,000 below June 2019 levels, a 5% jobs deficit, primarily due to a combination of worker scarcity and continued state sector job cuts.

Comparatively, the US as a whole has fully recovered and was 3.5% above pre pandemic job rates in June, while Alaska remained 2% below 2019 employment levels.

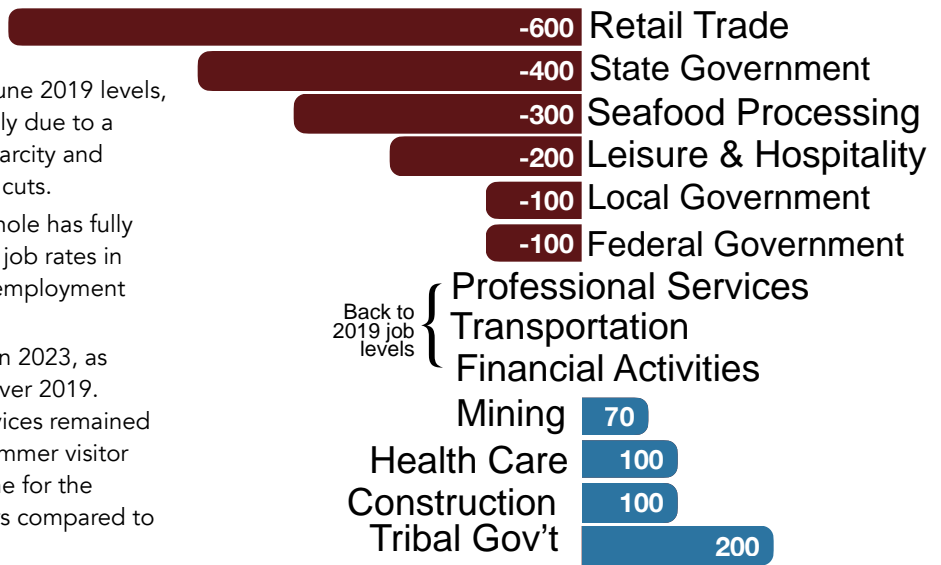
Demand for worker services was even higher in 2023, as tourism visitation is up by an estimated 27% over 2019. However, businesses that provide tourism services remained unable to attract sufficient staffing for peak summer visitor levels in 2023, leading to a 800 job gap in June for the combined retail, leisure, and hospitality sectors compared to June 2019.

State government is the only sector that increased job cuts following peak pandemic losses. By June of 2023, state jobs were down by 9% over June of 2019, a loss of 400 jobs. Local and federal government each remain 100 jobs below 2019 levels.

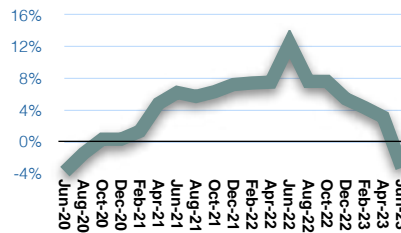
Four key sectors had higher levels of staffing in June 2023 than in 2019. Tribal government jobs were up by 20% (+200 jobs), health care and construction were each up by 100 workers, and mining jobs were up by 9% (+70 jobs).

Note that 2023 numbers are preliminary. Self-employment data for this dataset is not available and has not been included in this analysis.

June 2023 versus June 2019 job counts

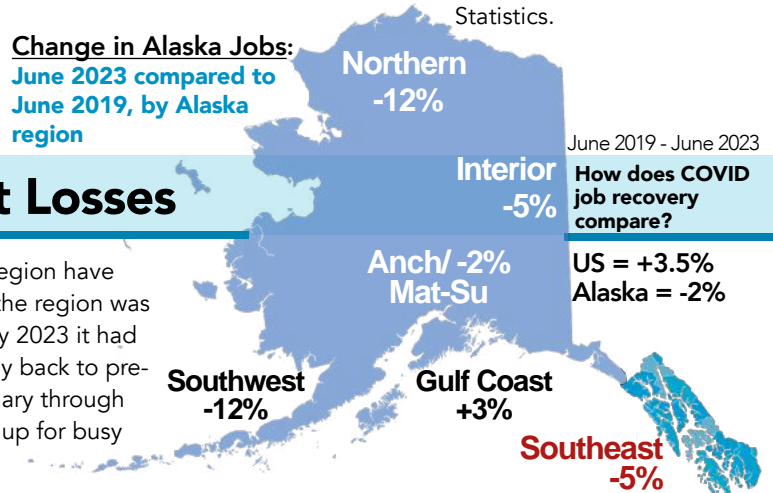


Alaska INFLATION June 2020 to June 2023: % change by year



After rising precipitously post 2020, Alaska's urban inflation levels have dropped. From June 2022 to June 2023, CPI fell 3.3% as food prices fell 19%, and energy prices decreased 16%, according to the Bureau of Labor Statistics.

Change in Alaska Jobs: June 2023 compared to June 2019, by Alaska region



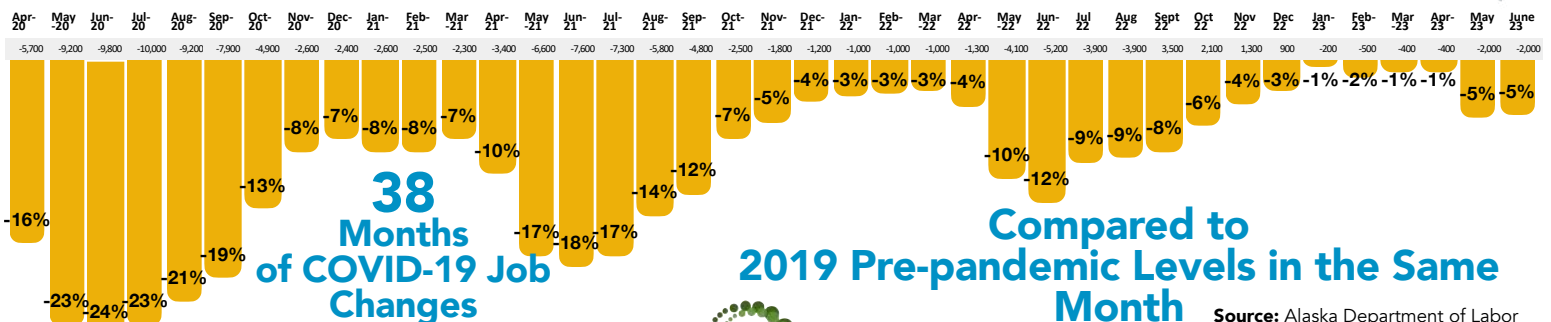
June 2019 - June 2023

How does COVID job recovery compare?

US = +3.5%
Alaska = -2%

Southeast COVID-19 Employment Losses

Since the pandemic hit Alaska in March of 2020, jobs in the Southeast region have been down acutely, 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 2023 it had appeared that Southeast had almost made a full recovery and was nearly back to pre-pandemic levels, with jobs down just 1-2% over 2019 job numbers January through April. But the visitor sector continues to struggle as it attempts to ramp up for busy summer seasons. June 2022's jobs came in at 5% below 2019 levels.



CHANGE IN THE LAST YEAR: 2021 to 2022

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

DEMOGRAPHICS	2022	2021	% CHANGE 2021-2022	CHANGE 2021-2022
Total Population ¹	72,218	72,683	-0.6%	-465
Under Age 15 ²	12,521	12,824	-2%	-303
Twenty-somethings ²	7,629	8,038	-5%	-409
Ages 65 and older ²	13,315	12,664	5%	651
UAS Enrollment	2,148	2,206	-3%	-58
K-12 School District Enrollment ³	10,721	10,843	-1%	-122
GENERAL ECONOMIC CONDITIONS				
Total Labor Force (jobs, includes self-employed & USCG) ^{1,5,6}	44,455	42,275	5%	2,180
Total Job Earnings ^{1,5,6}	\$2.65 million	\$2.39 million	11%	\$252 million
Total Private Sector Payroll ^{1,6}	\$1.80 billion	\$1.58 billion	14%	\$224 million
Average Annual Wage ¹	\$59,493	\$56,605	5%	\$2,888
Annual Unemployment Rate ¹	3.6%	6.1%	-2.5%	-2.5%
TOP ECONOMIC SECTORS				
	2022	2021	% CHANGE	CHANGE
GOVERNMENT				
	PUBLIC SECTOR: 32% OF ALL EMPLOYMENT EARNINGS			
Total Government Employment ^{1,5}	12,644	12,586	0%	58
Federal Employment ^{1,5} (8% of all employment earnings)	2,019	2,037	-1%	-18
State Employment ¹ (14% of all job earnings)	4,334	4,403	-2%	-69
City and Tribal Employment ¹ (14% of all job earnings)	6,291	6,146	2%	145
Total Government Payroll (includes USCG) ^{1,5}	\$842.7 million	\$814.5 million	3%	\$28 million
State of Alaska Payroll ¹	\$289.1 million	\$287.6 million	1%	\$1.5 million
VISITOR INDUSTRY				
	KEY INDUSTRY: 9% OF ALL EMPLOYMENT EARNINGS			
Total Visitor Industry Employment ^{1,6}	6,569	6,252	5%	317
Total Visitor Industry Wages/Earnings ^{1,6}	\$241.9 million	\$226.4 million	7%	\$15.5 million
Total Southeast Alaska Passenger Arrivals	1,652,223	487,831	239%	1.16 million
Cruise Passengers ¹⁰	1,178,123	124,600	846%	1.05 million
Total Air Passenger Arrivals from Outside SE ¹¹	465,299	357,222	30%	108,077
Total AMHS Passengers from Outside SE ¹²	8,801	6,009	46%	2,792
COMMERCIAL FISHING & SEAFOOD INDUSTRY				
	KEY INDUSTRY: 11% OF ALL EMPLOYMENT EARNINGS			
Total Seafood Employment (includes fishermen) ^{1,6}	3,653	3,919	-7%	-266
Total Seafood Employment Earnings ^{1,6}	\$301.8 million	\$291.0 million	4%	\$10.8 million
Commercial Fishing Boats Homeported in SE ¹⁵	2,624	2,793	-6%	-102
Value of Seafood Processed ⁷	\$892 million	\$674 million	32%	\$218 million
Pounds Landed (commercial seafood landed pounds by SE residents) ⁸	246 million	266 million	-8%	-20 million
Estimated Gross Earnings (ex-vessel value of pounds landed) ⁸	\$335 million	\$291 million	15%	\$44 million
HEALTH CARE INDUSTRY (PUBLIC & PRIVATE HEALTH)				
	KEY INDUSTRY: 10% OF ALL EMPLOYMENT EARNINGS			
Health Care Employment ^{1,6}	3,538	3,506	1%	32
Health Care Wages ^{1,6}	\$271 million	\$250 million	9%	\$21 million
MARITIME ECONOMY (Includes employment from all industries)				
	KEY INDUSTRY: 16% OF ALL EMPLOYMENT EARNINGS			
Private Maritime plus USCG Employment ^{1,5,6}	5,429	5,616	-3%	-187
Private Maritime plus USCG Wages ^{1,5,6}	\$450 million	\$416 million	8%	\$34 million
OTHER SELECTED STATISTICS				
	2022	2021	% CHANGE	CHANGE
Construction Employment ^{1,6} (6% of all employment earnings)	2,038	2,026	1%	12
Mining Employment ¹ (5% of all employment earnings)	1,002	898	12%	104
Price of Gold ⁷	\$1,800	\$1,799	0.1%	\$1
Total Southeast AMHS Ridership ¹²	113,868	76,947	48%	36,921
Cost of Living: Consumer Price Index ¹	256.42	237.19	8%	19
Housing Units Permitted/Completed ^{4,1}	251	318	-21%	-67
Avg. Daily Volume ANS Oil Production (mbbls/day) ¹⁴	485,193	477,110	2%	8,083
Annual Avg. Domestic Crude WTI Oil Prices (in \$/Barrel) ¹⁴	\$100	\$71	41%	\$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; ⁹Cruise Line Agencies of Alaska; ¹⁰US Bureau of Transportation Statistics (BTS); ¹¹US Bureau of Transportation Statistics (BTS); ¹²Alaska Marine Highway System data; ¹³Alaska Department of Revenue Crude Oil and Natural Gas Prices; ¹⁴Commercial Fisheries Entry Commission.

The Whole Southeast Alaska Economy 2022

In 2022, Southeast Alaska gained more than 2,000 year-round equivalent jobs and \$251 million in workforce earnings compared to 2021.

Annual Average Jobs

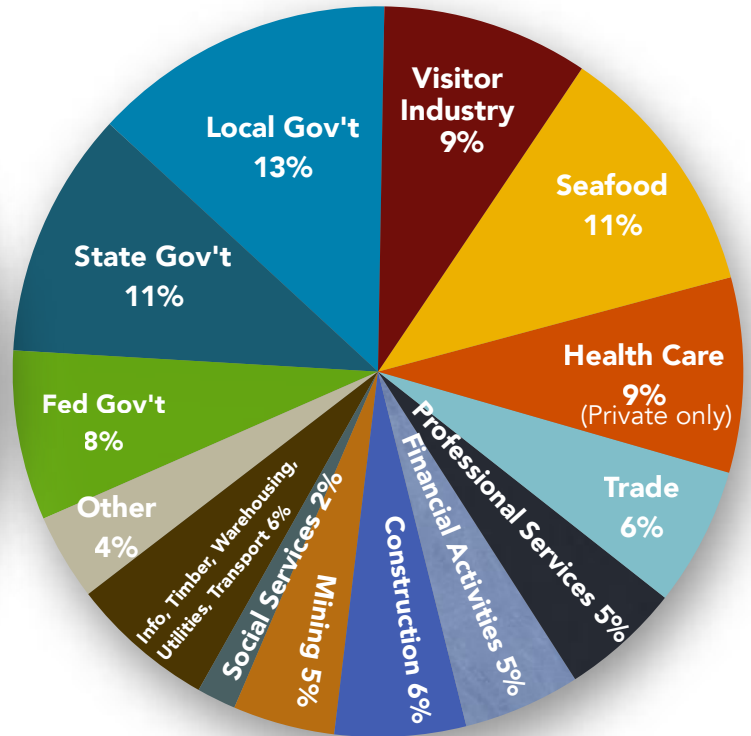
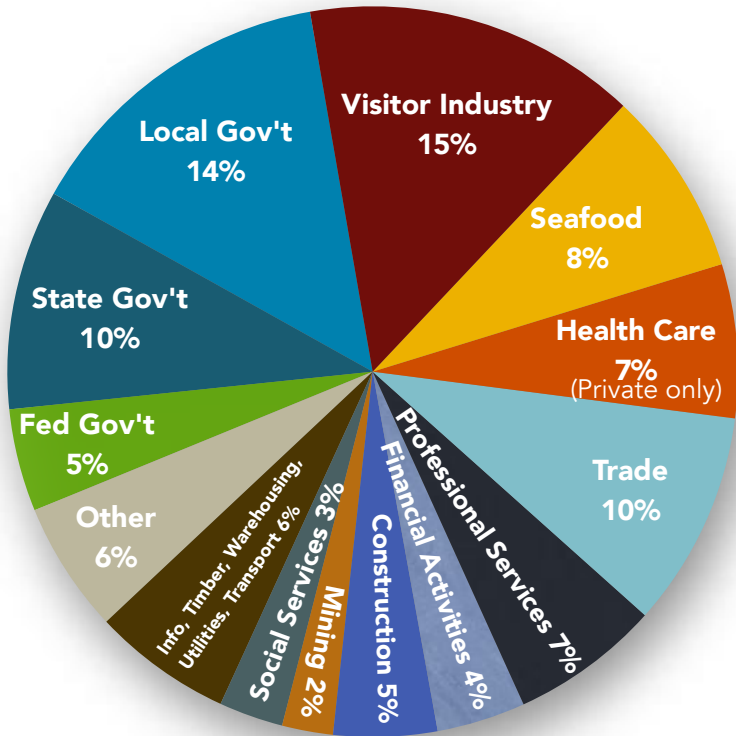
44,452 Jobs

UP 2,180 JOBS IN 2022 +5%

Employment Earnings

\$2.65 Billion Workforce Earnings

UP \$252 MILLION +11%



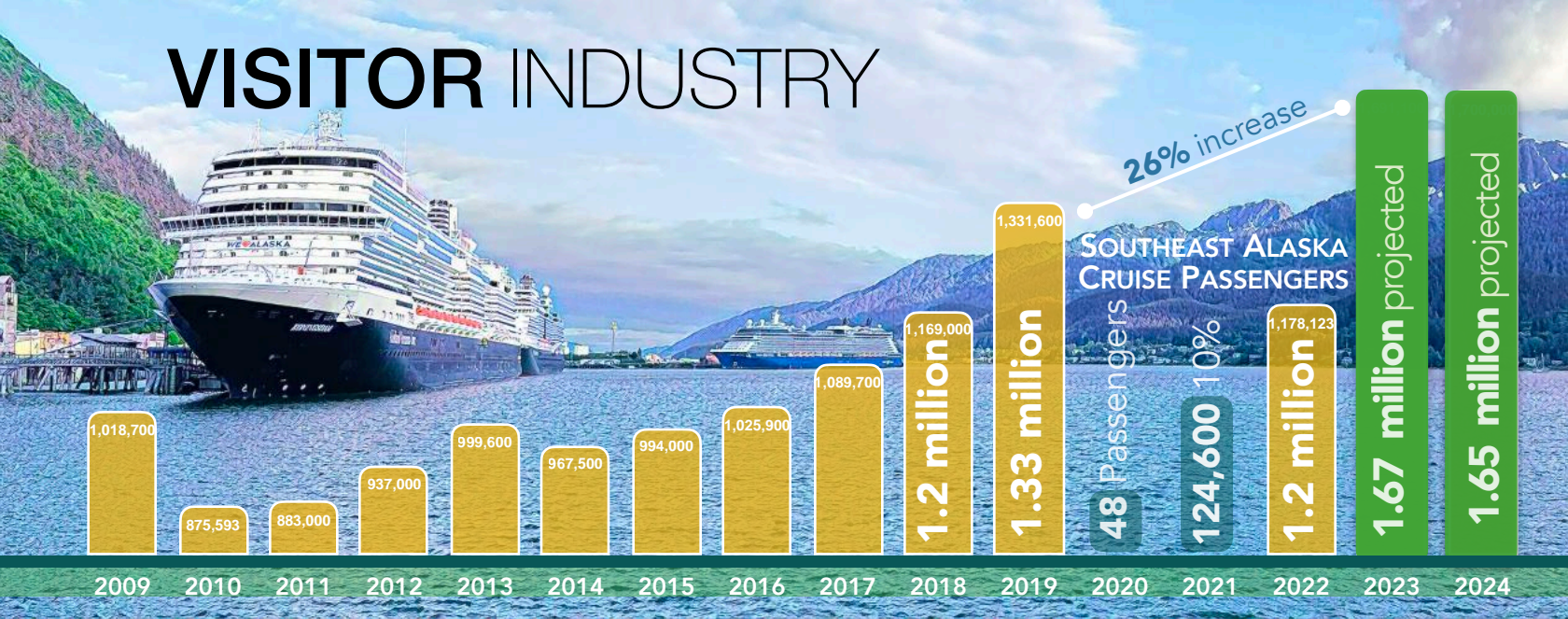
2022 Southeast Alaska Employment Earnings

	EMPLOYMENT RELATED EARNINGS			EMPLOYMENT NUMBERS			Change 2021 to 2022
	Wages (2022)	Self-Employment Earnings (est.)	Total Earnings	Annual Average Employment (2022)	Self-Employed (est.)	Total Employment	
Government (includes Coast Guard)	\$774,044,339	\$68,695,377	\$842,739,716	11,989	655	12,644	58
Visitor Industry	\$215,092,806	\$26,802,000	\$241,894,806	5,734	835	6,569	317
Seafood Industry	\$87,680,259	\$214,122,535	\$301,802,794	1,414	2,239	3,653	-266
Trade: Retail and Wholesale	\$139,344,896	\$23,475,000	\$162,819,896	3,721	533	4,254	52
Health Care Industry (private only)	\$212,401,285	\$15,771,000	\$228,172,285	2,750	273	3,023	69
Construction Industry	\$109,612,684	\$43,936,560	\$153,549,244	1,428	610	2,038	12
Financial Activities	\$60,569,617	\$76,544,000	\$137,113,617	998	748	1,746	-2
Professional and Business Services	\$91,628,663	\$48,742,000	\$140,370,663	1,632	1,305	2,937	261
Mining Industry	\$119,006,946	\$413,000	\$119,419,946	995	7	1,002	104
Social Services	\$41,836,698	\$4,109,000	\$45,945,698	1,071	194	1,265	-117
Information	\$22,026,520	\$1,389,000	\$23,415,520	418	61	479	51
Timber Industry	\$17,037,720	\$2,315,000	\$19,352,720	242	53	295	-17
Warehousing, Utilities & Non-Visitor Transportation	\$107,663,102	\$19,140,000	\$126,803,102	1,649	319	1,968	998
Other	\$65,542,410	\$35,838,000	\$101,380,410	1,580	1,002	2,582	659
Total	\$2,063,487,945	\$581,292,472	\$2,644,780,417	35,621	8,834	44,455	2,180

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

6,570 Annualized Jobs
\$242 Million in Wages in 2022

JOBS UP 317 JOBS IN 2022
EARNINGS UP BY 7% +\$16M

2022 More than a million and a half passengers arrived in Southeast Alaska by air, ferry, and cruise ship in 2022. Cruise passenger numbers grew by 1.1 million passengers, nearly a 10-fold increase from 2021. Airline passengers increased by more than 100,000. Total ferry passenger traffic was up by nearly 37,000. The 2022 season was Southeast Alaska's first "normal" tourism season since the pandemic hit, with cruise passenger numbers similar to 2018. The 2020 cruise season was virtually nonexistent, while the 2021 season represented just a tenth of a season.

In 2022, visitor sector jobs increased by 5% over 2021 to 6,570, and wages increased by \$16 million. Those working in the visitor industry earned \$242 million in 2022, comprising 9% of all regional employment income. However, the tourism sector was still lagging as an economic driver for the region. Pre-pandemic, in 2019, it comprised 12% of all regional wages.

2023 BUSINESS LEADERS SURVEY

By all accounts 2023 has been a very good year for tourism businesses, and by extension, the regional

economy. In spring 2023, business leaders from the tourism, food, and beverage sectors reported a strong economic climate. The majority (55%) expected their business operations to be even stronger headed into 2023 and 2024, including 23% saying their outlook was much better for the coming year. The rebound of the visitor industry is partially due to federal intervention. One-third of tourism business leaders said they would have closed permanently without federal pandemic relief funding.

BIGGEST CRUISE SEASON EVER IN 2023

After 3 years of cruise volatility, 2023 is emerging as the region's biggest cruise ship season ever. While in 2022 the ships were only 74% full, in 2023 ships are back to full capacity, and are expected carry 1.69 million passengers by the end of this summer — 27% more than in 2019.

"We are halfway through the season, but 2023 is clearly going to be our best year ever."

Tourism businesses are reporting revenue records, and are becoming competitive with other sectors for workers, as visitor sector wages increase. Tourism jobs in Southeast Alaska increased by 7% in the first half of 2023, adding nearly 500 jobs.

TOURISM JOBS ARE STILL LAGGING

Despite a significant increase in visitors, the tourism workforce was still slightly below June 2019 levels by June of 2023. Attracting the workforce volume sufficient to serve visitors has been a challenge for regional businesses. More than three-quarters of tourism business leaders blame lack of

housing in the region for stymying workforce numbers; while two-thirds pointed to a lack of childcare.

JET PASSENGERS

Total air passenger arriving from outside Southeast surged by 30% in 2022 and continue to increase. In the first half of 2023 total air passenger arrivals for the region were 8% above 2022 levels. June 2023 was the best June on record for passenger arrivals in the region, surpassing the previous record set in June 2018 by 3%.

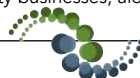
2024 VISITOR STABILITY EXPECTED NEXT YEAR

Moving into 2024, regional cruise ship passenger numbers are expected to be similar to the 2023 season. While some larger ships will visit in 2024, the overall visitation count will be lower. Juneau will begin enforcing a 5-ship-per-day limit, a recommendation of the community's Visitor Industry Task Force, and agreed to by the industry. This change will essentially cap significant overall cruise passenger growth to the region. The 2024 season will be similar in volume, but slightly longer. The cruise ship season is expected to run a full seven months — early April though the end of October — with 50 ships making nearly 660 voyages to the region.

2024 CRUISE SCHEDULE

Total ships	50
Total voyages planned	660
First ship	April 8
Last ship	October 26

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 2022

Municipal 5,044 Jobs +10
State 4,334 Jobs -69
Federal 2,019 Jobs -18
Tribal 1,247 Jobs +135

Government

12,644 Annualized Jobs in 2022 5,600

UP 58 JOBS IN 2022
WAGES UP BY 3%, \$28 MILLION

2022 Government wages made up 28% (12,644) of the

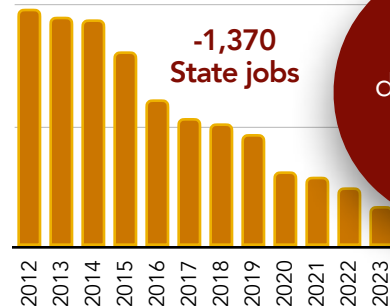
region's jobs in 2022, and 32% of all regional employment earnings (\$843 million). Overall public sector wages grew by \$28 million in 2022, an increase of 3%, while government jobs grew by less than one percent.

STATE GOVERNMENT LOSSES

For the past decade, the region's state government sector has suffered from a prolonged reduction of Southeast jobs. From 2012 to 2022, state jobs have fallen by 25%, a decline of 1,370 annualized workers, representing \$91 million in lost wages annually. Outside the region State jobs were down by 12% over the same period.

Southeast State Jobs

State jobs in the region are down for the 11th year in a row, for a total of 1,370 jobs lost since 2012, a decline of 25%



economic stability. Continued federal expenditures in the form of infrastructure and broadband investments have been critical for restoring the regional economy. Federal jobs were down slightly in 2022. Early 2023 jobs data indicate that federal employment numbers will be similar to 2022.

LOCAL GOVERNMENT

After a 5% loss in 2020, local government employment has remained relatively stable, increasing by 10 jobs in 2022. In the first half of 2023, employment numbers were up by 30 jobs. The primary elements that make up local government include public administration —accounting for 44% of all city workers; 40% in education, just over 2,000 workers in Southeast; and 16% health care workers. In 2022, elementary and secondary schools decreased by 24 jobs, -1%.

THRIVING TRIBAL GOVERNMENT

The sector with the most significant growth between 2021 and 2022 was the region's tribal governments. Tribal government staff grew by 12% – 135 jobs – to 1,247 annualized workers, representing a 38% staff increase in 6 years. Tribal government wages increased by 20% from 2021 to 2022, to \$70.3 million, an increase of \$12 million. Tribal government now makes up 10% of all government jobs in the region, and 3% of all Southeast jobs.

PERMANENT FUND CONCERNS

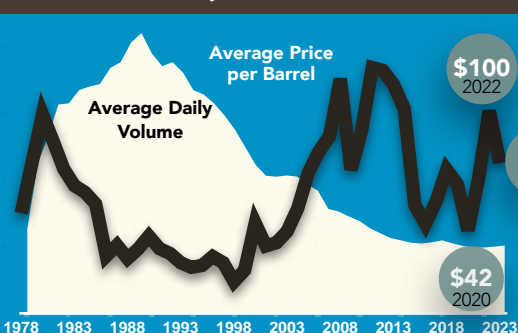
Alaska's revenue structure is dependent on fluctuating oil prices and, following a 2018 legislative amendment, on permanent fund earnings. The Alaska Permanent Fund, which contributes more than half of the State's general fund revenue, has been posting negative returns for the first time in a decade, including a \$6 billion loss between the end of 2021 and mid-2023. Future forecasts are also concerning. Without sufficient earnings the fund will be unable to pay for state services or dividends by 2026. Such an outcome would lead to job, service, and financial losses within the region.

FEDERAL GOVERNMENT

In 2020 when the regional economy crashed, the federal government provided hundreds of million in grants and loans to the region. This funding was funneled into regional households, businesses, service providers, tribes, and communities, and proved to be instrumental in restoring

Sources: ADOL Employment and Wage data; Alaska Department of Revenue Crude Oil Prices. Alaska Office of Management Budget. Photo credit: Michael Penn and UAS

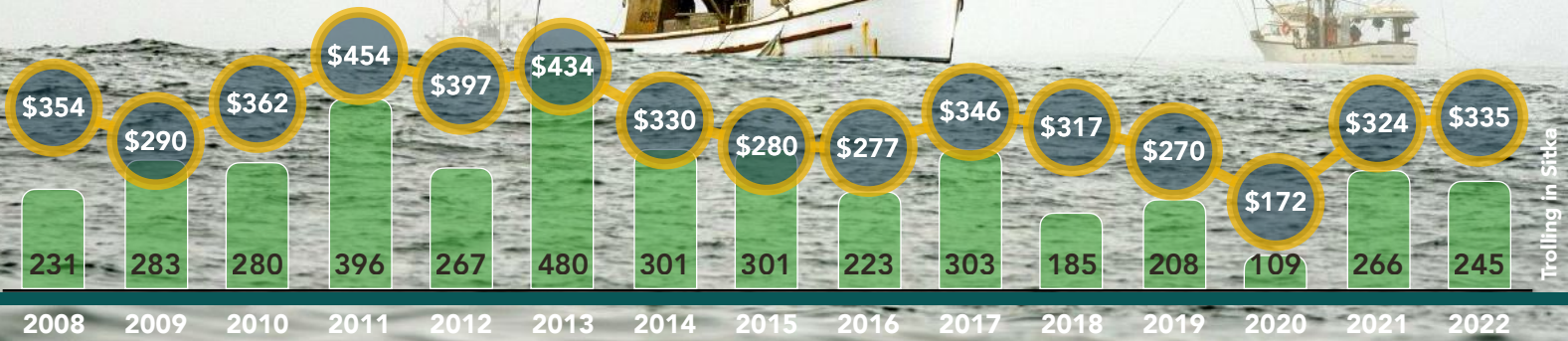
Avg. Daily Volume of the Trans Alaska Pipeline System and Inflation Adjusted Price Per Barrel, 1978-2023



SEAFOOD

VALUE & POUNDS OF SEAFOOD LANDED IN SOUTHEAST ALASKA

Inflation Adjusted
 ● Value to Fishermen (millions)
 ■ Landed Pounds (millions)



Trolling in Sitka

Seafood Industry

3,650 Annualized Jobs 2022

DOWN 266 JOBS IN 2022

EARNINGS UP BY 4%

2022 The seafood sector had a huge year in 2022 and was the top private sector wage provider in the region for the second year in a row.

In 2022, regional fishermen caught 245 million pounds of seafood, with a value of \$335 million. The harvest value was extremely strong. The 2022 harvest represented the most valuable catch since 2017, with the overall gross value of the catch up 15%, a \$44 million increase over 2021.

The overall harvest by pounds landed was the best even-year harvest since 2014. It is important to compare even years to even years due to the distinct two-year pink salmon life cycles. Fishermen caught 20 million fewer pounds of seafood in 2022 than they did in 2021. This includes 66 million fewer pounds of pink salmon, due to it being an even year.

Excluding pink, the regional harvest was up by 35% by weight over 2021.

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 Rafe Hanson Photography.**

Overall jobs were down slightly, as fewer workers are traditionally needed in even years.

In 2021, the five salmon species represented two-thirds of the regional seafood catch by pounds landed, and slightly more than half the overall value. Halibut, black cod, crab, and the dive fisheries accounted for just 10% of pounds landed, but more than a third of the total harvest value. The majority of the statewide catch of Chinook, coho, chum, shrimp, Dungeness crab, and the dive fisheries typically occurs in Southeast Alaska.

KEY ECONOMIC DRIVER

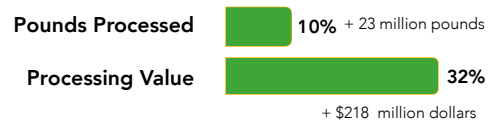
The regional seafood industry (including commercial fishing and seafood processing) generated 3,653 annual regional jobs and \$302 million in earnings in 2022, making up 11% of earnings and 8% of the jobs in the

region. The 10-year Southeast seafood harvest averages are 262 million pounds, and an inflation adjusted value of \$308 million.

SEAFOOD PROCESSING

The region had its most valuable processing year ever. In 2022, shore-based seafood facilities in Southeast Alaska processed 258 million pounds of seafood in the region, with a wholesale value of \$892 million, including shorebased processors and direct marketers.

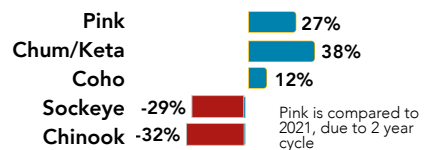
SE Seafood Processing: 2021 vs. 2022



2023 The 2023 harvest-to-date has been good. In ASMI's August 2023 update, salmon harvests were up 28% overall, with the pink harvest expected to be well above forecast levels.

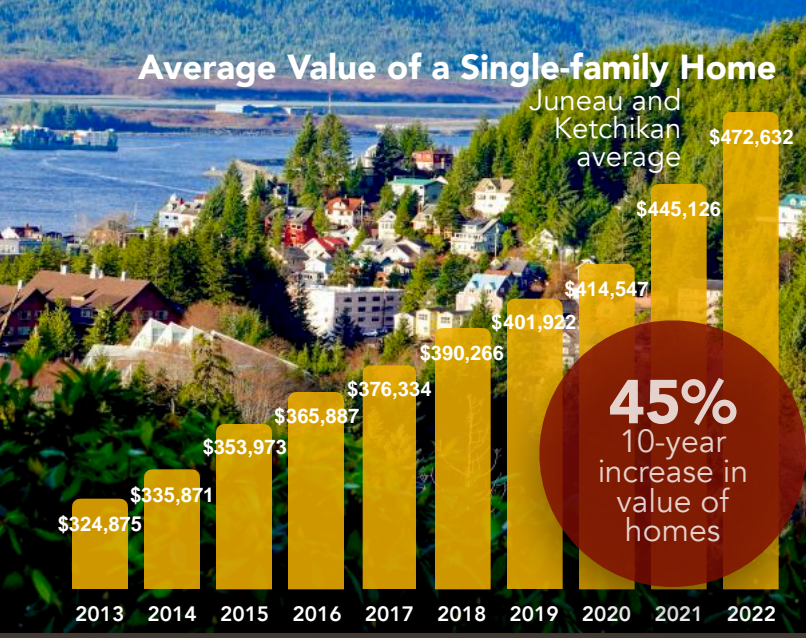
SE Salmon Catch: 2022 vs. 2023

Year over year: week 32



Despite solid harvest returns, 2023 has been a challenge for regional fishermen. An effort to ban the troller fleet from fishing for chinook salmon was nearly successful and would have disproportionately impacted rural Southeast communities. Also, the ongoing Russia-Ukraine war is contributing to an over-abundant global salmon supply, leading to decreased prices across all species, with especially dismal chum prices.

THE 2022 SOUTHEAST CATCH				
COMPARED TO THE 2021 CATCH IN MILLIONS				
Species	2021 Pounds Landed	2022 Pounds Landed	2022 Catch Value	2022 Increase in Value
Chum Salmon	49.2	74.5	\$97.9	86%
Pink Salmon	134.3	68.3	\$36.0	-42%
Herring	32.6	51.8	\$9.6	63%
Black Cod	12.3	15.9	\$54.6	42%
Coho Salmon	9.2	8.6	\$22.0	14%
Halibut	7.8	7.4	\$54.4	10%
Sockeye Salmon	6.4	6.8	\$14.3	14%
Chinook	2.5	3.0	\$17.8	15%
Geoduck, Sea Cucumbers, Urchins	2.6	2.0	\$8.9	-49%
Crab	4.8	3.3	\$16.0	-24%
All Other	4.3	4.4	\$3.6	-39%
Pounds	266 million	246 million	\$335 million	\$44 million



Housing Indicators

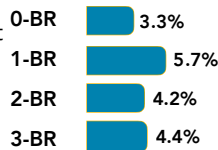
Half of business leaders say that the lack of housing is a **significant** barrier to their business. Hoonah and Sitka report the most acute housing shortages, followed by Ketchikan and Skagway. Two-thirds of regional business leaders say that housing costs are too high for their workers.

Housing Affordability: Nearly 1/3 of Southeast Alaskans cannot afford their homes. The definition of being housing-cost-burdened is spending more than 30% of a household income on housing related costs. According to data from the American Community Survey, in Southeast, 31% of all households were cost-burdened in 2021. Analysis shows that 44% of renters in Southeast are housing-cost-burdened, including 52% of Sitka and Ketchikan renters, while Juneau has the highest overall housing costs. The cost of a single-family home in the region has increased by 45% in the last decade, while the average regional wage increased by 22% over the same period.

Housing Availability: A weakness in the Southeast Alaska economy is a lack of sufficient housing units to meet demand. Two-thirds 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.

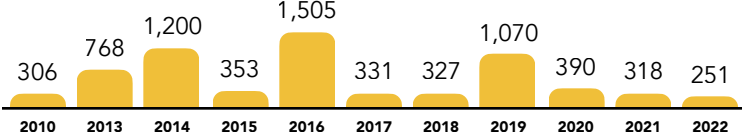
Rental Housing: Based on a 2022 survey of 1,800 rental units in the region by the Alaska Department of Labor, the overall rental vacancy rate was 4.6%, while in Juneau it was even lower at 3.7%. Efficiency apartments have the lowest vacancy rates, at 3.3%. A healthy vacancy rate is considered to be approximately 8%.

2022 SE RENTAL VACANCY RATES



New Housing: In the past 10 years, Southeast communities added more than 6,500 new permitted housing units — including nearly 1,300 single-family homes, 400 multi-family homes (2-4 units), and 600 apartment units. However, 2022 marked the lowest year of new housing development in years, with just 251 new units permitted.

SOUTHEAST NEW HOUSING PERMITS BY UNITS



Sources: ADOL Employment and Wage data; Quarterly Alaska Housing Unit Survey, a survey of local governments and housing agencies; US Census; Zillow. Kitco Metals Inc; Coeur Mining Inc. Annual Report; Hecla Mining Company Annual Report.

Mining Industry

1,002 Annualized Jobs in 2022

UP 104 JOBS IN 2022, JOBS/WAGES UP BY 12%

2022

The mining sector is growing steadily. Mining jobs and wages in Southeast Alaska were up by 12% in 2022, and has doubled since 2010. The average annual mining wage was \$119,200 in 2022, more than twice the overall regional wage of \$59,000.

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

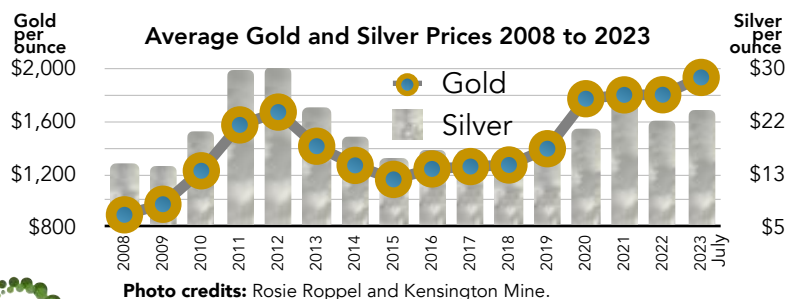
- **Hecla Greens Creek** is one of the largest silver mines in the world. In August 2023, Hecla Greens Creek had 506 full-time permanent employees (+32 from 2022) and continues to ramp up production and employment. Greens Creek is the largest private sector employer in Juneau as well as the highest taxpayer at \$2.4 million per year in property and sales taxes. In 2022, Greens Creek produced 9.1 million ounces of silver.

- **Coeur Alaska's Kensington Mine** is exclusively a gold mine. Kensington had a production of 109,000 ounces of gold in 2022. In 2023, Coeur Alaska Kensington had a full-time permanent staff of 383 (-20 from 2022). Over the last five years, the Company has invested approximately \$245 million in exploration, increasing reserves.

- **Dawson Mine** is a smaller gold and silver project on Prince of Wales. Dawson Mine reported 54 full-time workers in 2022.

Additional 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.

Mining jobs in Southeast Alaska have increased by 3% in the first half of 2023. Metal prices continue to be strong.



CONSTRUCTION

HEALTH CARE



Road Construction in Hoonah



Construction Industry

2,040 Annualized Jobs in 2022

JOBS UP 12 IN 2022, WAGES UP BY 8%

2022

For the third year in a row, construction employment was up. Construction jobs increased by 1%, while wages grew by 8% in 2022. Construction workers in the

region earned \$154 million, representing 6% all regional workforce earnings in 2022. Early data shows construction jobs increased by another 1% in the first half of 2023. Sector growth is limited by a lack of workers, not projects. The passage of the Federal Infrastructure Investment and Jobs Act (IIJA) has led to large construction projects in Southeast, but local firms must compete statewide and nationally for workers as similar investments into infrastructure projects are occurring across the US. Local leaders point to say that transportation, difficulty with licensure, and lack of childcare make it even harder to compete.

“There are plenty of opportunities. The outlook would be good if we could find more workers.”

By July 2023, IIJA awards totaling \$220 million for work in 27 Southeast communities had been announced, with the potential of millions more if organizations and communities continue to successfully apply for available funding to support the region’s roads, bridges, ports, airports, energy grids, communication systems, and ferries. In Southeast in 2023, a partial list of grants for federal infrastructure act funding includes:

- **Roads and bridges:** \$130.3 million (including the Haines highway reconstruction for \$30.3 million; Juneau N. Douglas Crossing \$16.5 million; and Kake Access \$10 million)
- **Airport** infrastructure: \$27.2 million
- **Recreation:** \$14.4 million
- **Transit:** \$11.3 million
- **Tribal Broadband** Connectivity: \$11 million
- **Harbors:** \$7 million

Statewide, \$286 million has been awarded to the Alaska Marine Highway for vessel replacement, dock upgrades, vessel modernization, an electric ferry, design for a new mainliner, and to generate sustainable operations.

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

Photography credit: Bartlett Regional Hospital and City of Hoonah

Health Care Industry

3,540 Annualized Jobs in 2022

JOBS UP 32 IN 2022 WAGES UP BY 9%

2022

Southeast Alaska’s 3,540 public and private healthcare workers comprised 10% of the regional workforce in 2022, also earning 10% of all wages, \$271 million.

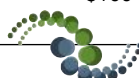
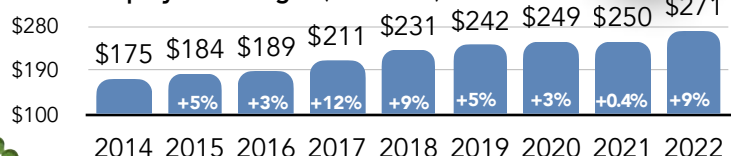
Healthcare is now the biggest economic sector in Alaska, accounting for 12% of all workforce earnings statewide, having outpaced Alaska’s historically-dominant sectors years ago. Through growth and turnover approximately 7,500 new healthcare workers must be hired across Alaska every year to keep up with staffing needs. There are too few Alaska healthcare workers to fill the current demand for services in Alaska, and job vacancies in the industry are increasing. Southeast Alaska medical facilities must compete statewide and nationally for high demand healthcare workers. In 2022, the region added just 32 healthcare jobs, despite growing demand for services. Southeast Alaska providers have repeatedly adjusted wages up to remain competitive in attracting and retaining workers, resulting in significant overall wage increases. Regional healthcare wages increased by 9% between 2021 and 2022 in an effort to compete for workers. Between 2014 and 2022, total regional healthcare wages in the region have grown by nearly \$100 million, a 55% increase.

The SouthEast Alaska Regional Health Consortium (SEARHC) is the region’s largest health care provider with staff in 27 communities, employing 40% of all regional health care workers. SEARHC has been expanding its operations, growing to 1,410 workers in 2023, with an annual revenue of \$344 million. The combined staffs of SEARHC, Bartlett, and PeaceHealth make up three-quarters of all regional health workers.

Health care jobs in Southeast Alaska have increased by 2% in the first half of 2023.

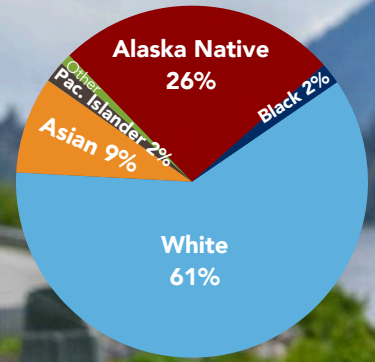
+55%
2014 to 2022

Southeast Alaska Health Care Employment Wages (in millions)



DEMOGRAPHICS

Population 72,218



POPULATION CHANGE 2021 TO 2022

Community	2022	2021	Change
Juneau Borough	32,202	32,155	0.1%
Ketchikan Borough	13,762	13,895	-1%
Sitka Borough	8,350	8,387	-0.4%
Petersburg Borough	3,357	3,368	-0.3%
Haines Borough	2,575	2,614	-1.5%
Wrangell Borough	2,084	2,096	-0.6%
Metlakatla	1,444	1,403	3%
Skagway Borough	1,146	1,203	-5%
Craig	992	969	2%
Hoonah	917	902	2%
Klawock	694	709	-2%
Yakutat Borough	673	697	-3%
Gustavus	657	658	0%
Kake	530	557	-5%
Thorne Bay	449	456	-2%
Hydaburg	347	376	-8%
Angoon	340	360	-6%
Coffman Cove	201	187	7%
Hollis	139	138	1%
Naukati Bay	131	137	-4%
Tenakee Springs	126	122	3%
Klukwan	86	88	-2%
Pelican	83	92	-10%
Whale Pass	84	84	0%
Port Alexander	57	61	-7%
Kasaan	49	46	7%
Hyder	46	42	10%
Edna Bay	42	40	5%
Port Protection	33	35	-6%
Elfin Cove	38	32	19%
Game Creek	18	19	-5%
Point Baker	10	10	0%
Remainder	556	556	0%
Total	72,218	72,494	-0.4%

2022 The region's population has remained relatively stable over the past six years, declining by less than one percent over that time, and averaging 72,500 residents.

SCHOOL ENROLLMENT

K-12 enrollment was down by 1%, as school numbers fell by 122 students in 2022. Losses were experienced across the region, but Ketchikan elementary student declines accounted for more than half of the total reduction (-67). School population in Skagway increased by 16%.

A CHANGING WORKFORCE

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 older residents, from 10% of the overall population to more than a quarter.

At the same time those of prime working age, aged 19 to 59, have shrunk by 6,500 residents. While many Southeast Alaskans work well into their senior years, this demographic shift bears a primary responsibility for the lack of available workforce within the region.

BEST SUMMER JOB MARKET

In 2023, Juneau was named the 3rd best city in the US for summer jobs (out of 180), highlighting the ample high-quality seasonal work opportunities for the region's teens and those in their 20s.

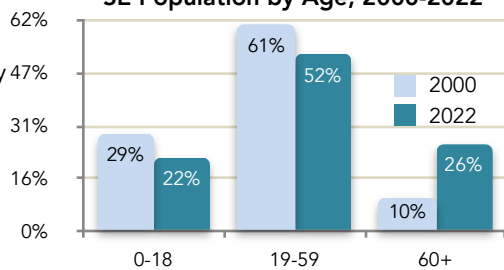
WORKFORCE RESIDENCY

In 2021, 7% of the Southeast workforce were Alaskans from other areas of the state, and 24% were non-Alaskans. Non-Alaskans earned 16% of all regional wages in 2021. Southeast's largest numbers of nonresidents work in seafood processing (66%), and accommodation and food services (38% nonresident).

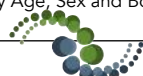
NET MIGRATION

While more people moved to Southeast Alaska than moved away in 2020 and 2021, in 2022 495 more people left the region than those who moved here. The majority of those who moved away left Alaska entirely.

SE Population by Age, 2000-2022



Sources: Alaska Department of Labor (ADOL); ADOL Southeast Alaska Population by Age, Sex and Borough/Census Area; Alaska Population Projections; US Census. WalletHub. Nonresidents Working in Alaska (ADOL). Photo: George Nickerson



Jobs by Community

Looking at all communities across Southeast in 2022, job counts were mostly up compared to 2021. Communities with large cruise ship ports were most likely to add jobs.

The largest 2021 to 2022 job gains percentage-wise included **Skagway** (+41%), **Hoonah** (+23%), and **Gustavus** (+21%). The largest increases in total wages were seen in **Skagway** (+52%), **Hoonah** (+38%), and **Gustavus** (+28%).

Five communities experienced continued job losses in 2022 compared to 2021, but only **Petersburg** lost both jobs (-12%) and wages (-16%). **Wrangell** and **Angoon** both lost 5% of all jobs.

Regional job rates remained below 2019 levels for most communities in 2022. Skagway's jobs were 19% below 2019 levels. Three communities had more jobs in 2022 than they did in 2019. These include **Gustavus** (+25%), **Yakutat** (+22%), and **Hoonah** (+11%).

Approximately half of all regional jobs (49%) and wages (52%) are in Juneau.

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.

ANNUAL EMPLOYMENT CHANGE BY COMMUNITY 2021 TO 2022

Community	2022 Annual Average Employment	2021 Annual Average Employment	2022 Wages in millions	Wages Change 2021-2022	Employment Change 2021-2022	Employment Change 2019-2022
Juneau	17,323	16,450	\$1,080.5	10%	5%	-4%
Ketchikan	6,963	6,492	\$396.2	13%	7%	-6%
Sitka	4,267	4,133	\$242.3	12%	3%	-1%
Prince of Wales	1,393	1,410	\$66.4	3%	-1%	-9%
Petersburg	1,244	1,419	\$61.1	-16%	-12%	-3%
Haines	913	813	\$40.6	19%	12%	-11%
Wrangell	673	712	\$34.9	7%	-5%	-18%
Skagway	879	623	\$45.0	52%	41%	-19%
Metlakatla	503	493	\$26.9	14%	2%	-0.3%
Hoonah SSA	476	388	\$23.1	38%	23%	11%
Yakutat	341	334	\$20.2	7%	2%	22%
Gustavus SSA	255	211	\$12.5	28%	21%	25%
Kake	161	166	\$5.8	2%	-3%	-4%
Angoon SSA	138	145	\$4.6	2%	-5%	-10%
Hyder	38	34	\$2.3	5%	13%	-26%
Klukwan	48	46	\$1.0	4%	3%	-7%

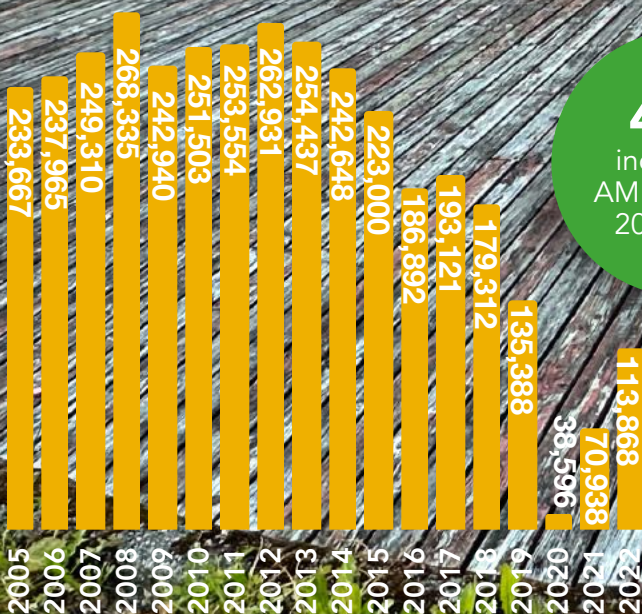
Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section.

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

SOUTHEAST ALASKA GDP 2021 = \$4.2 BILLION
Change 2020 to 2021 = 2.4%

Source: BEA

AMHS Ridership in Southeast



48%
increase in
AMHS service
2021-2022

Ferry connectivity, long identified as the most vulnerable element of the regional economy, has been cut dramatically over the past decade. However, as pandemic recovery continues, ridership was up by 48% between 2021 and 2022.

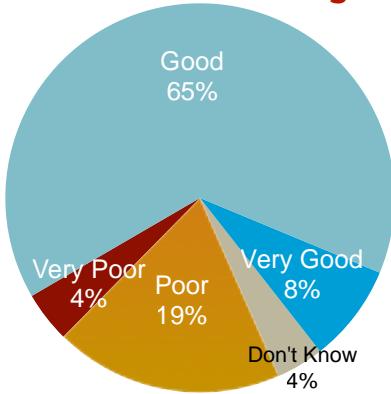
In the summer of 2023, just 6 of the State's 9 ferries were in service, but the fleet is poised for a significant makeover. Three new ferries — including one hybrid model and an electric ferry — will be added to the Alaska Marine Highway System by the end of 2027 to replace the Tustumena, Matanuska, and Lituya. In the meantime, lack of qualified crew is limiting service.

Source: AMHS. Photo from Haines Alaska.

SOUTHEAST ECONOMIC OUTLOOK SURVEY

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

73% Positive / 23% Negative



BEST BUSINESS CLIMATE SINCE SURVEY BEGAN IN 2010

In April 2023, 370 Southeast Alaska business owners and top managers responded to Southeast Conference’s Business Climate Survey.

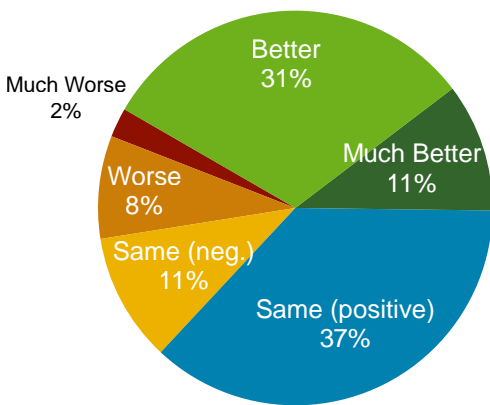
Nearly three-quarters (73%) have a positive view of the Southeast business climate, **making it the highest rated business climate since surveying began in 2010.**

While most sectors have a positive perspective on the current economy, those leading **Alaska Native organizations, tourism enterprises, and food- or beverage-focused businesses** were the most positive. Among communities, business leaders in **Sitka, Hoonah, Pelican, and Skagway** reported the most positive business perspectives.

The **seafood and transportation** (non-tourism) sectors were most likely to call the 2023 economy poor or very poor, along with business leaders in **Wrangell**.

“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 STRONG

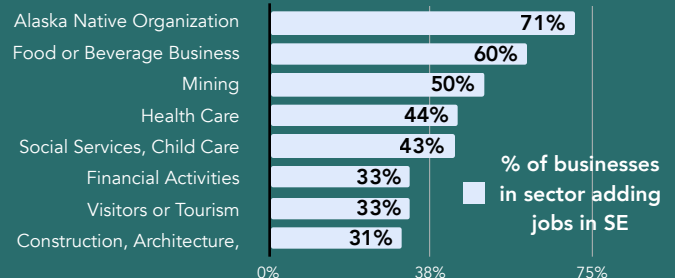
Business leaders are optimistic about the future. Almost half of respondents expect their prospects to be better (31%) or much better (11%) over the next year, with an overall positivity rating of 79%.

The economic outlook for **energy, Alaska Native organizations, tourism, and the food & beverage sector** are most positive moving into 2024, followed by the **arts**.

The communities with the most positive outlooks include **Skagway, Gustavus, Hoonah, and Sitka**.

Job Projections in Next Year

When asked about staffing expectations, 30% of regional businesses expect to add employees by spring 2024, with more than half of business leaders (56%) expecting to maintain job levels in the coming year. Just 6% of business leaders expect to reduce staffing levels. Expected job gains will be most significant in Alaska Native organizations, the food & beverage sector, mining, and health care.



Retention & Turnover: “How do these factors impact worker attraction & retention?”

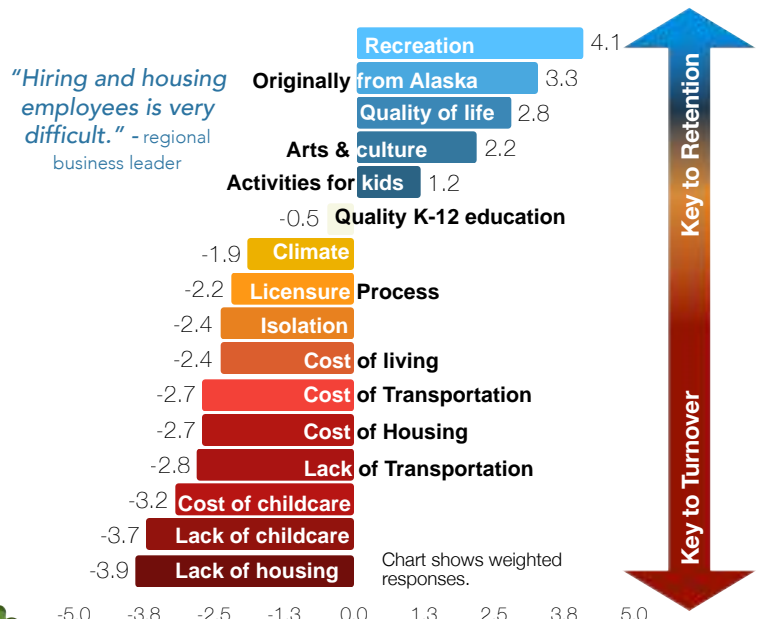
LACK OF HOUSING AND CHILDCARE ARE CREATING WORKFORCE SHORTAGES FOR REGIONAL BUSINESSES

Southeast Alaska business leaders were asked to rank the impact of various elements on workforce attraction, retention, and turnover.

More than half of business leaders (52%) say that **housing availability** results in staff leaving or not taking a job, including 36% that say it is a **significant factor**. Hoonah, Yakutat, and Sitka report the highest housing related workforce limitations.

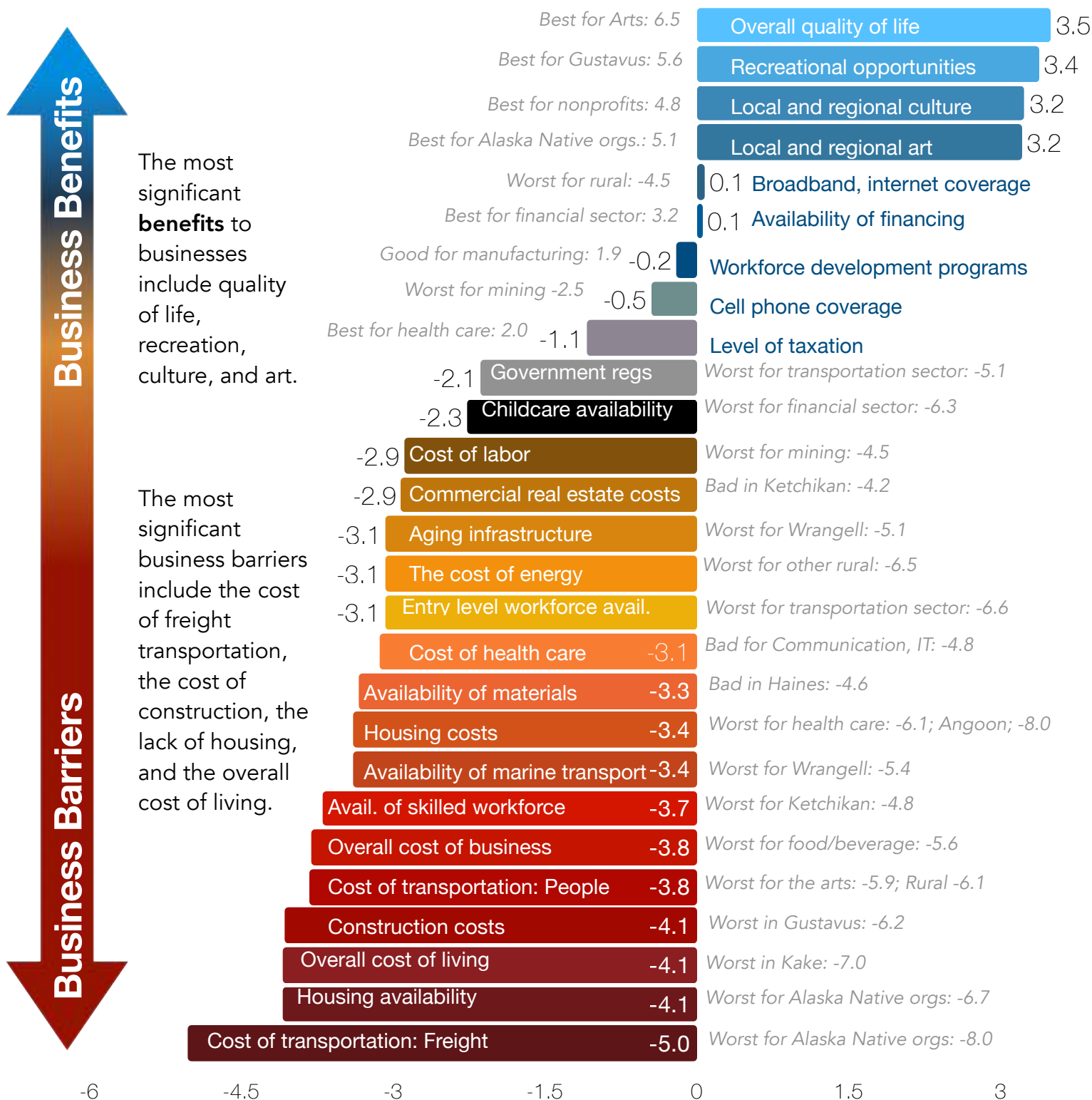
Half of business leaders say **childcare availability** is limiting their ability to keep or hire staff, including 23% that call it a significant factor. Hoonah, Prince of Wales, and Kake are most likely to call childcare a significant workforce problem.

Workers are attracted to jobs in the region — or are more likely to stay at their jobs in Southeast — because of **recreation opportunities**, because they are **originally from here**, and for the **high quality of life**, according to regional employers.



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-colored wall.

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.

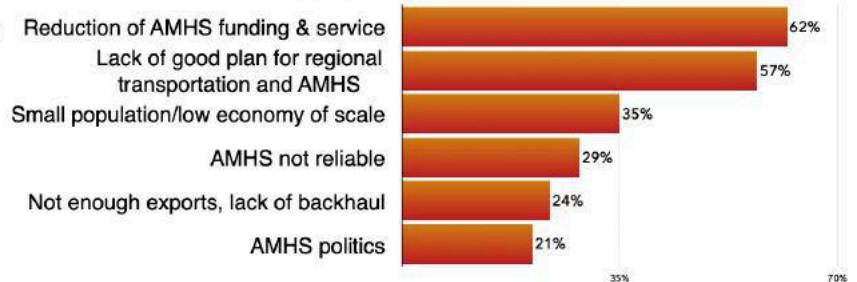
The Southeast Alaska Transportation SWOT and economic initiatives were developed and prioritized by the 46 members of the Southeast Conference Transportation Industry Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

Transportation Strengths



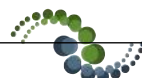
Transportation Weaknesses



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.

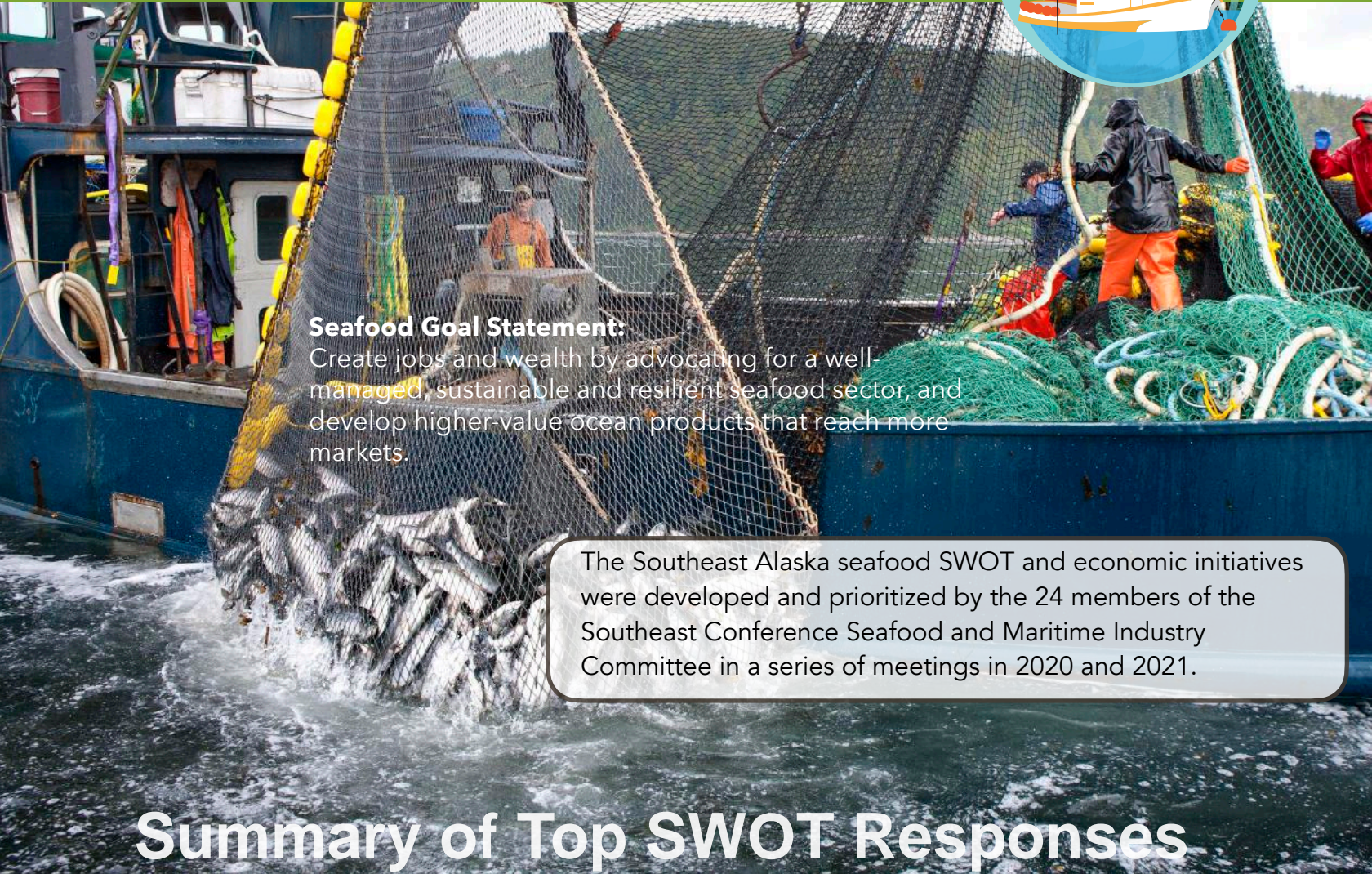
Objective #5: Ports and harbors infrastructure improvements

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.

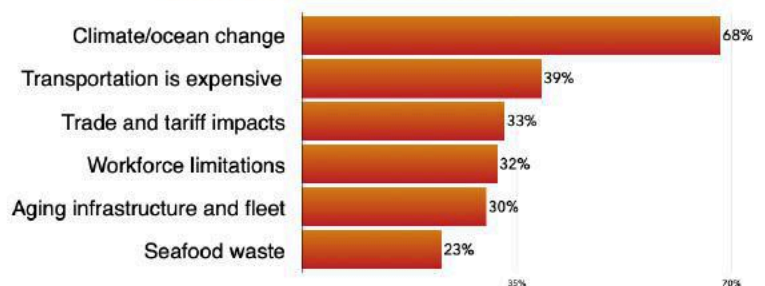
The Southeast Alaska seafood SWOT and economic initiatives were developed and prioritized by the 24 members of the Southeast Conference Seafood and Maritime Industry Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

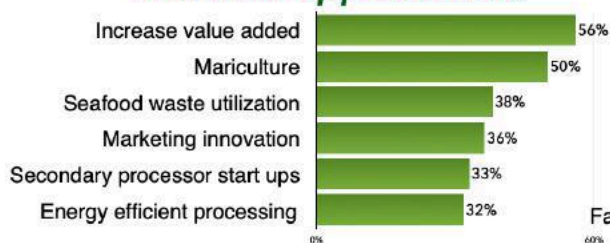
Seafood Strengths



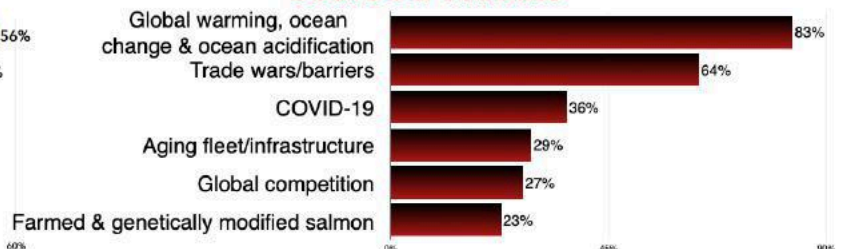
Seafood Weaknesses



Seafood Opportunities



Seafood Threats

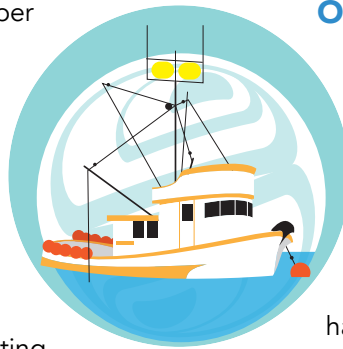


Seafood

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



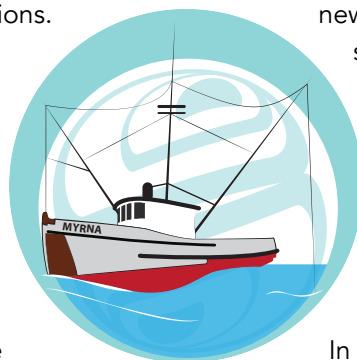
levels, as well as expanding the variety and availability of seafood products. Encourage the broadening of marketing efforts. Increase the number of firms producing high-value products. Support development of necessary infrastructure for seafood processing activities. Modernize processing plants and 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



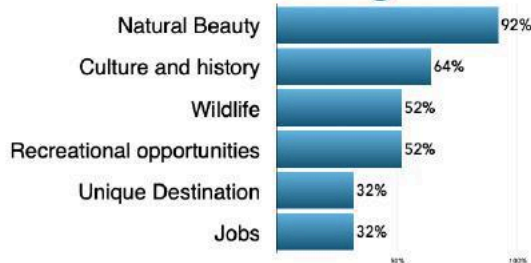
Tourism Goal Statement:

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

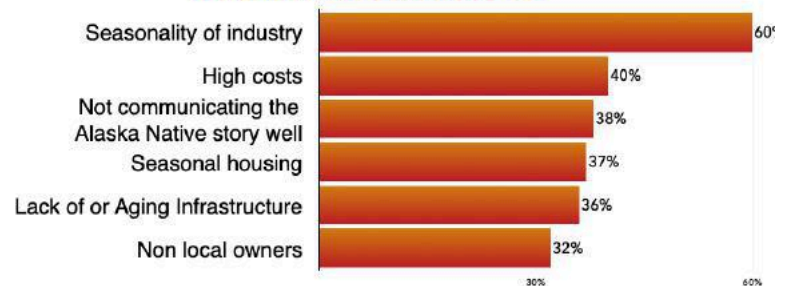
The Southeast Alaska tourism SWOT and economic initiatives were developed and prioritized by the 45 members of the Southeast Conference tourism Industry Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

Tourism Strengths



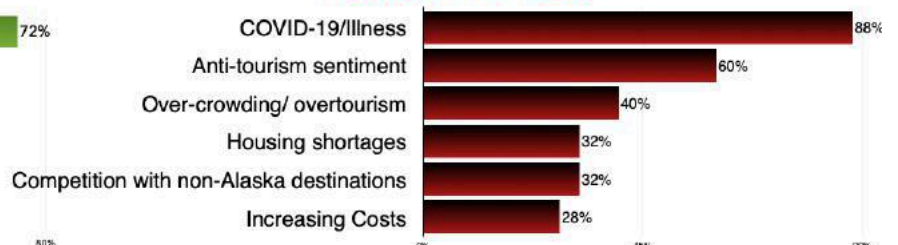
Tourism Weaknesses



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

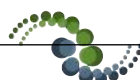
Work to change how federal land access and permitting works in Southeast Alaska. Provide more access to recreational opportunities and expand access to recreation by supporting and growing the region's non-motorized trail systems. Increase guided access to public lands by increasing the number of permits 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

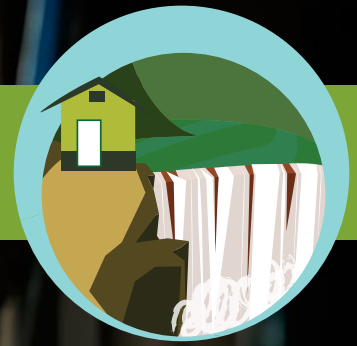
Support increased growth small cruise ship and yacht visitation in the region. Develop long-term infrastructure plans to grow and support small vessel tourism sector. Advocate for funding for visitor and transportation related infrastructure development to accommodate additional vessels and vessel related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



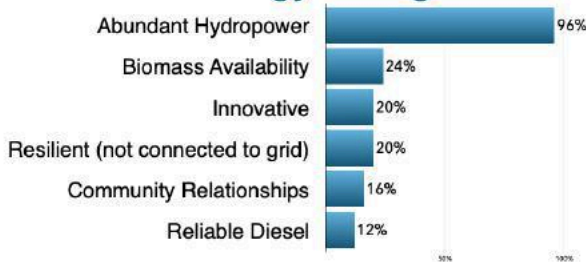
Energy Goal Statement:

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

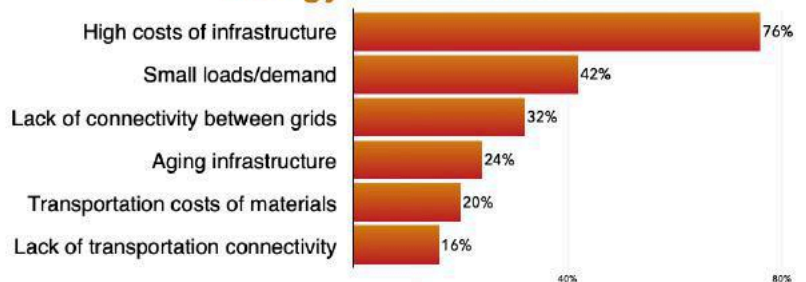
The Southeast Alaska energy SWOT and economic initiatives were developed and prioritized by the 33 members of the Southeast Conference Energy Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

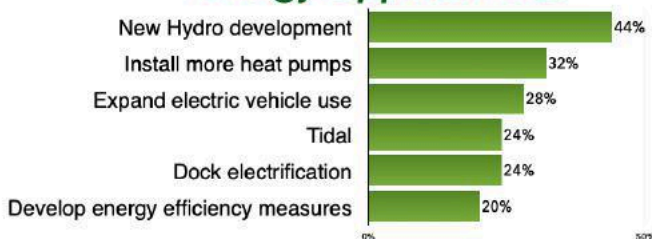
Energy Strengths



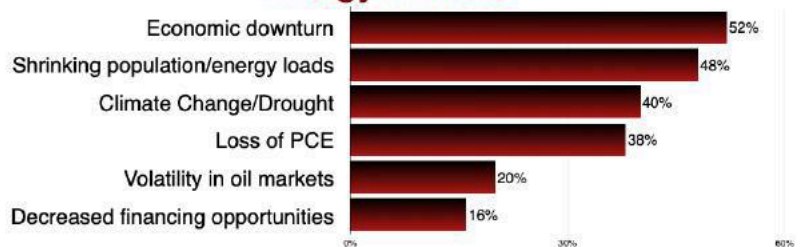
Energy Weaknesses



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.

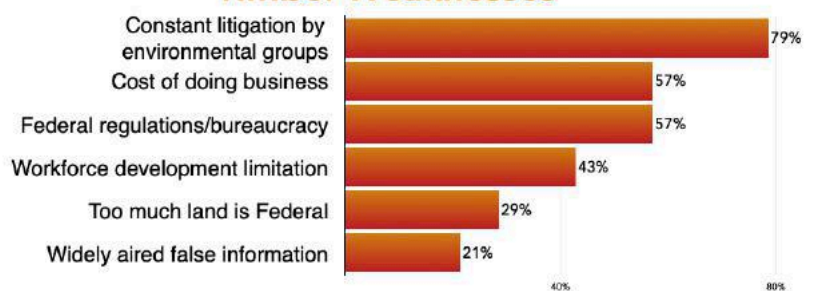
The Southeast Alaska timber SWOT and economic initiatives were developed and prioritized by the 15 members of the Southeast Conference Timber Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

Timber Strengths



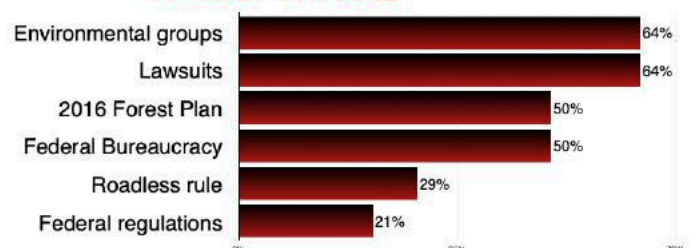
Timber Weaknesses



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



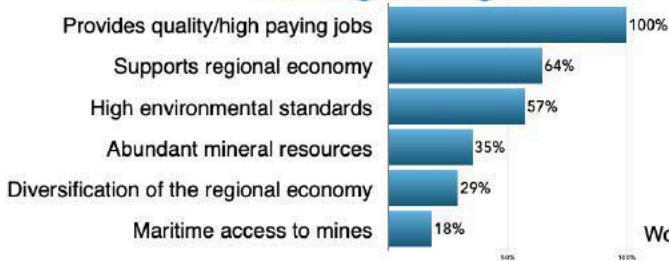
Mining Goal Statement:

Support responsible mineral development in Southeast Alaska.

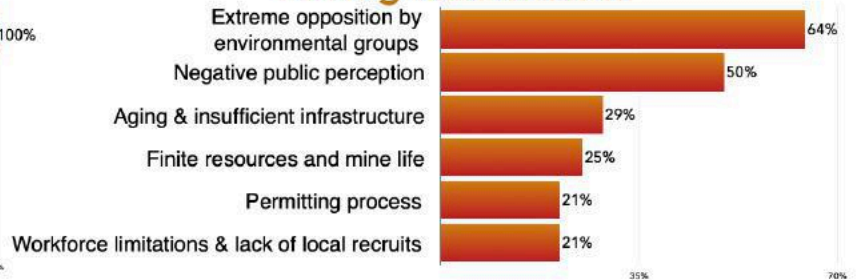
The Southeast Alaska mining SWOT and economic initiatives were developed and prioritized by the 20 members of the Southeast Conference Mining Committee in a series of meetings in 2020 and 2021.

Summary of Top SWOT Responses

Mining Strengths



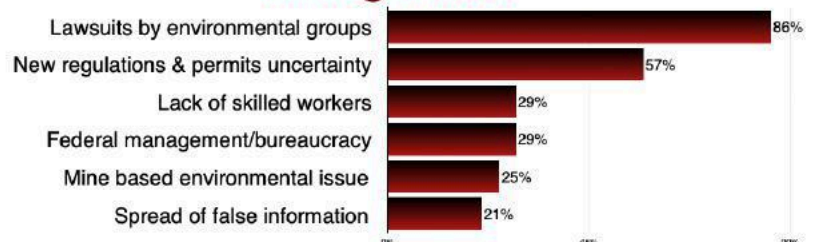
Mining Weaknesses



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

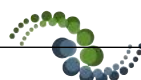
The Forest Service spends millions each year on contracts in support of construction, maintenance and land management. Help direct these contracts to local firms. Advocate for right-sizing larger projects into several smaller or linked phases. Revise federal financial bonding requirements on contracts. 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



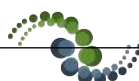
Health Care Weaknesses



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

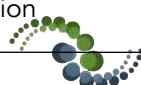
Work with State of Alaska to reduce the time it takes for physicians and nurses moving to the region from out of state to get Alaska licenses. A long process results in the loss of high-quality professionals to other states.

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.



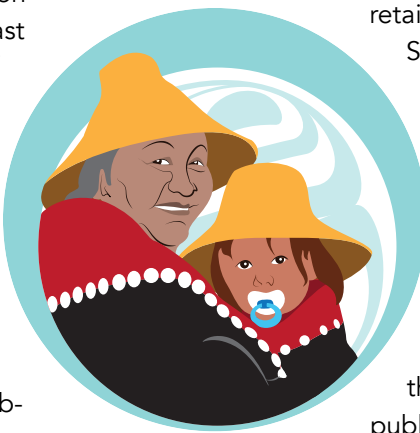


In addition to the economic initiatives that sit within the key economic sectors, there are critical additional initiatives that sit outside these focus areas. The Southeast Alaska Economic Development initiatives were developed by 30 members of the Southeast Conference Economic Development Committee 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

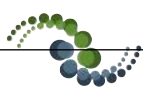
Work across the region to expand childcare capacity. Studies show that high quality early childhood education provides a significant return on investment for communities. In Southeast Alaska there is an inadequate supply of affordable, high quality preschool and childcare. Policies to solve the dual 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.

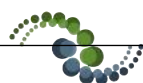
#11: Telework Objective: Promoting the Remote Workforce in Southeast Alaska

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

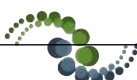
Priority Description

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

Southeast Conference Board of Directors

Mark Scheer- President. Premium Aquatics, LLC
Lisa Von Bargaen–1st Vice President. Borough Manager City & Borough of Wrangell
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

Transportation Committee

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John Falvey, AMHS, *General Manager*
Carrie Starkey, Ketchikan Chamber of Commerce
Carl Ramseth, Alaska Seaplanes, *General Manager*
Lloyd Davis, City of Kake, *City Councilman*
Shannon Adamson, Master Mates & Pilots
Hal Dryer, Kootznووoo, *President*
Melissa Kookesh, Kootznووoo, *Board Chair*
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Christa Hagen, Kawanti Adventures, *VP of Operations and Business Administration*
Lacey Simpson, City of Ketchikan, *Assistant City Manager*
Eric O'Brien, Denali Commission, *Community and Economic Development Program Manager*
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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Michelle O'Brien, Greater Ketchikan Chamber of Commerce, *Executive Director*
Representative Dan Ortiz, Alaska State Legislature, *District 36*
Joanne Schmidt, State of Alaska, *Transportation & Public Facilities Regional Planning*
KC Hostetler, Alaska Airlines, *Sales and Community Marketing Manager*
David Kensinger, Chelan Produce, *Owner*
Dave Warter, AMHS, *Port of Bellingham Terminal Manager*
Adam Anderson, AML
Ed Page, Marine Exchange of Alaska, *Executive Director*
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Shaun McFarlane, Moffitt Nichol
Nils Andreassen, Alaska Municipal League, *Executive Director*
Joycelyn Fenton, Denali Commission, *Transportation and Infrastructure Protection Program Manager*
Patrick Parsens
Diane Blumer, *Blumer & Associates*
Courtney Wendel, *STIP Planner III DOTPF, Program Development*
Doug Ward, Industrial Development Service

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John Moller, Governor's Office, *Commercial Fisheries Advisor*
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Kathy Hansen, SEAFA, *Executive Director*
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Liz Cabrera, City and Borough of Petersburg, *Community and Economic Development*
Michael Kohan, Sitka Salmon Shares, *Science and Policy Director*
Sunny Rice, Alaska Sea Grant, *Marine Advisory Agent*
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Julie Decker, AFDF, *Executive Director*
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Keith Cuddle
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Diane Doyle, Alaska DOT
Darryl Tseu, *Financial Secretary at ILWU Alaska Longshore Division*
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Taylor Asher, Alaska Energy Authority, *Project Manager*
Merrick Jackinsky, REAP, *Director of Development*
Nathan Masters, ACEP
Molly Zurks

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Chuck Bill, Bartlett Regional Hospital, *Former CEO*
Hill Pettus, Peacehealth, *VP Patient Care Administration*
Jennifer Motes, UAA, *Senior Development Officer, College*

of Health

Amelia Budd, SERRC, Area Health Education Center
Director

Gloria Burnett, UAA, Alaska's Area Health Education
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Tanguy Libbrecht, American Red Cross in Alaska, *CEO*

Richard Harney, Ketchikan Gateway Borough, *Planning
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Tracy Harmon, Haines Chamber of Commerce, *Executive
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Dave Kensinger, Chelan Produce, *Owner*

Corey Baggen, Samson Tug and Barge, *Vice President*

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Scott Ciambor, CBJ, Housing Program, *Chief Housing
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Representative Andi Story, Alaska State Legislature

Will Ware, Central Council Tlingit & Haida Tribes of Alaska

Jan Bush, Prince of Wales Chamber of Commerce,
Director

Wendy Hamilton, Prince of Wales Chamber of
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Stephanie Cook, Wrangell Chamber of Commerce

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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Michael Harmon, City of Sitka, *Public Works Director*

Harry Green, City of Sitka, *M & O Superintendent*

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

Jon Bolling, City of Craig, *City Administrator*

Craig Franke, Community Waste Solutions, *General
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Melissa Aronson, Haines, AK

Carol Fletcher, Organized Village of Kasaan, *Project
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Dennis Nickerson, Environmental Planner, Prince of
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Chris Hatton, Wrangell, AK

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Chris Cotta, Petersburg Borough, *Director of Public Works*

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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

