

Southeast Alaska 2030 Economic Plan

Southeast Conference's Comprehensive
Economic Development Strategy
2025-2030

DRAFT

Tlingit & Haida



SOUTHEAST
CONFERENCE

Updated February 7, 2025



Prepared by
Rain Coast Data



SOUTHEAST 2030 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:

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 and Workforce Planning overview - **page 17-18**

Strategic Direction Action Plan incorporating tactics identified through planning process, other plans, and stakeholder feedback to develop the priority strategies for the region - **pages 21-34;**

Strategic Direction Action Plan, Part II - Priority Objective Descriptions and Evaluation Framework to identify and monitor performance measures associated with the plan - **pages 35-47**

Economic Plan Steering Committee roster of names - **page 48-49**

Appendices page 50

The CEDS process began in March 2024 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 draft plan was released on February 11, 2025.

Southeast Alaska Comprehensive Economic Development Strategy Meeting Schedule 30+ Meetings, 400+ Stakeholders

	Transportation	Energy	Nat Resources	Seafood	Tourism	Other CEDS
Winter 2024	●	●	●	●	●	●
Spring 2024	●	●	●	●	●	●
Summer 2024	●	●	●	●	●	●
Fall 2024	●	●	●	●	●	●
Winter 2025	●	●	●	●	●	●

SOUTHEAST 2030 STRATEGIC PLAN SUMMARY

In February 2025, Southeast Conference released the draft Southeast Alaska 2030 Economic Plan, a five-year strategic plan for the region. The membership worked together to develop an overall vision statement, 46 objectives, and 7 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.

ECONOMIC DEVELOPMENT

- ★ 1. **Housing objective: Support the sustainable development of housing**
- ★ 2. **Childcare objective: Increase childcare capacity in Southeast Alaska**
- 3. **Infrastructure maintenance**
- 4. **Education objective:** Partner with University of Alaska Southeast and K-12 school districts to build career pathways
- 5. **Workforce attraction and retention objective**
- 6. **Coast Guard Objective:** Support Coast Guard vessel homeporting opportunities
- 7. **Natural disaster planning objective:** Support disaster preparation and relief efforts
- 8. **Solid waste objective:** Support regional solid waste management solutions
- 9. **Healthcare workforce objective**
- 10. **Telecommunications objective:** Improve communications access in Southeast Alaska
- 11. **Manufacturing objective:** Promote regionally-manufactured local products
- 12. **Food security objective:** Increase supply and distribution of local foods



SEAFOOD

- ★ 1. **Further develop markets for Alaska seafood**
- ★ 2. **Seafood modernization initiative**
- 3. Work to further promote a year-round seafood economy in the region
- 4. Full resource utilization and ocean product development
- 5. Mariculture development
- 6. Bring back seafood jobs to Southeast's smallest communities
- 7. Support access to capital for harvesters and processors
- 8. Maintain a stable regulatory regime



NATURAL RESOURCES

- 1. Prepare for potential Chinook salmon listings
- 2. Work with USFS to direct federal contracts toward locally-owned businesses
- 3. Support an innovative, integrated timber industry
- 4. Attract capital investments, maintain global competitiveness
- 5. Provide an economically viable supply of timber from the Tongass to regional operators
- 6. Increase access to minerals and energy sources for mining on state and federal lands
- 7. Advocate for the regulators
- 8. Revise the Tongass National Forest Land Management Plan



VISITOR INDUSTRY

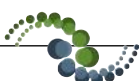
- ★ 1. **Support local tourism ownership and entrepreneurship**
- 2. Workforce housing for visitor's sector
- 3. Cultural tourism development
- 4. Collective regional strategy for accommodating tourism industry growth in Southeast



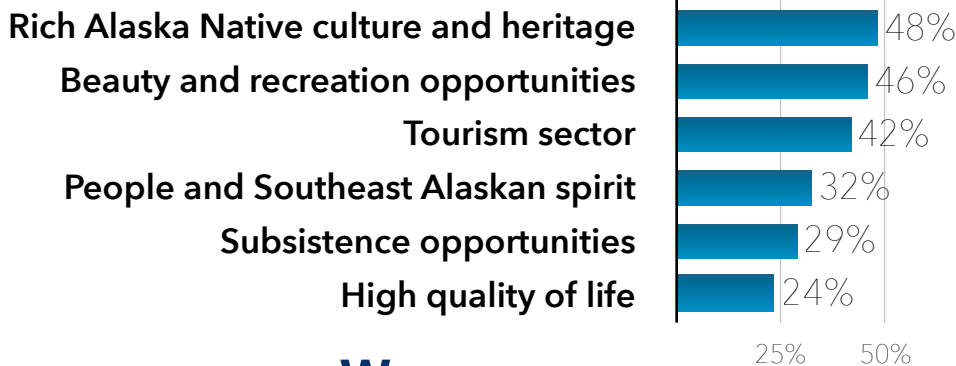
ENERGY SECTOR

- ★ 1. **Reduce energy costs and increase deployment of renewables**
- 2. Promote beneficial electrification
- 3. Support consumer education on heat pumps
- 4. Policy and regulatory development to meet community energy needs and priorities
- 5. Continue to support PCE for rural communities
- 6. Biomass in energy

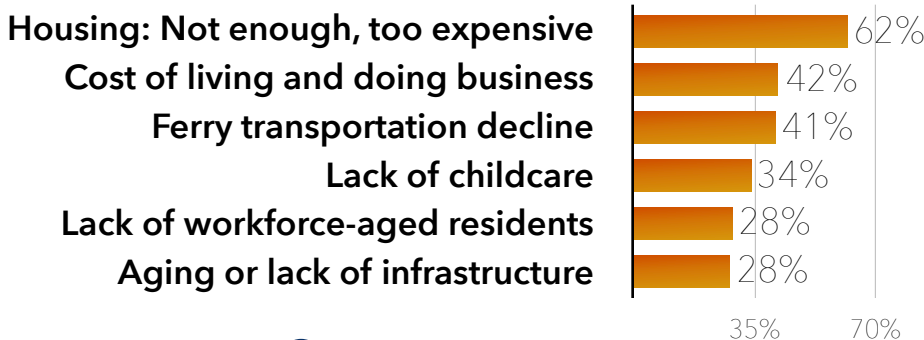
★ = Priority Objectives



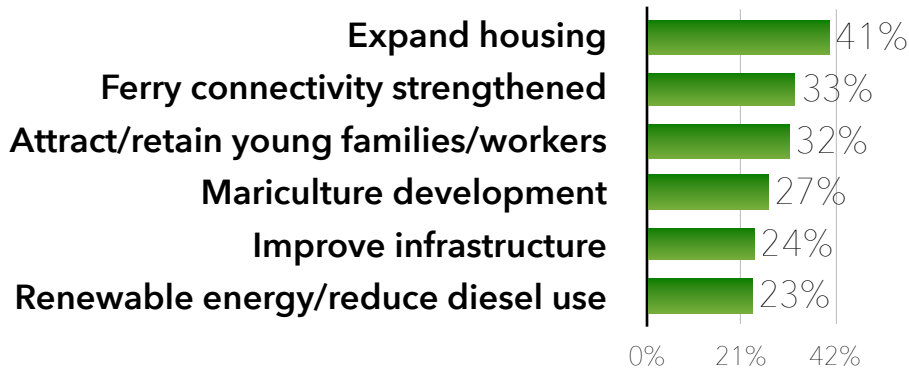
STRENGTHS



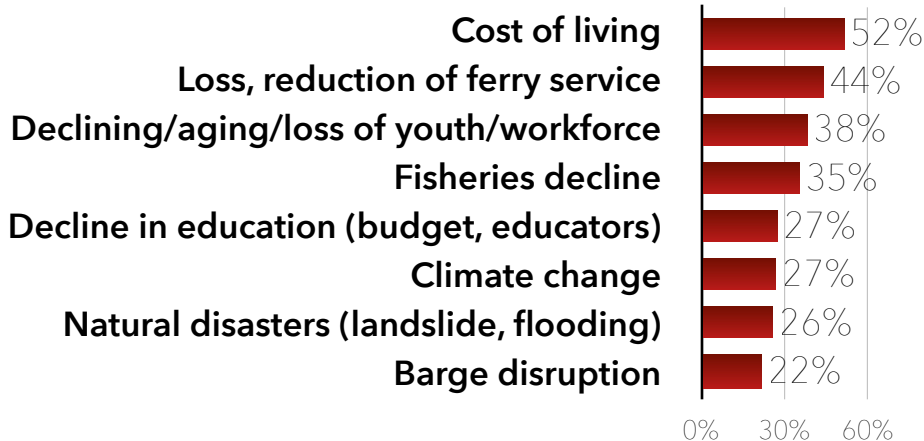
WEAKNESSES



OPPORTUNITIES



THREATS



2030 ECONOMIC PLAN DEVELOPMENT

Approximately 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: **High costs**
- Top Opportunity: **Increase value-added processing**
- Top Threat: **Low seafood prices**

Visitor Industry

- Top Strength: **Natural beauty of region**
- Top Weakness: **Limited seasonal housing**
- Top Opportunity: **Workforce housing development**
- Top Threat: **Housing shortages**

Transportation

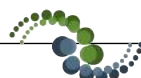
- Top Strength: **Connecting communities**
- Top Weakness: **Lack of qualified workforce**
- Top Opportunity: **Improve ferry service**
- Top Threat: **Demise of AMHS**

Energy

- Top Strength: **Abundant hydropower**
- Top Weakness: **High costs of infrastructure**
- Top Opportunity: **Heat pump installation**
- Top Threat: **Inadequate workforce**

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: **Anti-mine advocacy**



SOUTHEAST ALASKA

Summary Background 2024



Photo by Rafe Hanson Photography

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

CHANGES 2022 TO 2023

SOUTHEAST ALASKA'S ECONOMY



THE **LABOR FORCE**
INCREASED BY **1,428**
JOBS TO **45,883 +3%**



TOTAL WAGES
INCREASED BY **\$120**
MILLION TO \$2.76
BILLION, **+5%**



TOURISM JOBS
INCREASED BY **26%**,
WAGES INCREASED BY
44%, +\$105 MILLION



VALUE OF SEAFOOD
LANDED IN THE REGION
DECREASED BY **20%**,
-\$66 MILLION
CATCH WAS UP BY **74**
MILLION POUNDS



REGIONAL **POPULATION**
DECREASED BY **796**
PEOPLE TO 71,077



HEALTHCARE JOBS
INCREASED BY **88**,
WAGES INCREASED BY
\$24 MILLION

2023 Southeast Alaska's economy is growing. In 2023, jobs were up by 3% and wages were up by 5% over 2022. All but two communities gained workers as 1,400 new jobs were added across the region. However, the region's two top private sector industries, seafood and tourism, experienced very different outcomes.

In 2023, tourism became the largest sector in the region, with a lot more jobs, and more wages than any other sector, including local or state government. Tourism jobs flooded back, growing by 26%, an increase of 1,700 year-round-equivalent jobs. Workers earned \$105 million more than the year before, a 44% increase.

Seafood was the top private sector industry in 2022 and brought in a massive harvest in 2023. But while the catch was the largest in more than a decade, it had one of the lowest catch values on record, \$66 million less than the smaller catch from the year before. Wages fell by 26%, as global markets drove down prices.

Other sectors were mostly up. The government, healthcare, retail, construction, finance, and mining sectors all added workers to their payrolls. Tribal government grew by 9%. Regional GDP was up by 31%. Nine communities saw double digit wage growth. But not all indicators were up. State jobs continued to decline, social services were down, along with professional & business services. Population and school enrollment declined.

2024 The economy of 2024 is strong and diversified. Two-thirds of Southeast business leaders are optimistic looking forward, with 30% saying their prospects will be even better over the next year. The regional economy has fully recovered from the pandemic.

Tourism is having another strong year as 1.67 million cruise passengers are expected to visit. The construction industry is responding to \$334 million in infrastructure bill investments in Southeast. Inflation has normalized. Wages are on the rise.

Seafood continues to be a concern. While prices are up slightly from 2023 levels, the catch is down significantly, although the season is ongoing.

While jobs continue to grow in 2024, so do concerns about the lack of a sufficient workforce in the region. Compared to 2010, when the population was nearly identically sized, the region now has 1,700 more jobs and 5,600 fewer workforce-aged residents. In 2024, regional business leaders were asked where the focus needs to be over the next five years. The top two answer were clear:

1. Housing initiatives, and
2. Attracting and retaining a workforce-aged population.

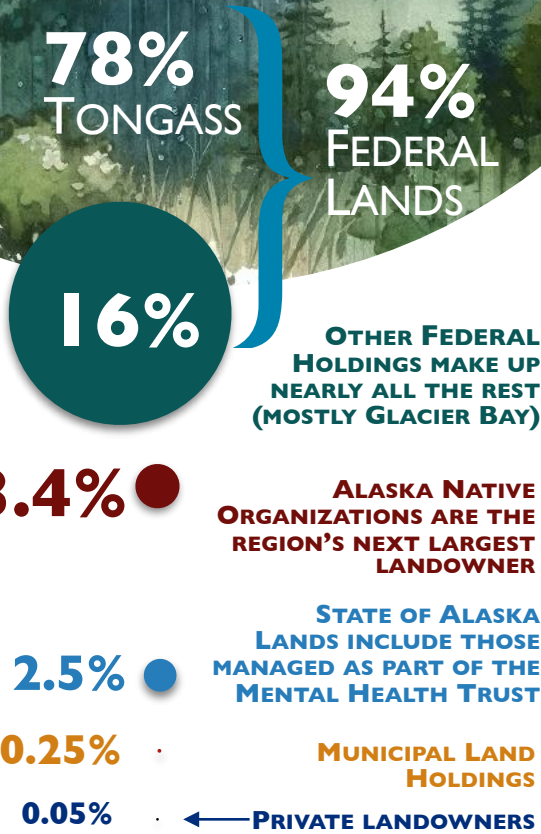
We need more young people in the region, and in order to attract them, we need more housing and more affordably-priced homes.

SOUTHEAST ALASKA REGIONAL OVERVIEW

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

Southeast Alaska Land Ownership

Circle size = Number of Acres



THE REGION

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

CULTURE

The dominant culture in the region is indigenous. Alaska Natives – the Tlingit, Haida, and Tsimshian – make up more than a quarter (26%) of the region’s population. 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 a quarter of all State of Alaska jobs in the region 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. By 2024 the jobs, tourists, fish, and wages were back, but low seafood prices, and a declining workforce, are creating new economic challenges.

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: Mike Dangeli and Mike Russ Photography

The Whole Southeast Alaska Economy 2023

In 2023, Southeast Alaska gained more than 1,400 year-round equivalent jobs and \$120 million in workforce earnings compared to 2022.

Annual Average Jobs

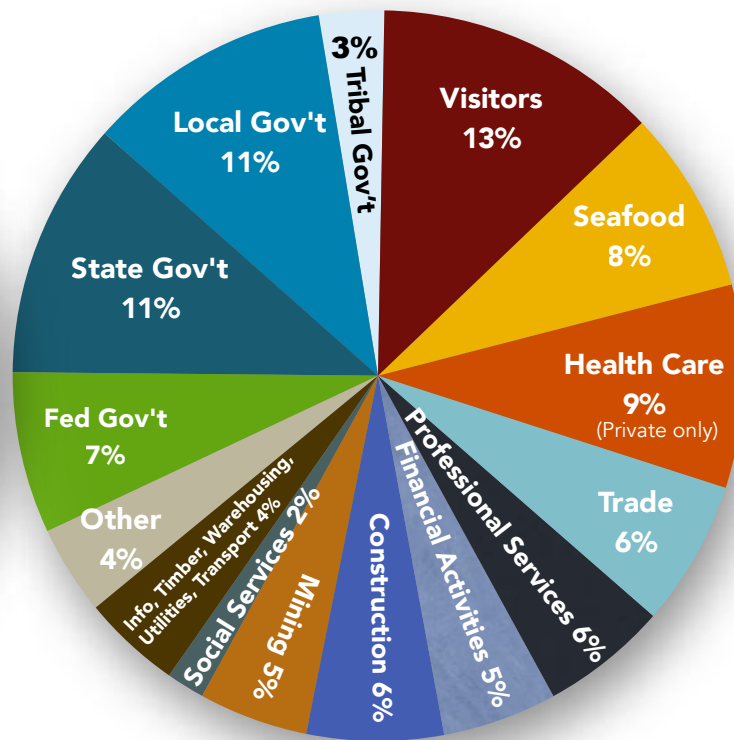
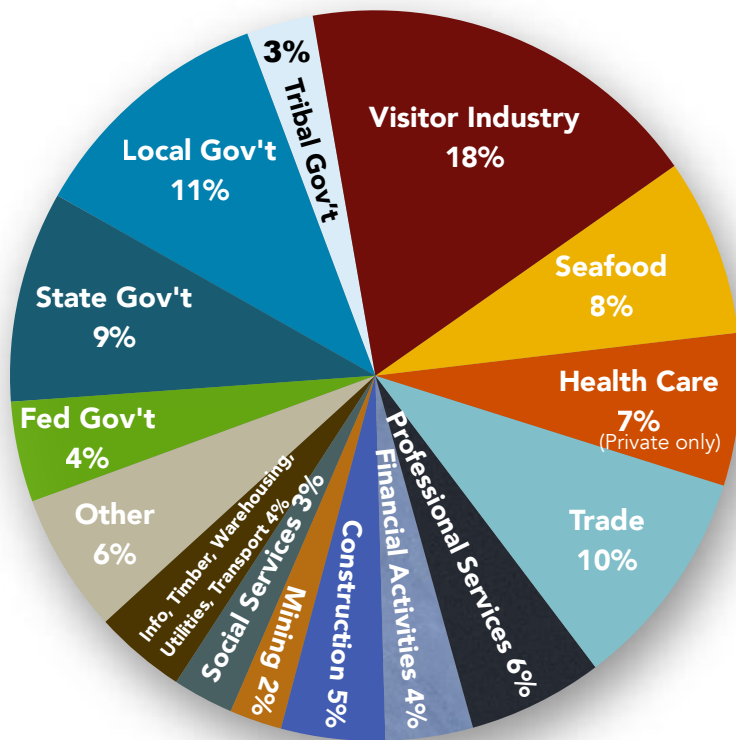
45,883 Jobs

UP 1,428 JOBS IN 2023 +3%

Employment Earnings

\$2.76 Billion Workforce Earnings

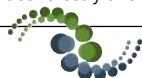
UP \$120 MILLION +5%



2023 Southeast Alaska Employment Earnings

	EMPLOYMENT RELATED EARNINGS			EMPLOYMENT NUMBERS			
	Wages (2023)	Self-Employment Earnings (est.)	Total Earnings	Annual Average Employment (2023)	Self-Employed (est.)	Total Employment	Change 2022 to 2023
Government (includes Coast Guard)	\$832,280,274	\$60,120,000	\$892,400,274	12,110	668	12,778	134
Visitor Industry	\$308,869,594	\$38,487,214	\$347,356,808	7,212	1,050	8,263	1,694
Seafood Industry	\$104,743,179	\$120,094,157	\$224,837,336	1,453	2,151	3,604	-49
Trade: Retail and Wholesale	\$152,775,223	\$25,737,565	\$178,512,788	3,950	566	4,515	261
Health Care Industry (private only)	\$231,396,548	\$17,181,417	\$248,577,965	2,815	279	3,095	72
Construction Industry	\$119,487,289	\$47,894,644	\$167,381,933	1,479	632	2,110	72
Financial Activities	\$61,963,111	\$78,305,008	\$140,268,119	1,015	761	1,776	30
Professional and Business Services	\$101,092,563	\$53,776,335	\$154,868,898	1,526	1,220	2,746	-191
Mining Industry	\$133,345,932	\$462,762	\$133,808,694	1,054	7	1,061	59
Social Services	\$42,641,296	\$4,188,024	\$46,829,320	1,049	190	1,238	-27
Information	\$16,259,923	\$1,025,356	\$17,285,279	325	47	372	-107
Timber Industry	\$16,939,861	\$2,301,703	\$19,241,564	239	52	291	-4
Warehousing, Utilities & Non-Visitor Transportation	\$71,535,757	\$12,717,397	\$84,253,154	955	245	1,200	-768
Other	\$70,534,248	\$38,567,492	\$109,101,740	1,734	1,099	2,833	251
Total	\$2,263,864,798	\$500,859,075	\$2,764,723,873	36,914	8,968	45,883	1,428

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.



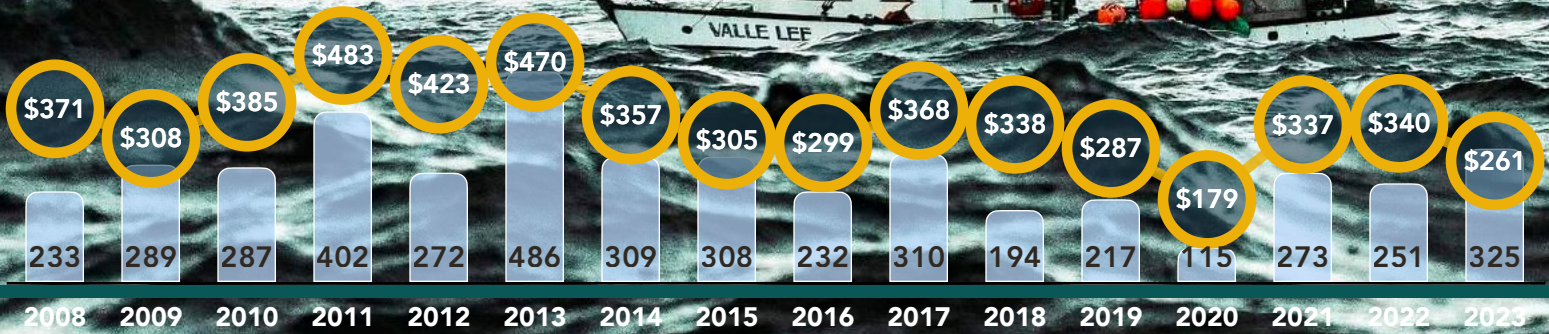
CHANGE IN THE LAST YEAR: 2022 to 2023

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

DEMOGRAPHICS	2022	2023	% CHANGE 2022-2023	CHANGE 2022-2023
Total Population ¹	71,873	71,077	-1%	-796
Under Age 15 ²	12,422	11,993	-3%	-429
Twenty-somethings ²	7,824	8,038	3%	214
Ages 65 and older ²	13,462	13,698	2%	236
UAS Enrollment (fall enrollment)	2,148	2,177	1%	29
K-12 School District Enrollment ³	10,803	10,697	-1%	-106
GENERAL ECONOMIC CONDITIONS				
Total Labor Force (jobs, includes self-employed & USCG) ^{1,5,6}	44,455	45,883	3%	1,428
Total Job Earnings ^{1,5,6}	\$2.64 billion	\$2.76 billion	5%	\$120 million
Total Private Sector Payroll ^{1,6}	\$1.8 billion	\$1.97 billion	9%	\$166.7 million
Average Annual Wage ¹	\$59,493	\$60,257	1%	\$763
Annual Unemployment Rate ¹	3.6%	3.9%	0.3%	0.3%
TOP ECONOMIC SECTORS				
GOVERNMENT				
PUBLIC SECTOR: 32% OF ALL EMPLOYMENT EARNINGS				
Total Government Employment ^{1,5}	12,644	12,778	1%	134
Federal Employment ^{1,5} (8% of all employment earnings)	2,019	2,044	1%	25
State Employment ¹ (14% of all job earnings)	4,334	4,287	-1%	-47
City and Tribal Employment ¹ (14% of all job earnings)	6,291	6,446	2%	155
Total Government Payroll (includes USCG) ^{1,5}	\$842.7 million	\$892.4 million	6%	\$49.7 million
State of Alaska Payroll ¹	\$289.1 million	\$315 million	9%	\$25.9 million
VISITOR INDUSTRY				
KEY INDUSTRY: 13% OF ALL EMPLOYMENT EARNINGS				
Total Visitor Industry Employment ^{1,6}	6,569	8,263	26%	1,694
Total Visitor Industry Wages/Earnings ^{1,6}	\$241.9 million	\$347.4 million	44%	\$105.5 million
Total Southeast Alaska Passenger Arrivals	1,652,223	2,145,049	30%	492,826
Cruise Passengers ¹⁰	1,178,123	1,670,000	42%	491,877
Total Air Passenger Arrivals from Outside SE ¹¹	465,299	467,738	1%	2,439
Total AMHS Passengers from Outside SE ¹²	8,801	7,311	-17%	-1,490
COMMERCIAL FISHING & SEAFOOD INDUSTRY				
KEY INDUSTRY: 8% OF ALL EMPLOYMENT EARNINGS				
Total Seafood Employment (includes fishermen) ^{1,6}	3,653	3,604	-1%	-49
Total Seafood Employment Earnings ^{1,6}	\$301.8 million	\$224.8 million	-26%	-\$77 million
Commercial Fishing Boats Homeported in SE ¹⁵	2,647	2,661	1%	14
Value of Seafood Processed ⁷	\$765.7 million	\$508.2 million	-34%	-\$257.5 million
Pounds (whole seafood landed pounds by SE residents) ⁸	251.4 million	325.2 million	29%	73.7 million
Estimated Gross Earnings (ex-vessel value of pounds landed) ⁸	\$326.8 million	\$260.7 million	-20%	-\$66.1 million
HEALTH CARE INDUSTRY (PUBLIC & PRIVATE HEALTH)				
KEY INDUSTRY: 11% OF ALL EMPLOYMENT EARNINGS				
Health Care Employment ^{1,6}	3,811	3,899	2%	88
Health Care Wages ^{1,6}	\$287.2 million	\$311.5 million	8.5%	\$24.4 million
MARITIME ECONOMY (Includes employment from all industries)				
KEY INDUSTRY: 14% OF ALL EMPLOYMENT EARNINGS				
Private Maritime plus USCG Employment ^{1,5,6}	5,558	5,567	0%	9
Private Maritime plus USCG Wages ^{1,5,6}	\$482.2 million	\$380.2 million	-21%	-\$102 million
OTHER SELECTED STATISTICS				
2022				
2023				
% CHANGE				
CHANGE				
Construction Employment ^{1,6} (6% of all employment earnings)	2,038	2,110	4%	72
Mining Employment ¹ (5% of all employment earnings)	1,002	1,061	6%	59
Price of Gold ⁷	\$1,802	\$1,928	7%	126
Total Southeast AMHS Ridership ¹²	113,868	127,461	12%	13,593
Cost of Living: Consumer Price Index ¹	256.4	260.4	2%	4
Housing Units Permitted/Completed ^{4,1}	169	258	53%	89
Avg. Daily Volume ANS Oil Production (mbbls/day) ¹⁴	485,193	468,445	-3%	-16,748
Annual Avg. Domestic Crude WTI Oil Prices (in \$/Barrel) ¹⁴	\$100	\$83	-17%	-17

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 (RITA); ¹¹Alaska Marine Highway System data; ¹²Alaska Department of Revenue Crude Oil and Natural Gas Prices; ¹³Commercial Fisheries Entry Commission.

○ Inflation Adjusted Value to Fishermen (millions)
■ Landed Whole Pounds (millions)



Seafood Industry 3,604 Annualized Jobs 2023

**EARNINGS DOWN
\$77 MILLION IN 2023**

2023 While seafood was the top private sector wage provider in the region in 2021 and 2022, the value of seafood dropped precipitously in 2023, but not for lack of fish.

supply, leading to depressed prices across all species. Overall jobs were basically flat, down by 1%, so workers simply earned a lot less than they had in 2022, after working more.

In 2023, the five salmon species represented 82% of the regional seafood catch by pounds landed, and slightly more than half the overall value (54%). Halibut, black cod, crab, and the dive fisheries accounted for just 10% of pounds landed, but 41% 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 3,604 annual regional jobs and \$225 million in earnings in 2023, making up

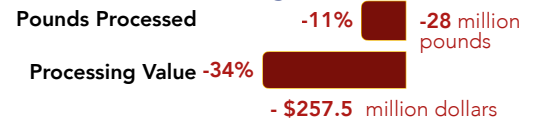
8% of earnings and jobs in the region.

The 10-year Southeast seafood harvest averages are 253 million whole pounds, and an inflation-adjusted value of \$307 million.

SEAFOOD PROCESSING

Seafood processing values were also down significantly. In 2023, shore-based seafood facilities in Southeast Alaska processed 229 million pounds of seafood in the region, with a wholesale value of \$508 million, including shorebased processors and direct marketers. This represents a 34% decrease in value over 2022 as 28 million fewer pounds of seafood were processed.

SE Seafood Processing: 2022 vs. 2023



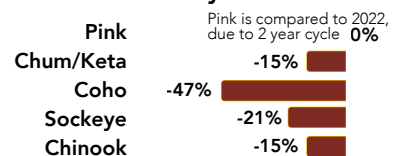
In 2023, regional fishermen caught 325 million pounds of seafood (measured in whole pounds), the largest catch since 2013. Yet it was one of the lowest catch values on record with a value of \$261 million. Only 2020 was lower in recent history. The overall gross value of the catch was down 20%, a \$66 million decrease over 2022. Total earnings across the seafood sector dropped by \$77 million.

The overall harvest was huge. Fishermen caught 74 million more pounds of seafood in 2023 than they did in 2022. This includes 78 million more pounds of pink salmon — due to it being an odd year — and 27 million more pounds of chum. But the per pound value of species were down considerably. The pandemic and the Russia-Ukraine war contributed to an over-abundant global salmon

THE 2023 SOUTHEAST CATCH COMPARED TO THE 2022 CATCH IN MILLIONS				
Species	2023 Pounds Landed	2022 Pounds Landed	2023 Catch Value	22-23 Change in Value
Pink Salmon	146.5	68.3	\$40.0	10%
Chum Salmon	102.3	74.9	\$68.3	-30%
Herring	22.6	51.8	\$11.0	28%
Black Cod	15.6	17.1	\$39.6	-28%
Coho Salmon	10.4	9.3	\$12.2	-15%
Halibut	8.0	8.9	\$38.3	-30%
Sockeye Salmon	5.3	6.9	\$6.5	-54%
Chinook	2.5	3.4	\$14.0	-22%
Geoduck, Sea Cucumbers, Urchins	2.2	2.0	\$13.6	52%
Crab	5.2	4.2	\$14.4	-24%
All Other	4.7	4.8	\$3.0	-2%
Pounds	325 million	251 million	\$261 million	-\$66 million

2024 The 2024 harvest-to-date is down, and fish prices remain low. Southeast has seen a solid pink salmon return, in contrast with the rest of Alaska, which has been reporting abysmal pink harvests. ASMI's September 2024 update is below:

SE Salmon Catch: 2023 vs. 2024 Year over year: week 36



2024 continues to be a challenge for regional fishermen and processors, although prices appear to be up slightly from 2023's deflated levels.

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.**



Visitor Industry

8,263 Annualized Jobs
\$347 Million in Wages in 2023

UP 1,694 JOBS IN 2023
EARNINGS UP BY 44% +\$106M

2023 Nearly 2.2 million passengers arrived in Southeast Alaska by air, ferry, and cruise ship in 2023.

RECORD BREAKING CRUISE SHIP SEASON

Cruise passenger numbers grew by a nearly half million passengers, a 42% increase from 2022, as the pandemic's impact on tourism was finally erased. The 2023 season's 1.67 million cruise ship passengers marked a new regional record, breaking the previous record of 1.33 million cruise passengers set in 2019. Airline passengers increased by more than 2,400. Although total ferry passenger traffic arriving from outside the region was down by about 1,500 passengers due to scaled back marketing.

In 2023, visitor sector jobs increased by 26% over 2022, as nearly 1,700 new year round equivalent jobs were added, and wages grew by \$105.5 million, a 44% increase. Those working in the visitor industry earned \$347 million in 2023, comprising 13% of all regional employment income, making tourism the top economic sector in the region.

2024 BUSINESS LEADERS SURVEY
By all accounts 2024

has been a very good year for tourism businesses, and by extension, the regional economy. In spring 2024, business leaders from the tourism, food, and beverage sectors reported a strong economic climate with 81% calling the business climate good or very good for their business. Nearly half (43%) expected their business operations to be even stronger headed into 2024 and 2025.

SIMILAR-SIZED CRUISE SEASON IN 2024

After 3 years of cruise passenger number volatility, 2024 offers a stable supply of cruise passengers. The City and Borough of Juneau (CBJ) is working with the cruise industry on passenger abatement strategies to ensure a holding pattern on growth. In 2024, ships are expected to carry 1.7 million passengers by the end of this summer.

Tourism businesses are reporting record revenues, and are becoming competitive with other sectors for workers, as visitor sector wages increase. Between 2022 and 2023, the average tourism wage increased 14%.

"Sales are definitely up, but so are expenses."
Tourism business leader in August 2024

WORKFORCE AND HOUSING CHALLENGES

With the most visitor sector jobs the region has ever had, attracting a workforce sufficient to serve visitors has remained a challenge for regional businesses, and business leaders place the primary blame on housing. In a visitor industry SWOT, leaders say the top tourism weakness in the region is limited housing, the top opportunity is workforce housing development, and the top threat is a shortage of housing.

JET PASSENGERS

Total air passenger arriving from outside Southeast was up by 1% in 2023 to just under a half million. In the first half of 2024 total air passenger arrivals for the region was 2% above 2023 levels.

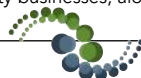
2025 VISITOR STABILITY EXPECTED IN 2025/2026

Moving into 2025, regional cruise ship passenger numbers are expected to be slightly smaller than the 2024 seasons. This is due to three significant agreements between local communities and the larger cruise industry:

- 1) 5-Ship Limit:** In 2024, the CBJ started enforcing a 5-ship-per-day limit, a recommendation of the community's Visitor Industry Task Force, and agreed to by the industry.
- 2) Daily Caps:** CBJ worked with the cruise lines to set a daily agreed upon limit of 16,000 on weekdays and 12,000 on weekends, which will be enacted in 2026.
- 3) Shorter Season:** Also in 2026, the cruise season will be significantly shorter. Instead of starting in early April, the 2026 cruise season is currently slated to begin on April 28, and instead of running through the end of October, the season will end on October 6.

These three changes are intended to cap significant overall cruise passenger growth and includes an agreement to meet annually to balance the schedule.

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.

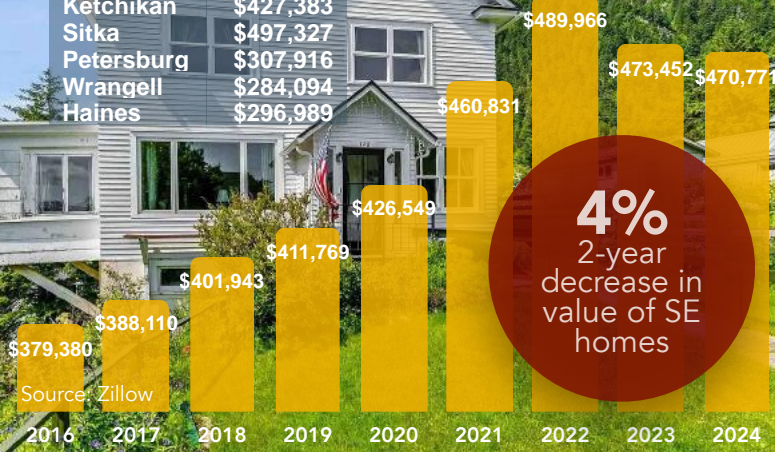


Average Value of a Single-family Home

Juneau, Ketchikan, Sitka, Petersburg average

July 2024 Values

Juneau	\$524,280
Ketchikan	\$427,383
Sitka	\$497,327
Petersburg	\$307,916
Wrangell	\$284,094
Haines	\$296,989



4%
2-year
decrease in
value of SE
homes



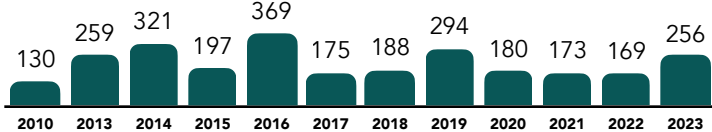
Kensington Mine

Housing Indicators

Southeast business leaders say that housing is the top obstacle to economic development in the region, with 61% of business leaders saying it is **critically important** for their local community to focus on housing over the next five years. Southeast has 28,854 occupied housing units.

New Housing: In the past 10 years, Southeast communities added more than 2,300 new permitted housing units, a 9% increase, including nearly 1,300 single-family homes, 400 multi-family homes (2-4 units), and 600 apartment units. 2023 marked the highest year of new housing development since 2019.

SOUTHEAST NEW HOUSING PERMITS BY UNITS



Growth in Single-Person Households: Southeast continues to experience a housing crisis, but the core cause has shifted. The rise of single occupancy households — from a quarter of all regional households to a third — has erased many inventory gains. This is primarily due to a demographic shift. There are more residents aged 65 and older, a segment that is more likely to live alone, generating more than 1,400 new single-occupancy households in the past eight years.

Rental Housing: The region has more than 10,000 rentals. Based on a 2023 survey of 2,100 rental units in the region by the Alaska Department of Labor, the overall rental vacancy rate was 4.5%, similar to 2022. Two bedroom units have the lowest vacancy rates, at 3.8%. A healthy vacancy rate is considered to be approximately 8%. The average adjusted rent in Southeast Alaska was \$1,392 in 2023, a 6.8% increase over 2022. Sitka the lowest increase at 1.6%, while Ketchikan rent increased by 9.4%.

2023 SE RENTAL VACANCY RATES



Short-Term Rentals: Use of short-term rentals, like Airbnb and Vrbo, have risen by 7% from 912 active listings in the summer of 2023 to 979 active listings in August of 2024. Just 140 of these regional listings are available all or most of the year (more than 270 days), making the overall impact on the housing market relatively low.

Sources: Air DNA, ADOL 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

1,061 Annualized Jobs in 2023

UP 59 JOBS IN 2023, WAGES UP BY 12%, +\$14M

2023 The mining sector continues to grow. Mining jobs in Southeast Alaska were up by 6% and wages were up by 12% in 2023.

The average annual mining wage was \$126,100 in 2022, more than twice the overall regional wage of \$60,226. 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 2024, Hecla Greens Creek had 520 full-time permanent employees (+14 from 2023) and continues to ramp up production and employment. Greens Creek is the largest private sector employer in Juneau as well as the highest taxpayer. In 2023, Greens Creek produced 9.1 million ounces of silver, similar to 2022.

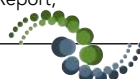
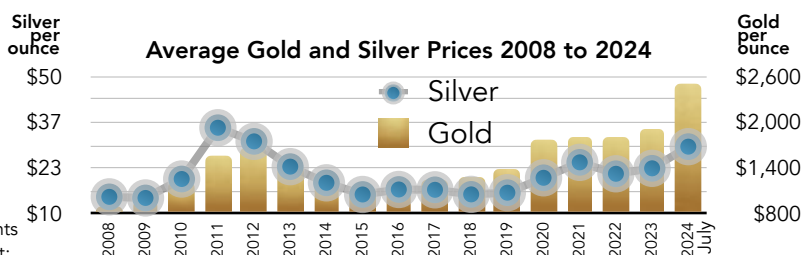
- **Coeur Alaska's Kensington** is exclusively a gold mine. Kensington had a production of 84,789 ounces of gold in 2023, a 22% decrease from 2022. In 2024, Coeur Alaska Kensington had a full-time permanent staff of 369 (-14 from 2023).

- **Dawson** is a smaller gold and silver project on Prince of Wales. Dawson Mine reported 48 full-time workers in 2024.

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.

The forecast for mining in the near term is positive with high metals prices and solid production from the area's producing mines. However, the industry continues to be challenged by the shortage of skilled labor.

Gold and silver have surged in 2024. Gold reached a new peak of \$2,500 in August 2024.





CONSTRUCTION



HEALTHCARE

Construction Industry

2,110 Annualized Jobs in 2023

JOBS UP 72, WAGES UP BY \$14 MILLION

2023

For the fourth year in a row, construction employment was up. Construction jobs increased by 4% (72 jobs), while wages grew by 9% in 2023. Construction

workers in the region earned \$167 million, representing 6% of all regional workforce earnings in 2023. Early data shows construction jobs increased by another 300 jobs in the first half of 2024.

Sector growth is limited by a lack of workers, not projects. The Federal Infrastructure Investment and Jobs Act (IIJA) has led to large construction projects across Southeast, but local firms must compete statewide and nationally for workers as similar investments into infrastructure projects are occurring across the US. Local business leaders say that the workforce shortage makes it difficult to develop projects.

By June 2024, IIJA awards totaling \$334 million for work across Southeast communities had been announced to support the region's roads, bridges, ports, airports, energy grids, communication systems, and ferries (note that ferry funding that was not Southeast specific is excluded from this list).

In Southeast in 2024, grants for federal infrastructure act funding, by community, include:

Infrastructure Act Awards in SE

Area	Millions
Juneau Borough	\$37.1
Ketchikan Borough	\$18.2
Sitka Borough	\$9.5
Petersburg Borough	\$10.9
Haines Borough/Klukwan	\$6.7
Wrangell Borough	\$29.5
Skagway Borough	\$20.5
Yakutat Borough	\$13.3
Prince of Wales Island	\$22.0
Hoonah	\$43.1
Metlakatla	\$19.7
Angoon	\$11.7
Kake	\$5.2
Gustavus	\$3.6
Hyder, Tenakee, Elfin Cove, Pelican, Port Alexander	\$2.1
Other Regional	\$80.6
Total SE Investment	\$334 Million

Health Care Industry

3,900 Annualized Jobs in 2023

JOBS UP 88, WAGES UP BY \$24 MILLION

2023

Southeast Alaska's 3,900 public and private healthcare workers comprised 8% of the regional workforce in 2023, earning 11% of all wages, \$312 million.

Healthcare is the biggest economic sector in Alaska — both in terms of jobs and wages — accounting for 13% of all workforce earnings and 11% of jobs statewide, having outpaced Alaska's historically-dominant sectors years ago. Through growth and turnover more than 7,500 new healthcare workers need to be hired across Alaska every year to keep up with staffing needs. Since there are too few Alaska healthcare workers to fill the demand for services in Alaska, job vacancies in the industry are increasing. Southeast Alaska medical facilities must compete statewide and nationally for high-demand healthcare workers.

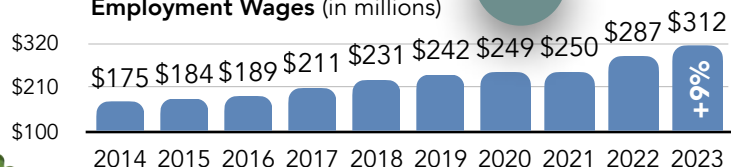
In 2023, the region added 88 healthcare jobs, amidst growing demand for services as the population ages. Southeast providers have repeatedly increased wages to remain competitive in attracting and retaining workers. Regional healthcare wages increased by 9% between 2022 and 2023 in an effort to compete for workers. Over the last 10 years total regional healthcare wages grew by \$137 million, a 79% increase.

The SouthEast Alaska Regional Health Consortium (SEARHC) is the region's largest healthcare provider with 1,222 staff in 27 communities in 2023 and a payroll (including benefits) of \$186 million. The next largest employer, Bartlett Regional Hospital, has a staff of 770, while PeaceHealth, the third largest, has a staff of approximately 500.

Early data indicates that regional healthcare jobs declined slightly in the first half of 2024.

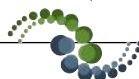
Southeast Alaska Health Care Employment Wages (in millions)

+79%
10 years



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

Photography credit: Petersburg Medical Center



GOVERNMENT



Government Jobs 2023
Municipal 5,090 Jobs +46
State 4,287 Jobs -47
Federal 2,031 Jobs +25
Tribal 1,356 Jobs +109

Government

12,778 Annualized Jobs in 2023

UP 134 JOBS IN 2023

WAGES UP BY 6%, \$50 MILLION

2023

Government workers made up 32% of all regional employment

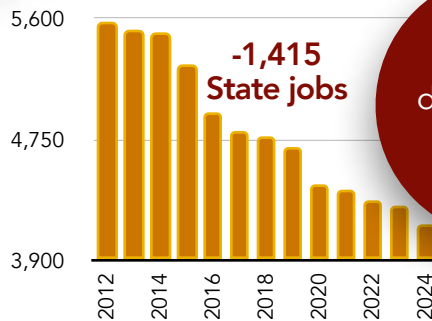
earnings (\$892 million) in 2023, and 27% (12,778) of the region's jobs. Overall public sector wages grew by \$50 million in 2023, an increase of 6%, while government jobs grew by 3%.

STATE GOVERNMENT LOSSES

Despite being home to the State Capital, the region's State government sector has been cut for 12 years in a row. From 2012 to 2024, State jobs have been reduced by a quarter, a decline of 1,415 annualized workers. Outside the region State jobs are down just 6% over the same period. Since 2022, the State added more than 1,000 new jobs outside of Southeast Alaska.

Southeast State Jobs

State jobs in the region are down for the 12th year in a row, for a total of 1,415 jobs lost since 2012, a decline of 25%



US COAST GUARD

The federal job count includes 668 active duty US Coast Guard (USCG) personnel. The USCG announced in August that the port of Juneau will serve as an icebreaker homeport base. The hope is that the 360-ft Aiviq will be ready with a limited crew by 2026, but deployment with the full crew of 190 is expected to take longer.

Homeporting preparations, such as improved mooring, crew facilities and increased housing, will boost the local and regional economy.

LOCAL GOVERNMENT

Because the local government has to absorb some public services reduced by the state, employment has increased. In 2023, local governments added 46 jobs, a 1% increase. Employment is also up in the first half of 2024. Local government workers consists of the following: 44% public administration, 40% public education, just over 2,000 workers in Southeast; and 16% public health care workers.

TRIBAL GOVERNMENT PROSPERS

Tribal government staff grew by 9% to 1,356 annualized workers in 2023, while wages grew by 13% to \$79.5 million — making it one of the fastest growing sectors in the region. In the past 7 years, tribal government jobs increased by 51%, and now make up 11% of all government jobs in the region, along with 3% of all Southeast jobs.

PERMANENT FUND CHALLENGES

Alaska's revenue structure is dependent on oil prices and permanent fund earnings. The \$81 billion Alaska Permanent Fund, which contributes more than half of the State's general fund revenue, has been posting negative returns. More money is being spent from the fund than is being deposited or earned through investments. Without sufficient earnings the fund could be unable to contribute to state services or pay dividends within the next several years.

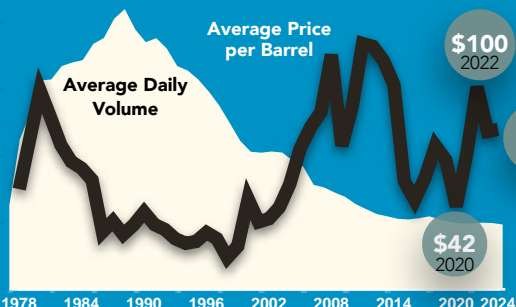
FEDERAL GOVERNMENT

Federal jobs were up by 1% in 2023 to 2,031, with associated earnings of nearly \$200 million. Early jobs data indicate that federal employment numbers will be up again in 2024.

Federal investments have been critical for restoring the regional economy post-pandemic, as more than a billion dollars have been spent in, or pledged to, the region.

Sources: ADOL Employment and Wage data; Alaska Department of Revenue Crude Oil Prices. Alaska Office of Management Budget.

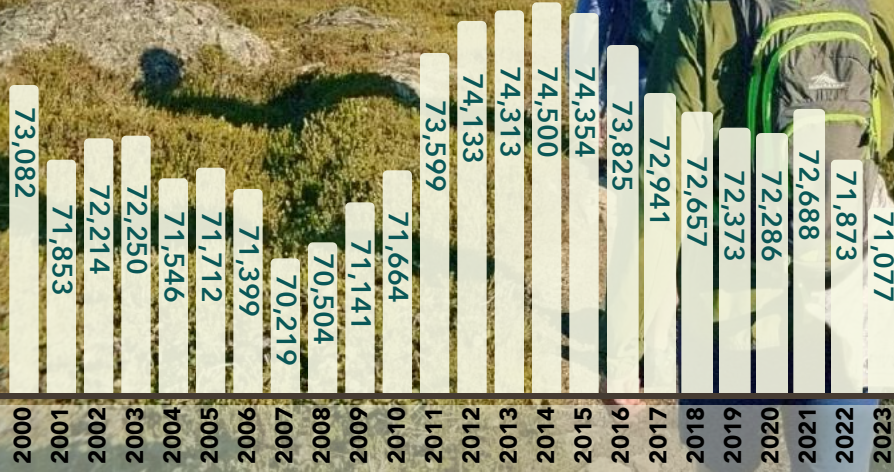
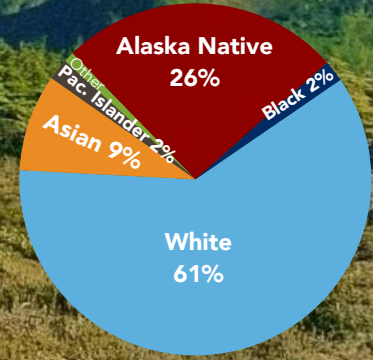
Avg. Daily Volume of the Trans Alaska Pipeline System and Inflation Adjusted Price Per Barrel, 1978-2023



DEMOGRAPHICS

Population 71,077

-796, -1.1%



POPULATION CHANGE 2022 TO 2023

Community	2022	2023	Change
Juneau Borough	31,834	31,549	-1%
Ketchikan Borough	13,776	13,475	-2%
Sitka Borough	8,354	8,231	-1%
Petersburg Borough	3,358	3,367	0.3%
Haines Borough	2,576	2,530	-2%
Wrangell Borough	2,085	2,039	-2%
Metlakatla	1,444	1,446	0%
Skagway Borough	1,147	1,127	-2%
Craig	993	1,019	3%
Hoonah	917	885	-3%
Klawock	694	696	0.3%
Yakutat Borough	673	677	1%
Gustavus	658	655	-0.5%
Kake	530	530	0%
Thorne Bay	447	478	7%
Angoon	340	343	1%
Hydaburg	348	337	-3%
Coffman Cove	201	191	-5%
Hollis	139	145	4%
Naukati Bay	131	130	-1%
Tenakee Springs	126	123	-2%
Whale Pass	84	91	8%
Pelican	83	90	8%
Klukwan	86	87	1%
Port Alexander	57	51	-11%
Kasaan	49	50	2%
Edna Bay	42	49	17%
Hyder	46	47	2%
Elfin Cove	38	38	0%
Port Protection	33	36	9%
Game Creek	18	18	0%
Point Baker	10	10	0%
Remainder	556	537	-3%
Total	71,873	71,077	-1.1%

2023 The region's population was down in 2023, declining by more than one percent to 71,077 residents, a loss of nearly 800 people. Although 15 communities saw population gains.

SCHOOL ENROLLMENT

K-12 enrollment was down by 1%, as school numbers fell by 106 students in 2023. However, losses were primarily experienced by Juneau and Ketchikan schools, and mostly at grade school level. Enrollment for K-5th grade in those two communities alone fell by 150 students. Ten of the region's smallest school districts gained students, for a combined 117 enrollment increase.

A CHANGING WORKFORCE

Southeast continues to have the state's oldest residents. Since 2010 — a year with a similar resident count to 2023 — the region lost more than 2,000 kids, while the 60-plus population grew by more than 7,000 older residents, from 17% of the overall population to 27%. Those of prime working age, aged 19 to 59, shrank by more than 5,600 residents. While many work well into their senior years, this demographic shift has resulted in a declining regional workforce.

MORE THAN ONE-QUARTER ALASKA NATIVE

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

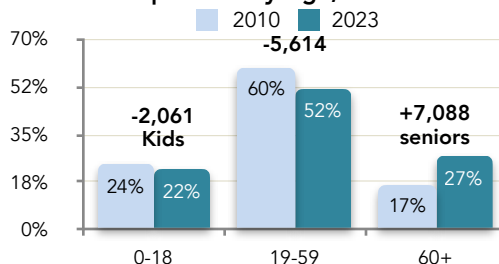
WORKFORCE RESIDENCY

In 2022, 7% of the Southeast workforce were Alaskans from other areas of the state, and 28% were non-Alaskans. Non-Alaskans earned 19% of all regional wages in 2022. Southeast's largest number of nonresidents work in seafood processing (68%). The sector with the most residents is utilities (89%).

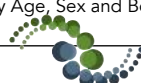
OUT MIGRATION

In 2023, nearly 800 more people moved away from Southeast Alaska than those who moved here, and deaths slightly outnumbered births. The majority of those who moved away left Alaska entirely.

SE Population by Age, 2010-2023



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).



Jobs by Community

Looking at all communities across Southeast in 2023, job counts were up in nearly every community compared to 2022. The largest 2022 to 2023 job gains percentage-wise included **Skagway** (+16%), **Wrangell** (+11%), **Haines/Klukwan** (+11%), **Hoonah** (+9%), and **Gustavus** (+9%). Two communities experienced continued job losses in 2023 compared to 2022. **Metlakatla** and **Angoon** each lost 2%-3% of all jobs.

Wages were up in every community, and more than half saw double digit wage increase percentages. The largest increases in total wages were seen in **Klukwan** (+25%), **Skagway** (+22%), **Wrangell** (+18%), and **Gustavus** (+18%).

Regional job rates remained below 2019 levels for many communities in 2023. Five communities had more jobs in 2023 than they did in 2019, including **Gustavus** (+37%), **Hoonah** (+21%), and **Yakutat** (+21%).

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 2022 TO 2023

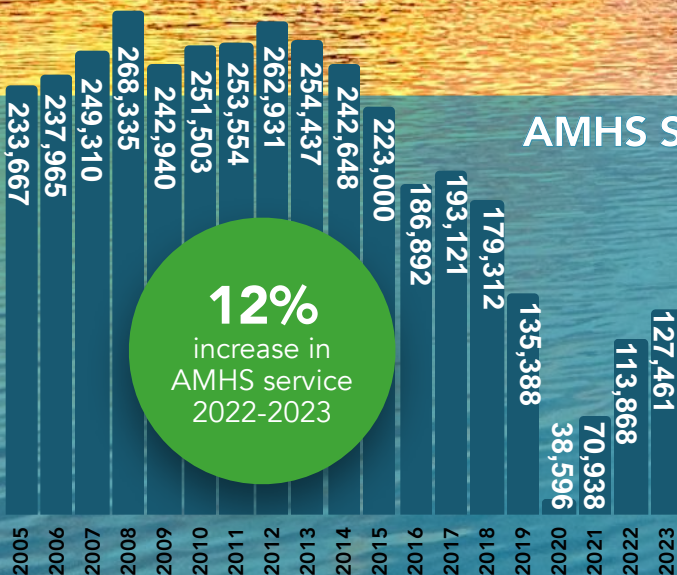
Community	2022 Annual Average Employment	2023 Annual Average Employment	2023 Wages in millions	Wages Change 2022-2023	Employment Change 2022-2023	Employment Change 2019-2023
Juneau	17,323	17,722	\$1,170.5	8%	2%	-1%
Ketchikan	6,963	7,281	\$432.6	9%	5%	-2%
Sitka	4,267	4,341	\$265.1	9%	2%	1%
Prince of Wales	1,393	1,436	\$73.0	10%	3%	-6%
Petersburg	1,244	1,253	\$67.4	10%	1%	-2%
Haines	913	1,017	\$46.9	16%	11%	-1%
Wrangell	673	749	\$41.3	18%	11%	-9%
Skagway	879	1,017	\$54.9	22%	16%	-6%
Metlakatla	503	493	\$27.9	4%	-2%	-2%
Hoonah SSA	476	520	\$26.5	15%	9%	21%
Yakutat	341	340	\$21.9	8%	0%	21%
Gustavus SSA	255	279	\$14.7	18%	9%	37%
Kake	161	166	\$6.1	5%	3%	-1%
Angoon SSA	138	134	\$4.7	3%	-3%	-13%
Hyder	38	42	\$2.6	13%	11%	-19%
Klukwan	48	54	\$1.3	25%	13%	6%

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

SOUTHEAST ALASKA GDP 2022 = \$5.5 BILLION
 Change 2021 TO 2022 = 31%

Source: BEA

AMHS Southeast Ridership



Ferry connectivity, long identified as the most vulnerable element of the regional economy, has been cut dramatically over the past decade. However, ridership was up by 12% between 2022 and 2023, as pandemic recovery continues. Although ridership of those coming to Southeast from outside the region is down by 17%, as marketing to the lower-48 market has been paused.

Ferry service in 2024 continued to be plagued by maintenance needs and a lack of workers. The Tazlina, Columbia, and Matanuska were out of service due to significant maintenance needs. The smaller fleet and just one operating mainliner meant another year without cross gulf service. The Kennicott heading to the shipyard in November. Lack of qualified crew continues to limit service.

The State continues to work with federal agencies to get three new ferries to replace the Tustumena and Matanuska, as well as one hybrid electric ferry constructed and ready for operations by 2028.

Source: AMHS.

JULY 2024 ECONOMIC SNAPSHOT

Change in July 2024 Jobs compared to July 2023 Levels: +400 jobs

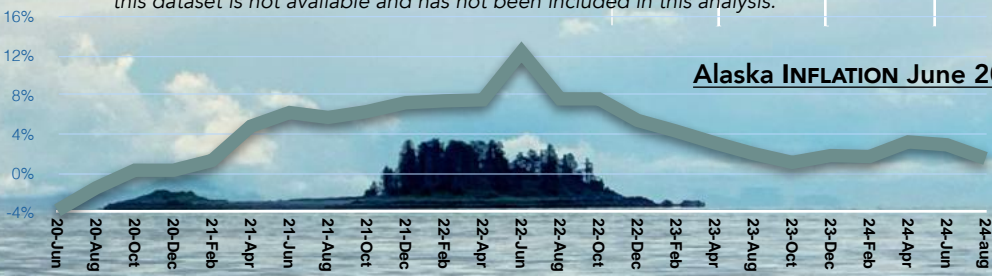
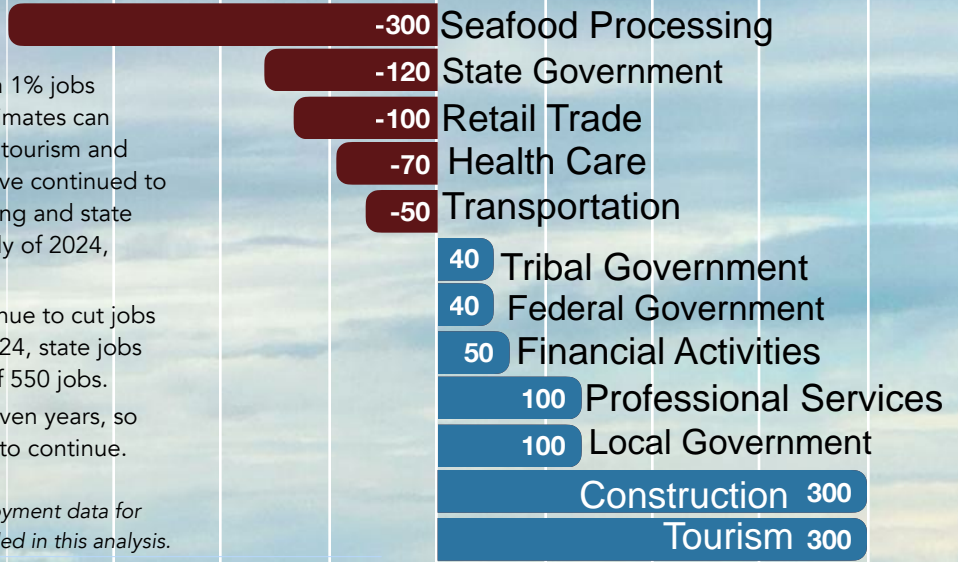
July 2024 versus July 2023 job counts

July 2024 jobs up **1.2%** Over 2023 levels

In July 2024 the regional job numbers were 400 above July 2023 levels, a 1% jobs increase. These early estimates can change, but as expected tourism and construction job counts have continued to grow, while seafood processing and state government jobs were down in July of 2024, compared to 2023.

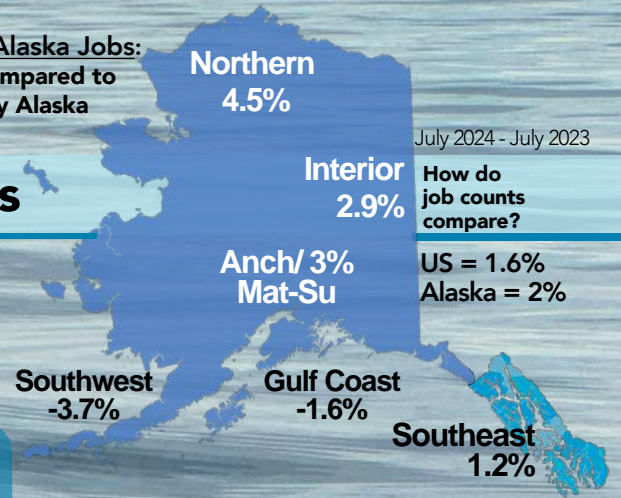
State government is the only sector that continue to cut jobs following peak pandemic losses. By July of 2024, state jobs were down by 12% over July of 2019, a loss of 550 jobs. Seafood processing jobs are always down in even years, so the losses in the seafood sector are expected to continue.

Note that 2024 numbers are preliminary. Self-employment data for this dataset is not available and has not been included in this analysis.



After rising post-2020, Alaska's urban inflation levels have normalized. Between August 2023 to August 2024, CPI rose 1.5%. Food prices rose 0.5%, energy prices increased 4.6%, and medical costs rose 9.4% according to the Bureau of Labor Statistics.

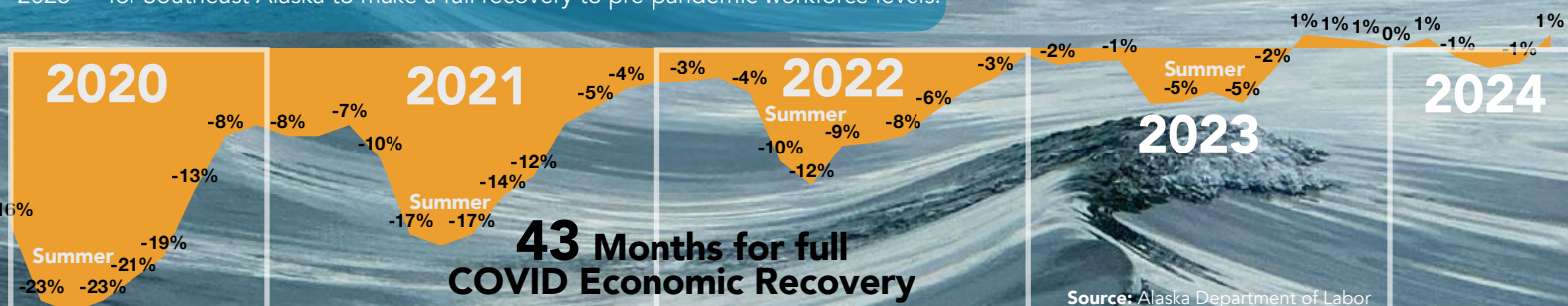
Change in Alaska Jobs: July 2024 compared to July 2023, by Alaska region



Southeast Employment Changes

SE jobs compared to 2019 Pre-pandemic Levels in the Same Month

Jobs in the Southeast region were down sharply in the wake of the pandemic, especially in the summer months. It took 43 months — April 2020 until November of 2023 — for Southeast Alaska to make a full recovery to pre-pandemic workforce levels.

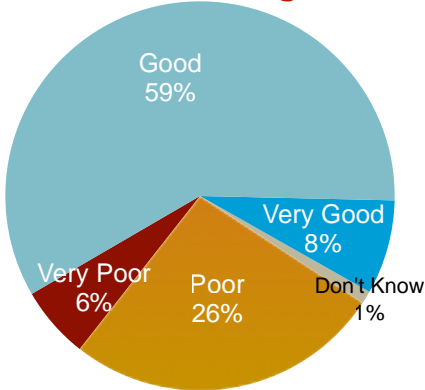


Source: Alaska Department of Labor

SOUTHEAST ECONOMIC OUTLOOK SURVEY

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

67% Positive / 32% Negative



2ND BEST BUSINESS CLIMATE SINCE SURVEY BEGAN IN 2010

In April 2024, 440 Southeast Alaska business owners and top managers from 25 communities responded to Southeast Conference’s Business Climate Survey. Approximately two-thirds (67%) have a positive view of the Southeast business climate, **making it the 2nd highest rated business climate since surveying began in 2010.** Only 2023 was better.

While many sectors have a positive perspective on the current economy, those leading **financial** organizations, **tourism** enterprises, and **construction** or **engineering**-focused businesses were the most positive; along with business leaders in **Skagway, Yakutat, Sitka, and Hoonah.**

The **seafood** sector was most likely to call the 2024 economy poor or very poor, along with business leaders in **Petersburg.**

Southeast Alaska Industry Strengths, Weaknesses, Opportunities, and Threats 2024

Seafood

- Top Strength: **High quality product**
- Top Weakness: **High costs**
- Top Opportunity: **Increase value-added processing**
- Top Threat: **Low seafood prices**

Visitor Industry

- Top Strength: **Natural beauty of region**
- Top Weakness: **Limited seasonal housing**
- Top Opportunity: **Workforce housing development**
- Top Threat: **Housing shortages**

Transportation

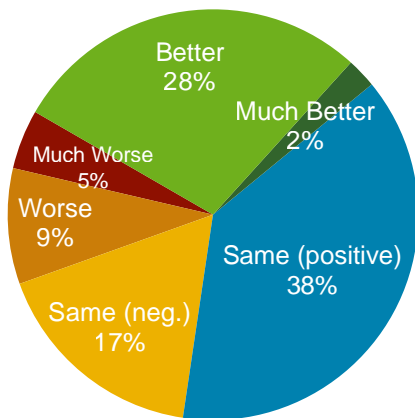
- Top Strength: **Connecting communities**
- Top Weakness: **Lack of qualified workforce**
- Top Opportunity: **Improve ferry service**
- Top Threat: **Demise of AMHS**

Energy

- Top Strength: **High % renewable/hydropower**
- Top Weakness: **High costs of infrastructure**
- Top Opportunity: **Heat pump installation**
- Top Threat: **Inadequate workforce**

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

68.5% Positive / 31.5% Negative THE OUTLOOK IS SOLID



Business leaders are also optimistic about the future. Almost a third of respondents expect their prospects to be better or much better over the next year, with an overall positivity rating of 68%.

The economic outlook for **Alaska Native** organizations, **tourism, nonprofits, and healthcare** are most positive moving into 2024. Communities with the most positive outlooks include **Hoonah, Skagway, and Ketchikan.**

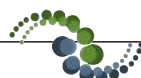
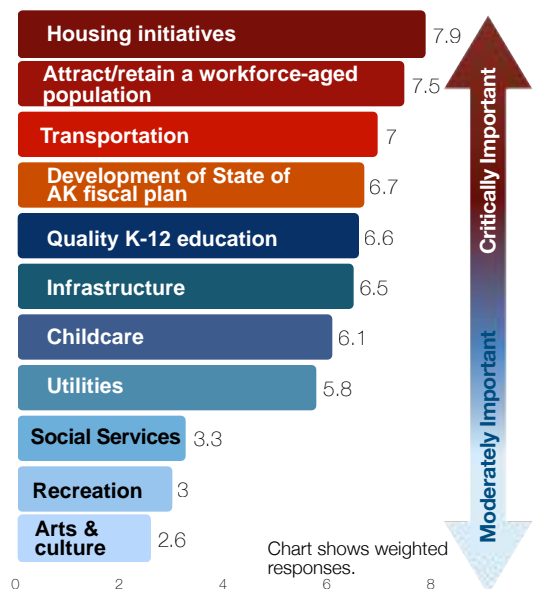
Seafood and **timber** have the most negative outlooks, along with community leaders in **Wrangell** and **Petersburg.**

Creating A Vibrant Business Climate: “How important is it to focus on these factors over the next five years?”

HOUSING, WORKFORCE, TRANSPORTATION SOLUTIONS ARE NEEDED FOR A VIBRANT SOUTHEAST ALASKA BUSINESS CLIMATE

Southeast Alaska business leaders were asked to rank the importance of focusing on 11 key element necessary for creating a vibrant business climate. **Business leaders continue to identify housing as the top obstacle to economic development** and critical for creating a vibrant business climate in the region, with 61% of business leaders saying it is *critically important* to focus on housing over the next five years. The housing shortage is deterring young families and workers from relocating to, or remaining in, the region. Half of regional business leaders say that **finding better ways to attract and retain workforce-aged residents to the region is critically important.** This is most strongly expressed by Juneau, Wrangell, Petersburg, and Ketchikan businesses leaders, where three-fifths of respondents say the need to attract young professionals over the next five years is critical.

Nearly half of business leaders say a continued focus on transportation remains a critical area of focus, a percentage that rises sharply in communities like Kake, Pelican, Gustavus, and Haines. The reduction of Alaska Marine Highway ferry service and lack of ferry reliability negatively impacts regional businesses.



ECONOMIC RESILIENCE: PRE-NATURAL DISASTER PLANNING

The cost of living in the breathtaking beauty of Southeast Alaska is that nearly all the homes and community infrastructure are under constant threat of natural disasters such as landslides and flooding. Our CEDS committee recognized the need for Natural Disaster Resiliency Planning, including two CEDS objectives pertaining to this issue.

Natural Disaster Planning Objective:

Support Disaster Preparation and Relief Efforts

Transportation Objective:

Disaster Resilient Transportation Infrastructure

Existing resources to help in the planning, response, and follow up to regional natural disasters include:



PREPARATION

Local Hazard Mitigation
Planning & Implementation

SOA Homeland Security Hazard Mitigation Section

ready.alaska.gov/Mitigation/LHMP | 907.428.7055

Alaska State Emergency Operations Center (SEOC)

www.ready.alaska.gov/ | 907.428.7100



DISASTER RESPONSE

State Emergency
Operations Center (SEOC)
AK Volunteer Organizations
Active in Disasters (VOADS)

AK State Volunteer Organizations Active in Disasters (VOADS)

A coalition of nonprofits, local and national.
akvoad@nvoad.org | 907.339.3440



POST-DISASTER DATA & FOLLOW-UP

AK Geo Surveys
Sitka Sound Science Center

Tribal Emergency Ops. Center, T&H
publicsafety@tlingitandhaida.gov | 907.463.7171

AK Geological/Geophysical Surveys
www.dggs.alaska.gov/hazards/ | 907.451-.0000

Sitka Sounds Science Center
www.sitkascience.org/research/ | 907.747.8878



WORKFORCE DEVELOPMENT

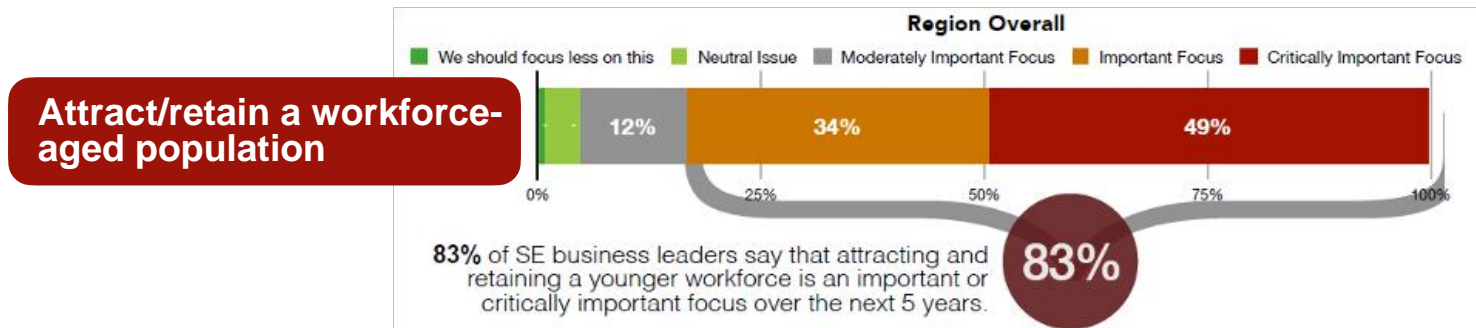
Alaska Municipal Disaster
Response & Mitigation
Partnership

**Alaska Municipal Disaster Response
& Mitigation Partnership**

www.akml.org | 907.586.1325

WORKFORCE DEVELOPMENT PLANNING FOR ECONOMIC RESILIENCY

Southeast Alaska has experienced a shifting and shrinking population over the past decade that has drastically impacted businesses in the availability of an equipped workforce, hindering businesses activities and expansion. With high job availability, regional entities are partnering to implement solutions for a prepared workforce to obtain employment.



As part of the five-year economic planning process, Southeast Conference committee leaders developed 16 economic initiatives focused on or including workforce planning. These are listed below, in order of priority to the region, according to Southeast Conference members:

Southeast Alaska Priority Workforce Objectives (Highest Priority Rating in CEDS)

1. **Ferry Objective:** Support the Stability, Sustainability and Longevity of the Marine Highway Systems of Alaska (See page 37 for 5-year plan)
2. **Child Care Objective:** Increase Child Care Capacity in Southeast Alaska (See page 39 for 5-year plan)
3. **Local Tourism Ownership and Entrepreneurship** (See page 43 for 5-year plan)
4. **Reduce Energy Costs and Increase Deployment of Renewables** (See page 44 for 5-year plan)

Southeast Alaska Workforce Objectives:

5. **Education Objective:** Partner with University of Alaska Southeast and K-12 school districts to build career pathways (See page 32 for full initiative)
6. **Workforce Attraction and Retention Objective** (See page 33 for full initiative)
7. **Mariculture Development** (See page 23 for full initiative)
8. Work to Further Promote a Year-round Seafood Economy in the Region (See page 23 for full initiative)
9. **Transportation Workforce Development** (See page 21 for full initiative)
10. Telecommunications Objective: **Improve Communications Access** in Southeast Alaska (See page 34 for full initiative)
11. Support Access to Capital for **Seafood Harvesters and Processors** (See page 24 for full initiative)
12. Promote **Beneficial Electrification** (See page 28 for full initiative)

Southeast Alaska Committee Level Workforce Initiatives (lower priority level, see appendix document Potential Southeast Conference CEDS Initiatives 2030 for full initiatives):

13. **Seafood Sector Workforce Development** (page 19)
14. Community-Based **Timber Workforce Development** (page 25)
15. **Mining and Exploration Workforce Development** (page 25)
16. **Training to Support the Unique Needs of SE Alaska's Visitor Industry** (page 13)

Measuring Economic Resilience: Southeast Conference will continue to measure economic resilience through its annual business climate survey. Each spring, approximately 450 Southeast Alaska business owners and top managers from 25 communities participate in the Southeast Conference's Business Climate Survey, representing 11,000 workers and 22 economic sectors. They are asked about the economic climate, business outlook, and hiring expectations; along with ongoing workforce, housing, transportation, infrastructure, and industry needs. The survey is longitudinal, and has been conducted since 2010, so that resilience trends can be mapped and analyzed.

Southeast Alaska Strategic Direction Action Plan

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

Transportation



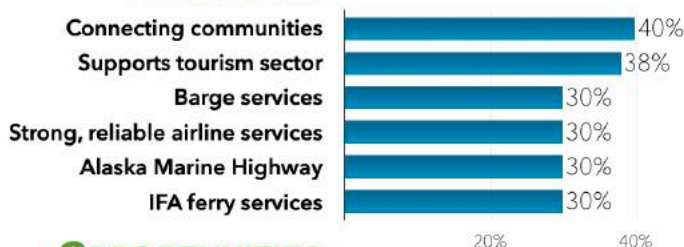
Transportation Goal Statement:

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.

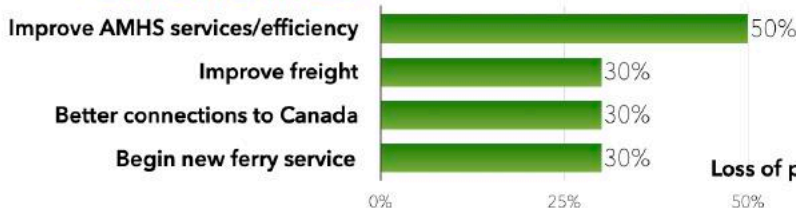
Summary of Top SWOT Responses

The Southeast Alaska Transportation SWOT and economic initiatives were developed and prioritized by the 28 members of the Transportation Industry Committee in a series of meetings in 2024.

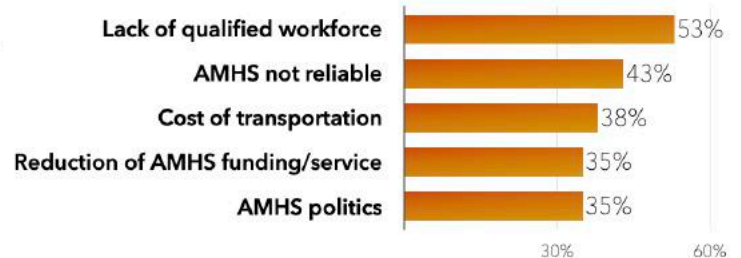
STRENGTHS



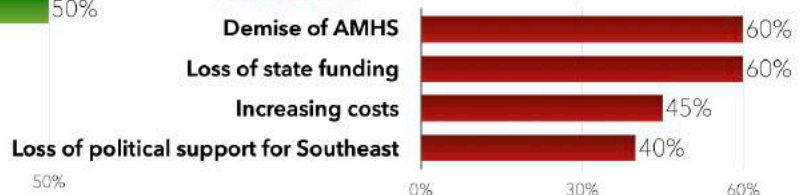
OPPORTUNITIES



WEAKNESSES



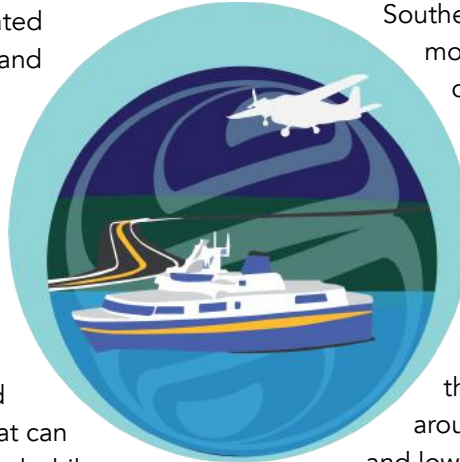
THREATS



Transportation Priority Objective

★ Priority Objective #1: Support the stability, sustainability and longevity of the Marine Highway Systems of Alaska

With many geographically remote and isolated communities that cannot be connected via traditional roads, the Marine Highway Systems in Alaska must provide reliable, basic transportation service for passengers and freight to coastal communities, create an economy of scale, and provide cost-effective transportation services. In a coordinated effort to restore, strengthen and expand critical service, investment is needed in a strategic, long-term and short-term plan that includes bridge capacity support through private sector transportation partnerships. Public and private collaboration can improve reliability, efficiency, affordability and stability. Pursue standardized and appropriately-sized fleet and terminal modernizations that can be realistically and manageably staffed while meeting essential service needs with potential for economic growth to communities. Design the system for a smaller workforce and increased efficiency and automation, to mitigate impacts and constraints faced with limited available personnel. Develop targeted workforce development programs and a schedule for job consistency to reduce turnover. Advocate for State and Federal support of all system components. Strategically and expeditiously pursue and obligate PL 117-58 funds.



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, collaborative, multi-modal approach to transportation



Objective #4: Ports and harbors infrastructure improvements

Ports and harbors within Southeast communities serve as economic hubs. Advocate for publicly supported and desired port and harbor infrastructure improvements, upgrades and maintenance. Address current user needs while exploring opportunities to develop these facilities beyond traditional uses for maximum public benefit and equitability. Utilize local networks, including private sector, to stimulate modernization investments with the

planning through the regional Southeast Alaska Transportation Plan (SATP) process. Work with federal, state, Tribal, and public and private local stakeholders for full network alignment and coordination. Develop an action plan that will ensure the region's multi-modal transportation system meets the needs of the region's people and economy.

Objective #3: Improve and expand opportunities to move freight to and from markets

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 and create a more resilient freight system. Explore freight forwarding at the international border. Design systems around the large fishery summer markets and lower ferry capacity in the winter.

Determine the best, safest, most reliable way to move perishables to and from markets in Southeast. Support collaboration for alternative service options to communities with limited freight services, especially in the winter. Invest in, and support, the resilient infrastructure improvements communities need to accommodate reliable barge service and/or other freight transportation operations safely.



objective of improving the opportunities, reliability, continuation, and effectiveness serving the entire port and harbor network and community. Strengthen the supply chain to reduce the cost of transportation of goods to Southeast Alaska. Include infrastructure for multi-modal transportation methods such as float planes, including floats and fueling stations. Incorporate alternative energy sources/opportunities at ports and harbors.

Objective #5: Transportation Workforce Development

All transportation types and providers face impacts to operations due to lack of available workforce, causing additional costs, delays and reduced services to communities. Pursue, support and collaborate on workforce development, attraction and retention efforts through improved education, certification/licensing management, marketing and housing development programs. Design programs to gain primary and secondary school-age kids' interest. Prepare individuals through appropriate and locally-available secondary education and increase completion rates. Support accessible, high-quality and modern training programs for professional certifications that are vital to the workforce of the transportation industry.

Objective #6: Ensure the stability and safety of passenger transportation services

The passenger transportation networks in Southeast Alaska serves as a critical economic engine for the region, generating jobs, commerce, and tourism while also increasing community wellbeing through accessibility to jobs, health care and other residential needs. Support consistency in providing federal and state funding for continued maintenance and operations of all transportation modes and service areas in order to ensure safe systems with more long-term certainty and predictability. Facilitate discussions for solutions to transportation gaps of service. Pursue and strengthen partnerships with the private sector to reduce burden and costs on public entities while also capitalizing on improved efficiencies and increased system resiliency. Incorporate active transportation

elements into road development or restoration efforts to increase safety and opportunities for non-motorized transportation users.

Objective #7: Improve marine and road connection to Lower 48

Southeast Alaska and its supply chain has long benefited from a secondary connection to the contiguous United States through the Canadian Port of Prince Rupert. Establish a secondary port connection to the lower 48. Mitigate the impacts of constrained supply chain through better connection to road and rail as well as connection to services and new opportunities. Allow for alternative supply and market opportunities across Canadian border supply chains and exporting locally-manufactured products into Canada.



Objective #8: Disaster Resilient Transportation Infrastructure

Disaster events are becoming increasingly disruptive due to climate change. Design and invest in transportation infrastructure through strengthening and protecting evacuation routes, enabling communities to address vulnerabilities and increasing the resilience of transportation infrastructure that can better withstand the impacts of sea level rise, flooding, landslides, wildfires, extreme weather events, and other natural disasters as well as be utilized to better respond to disasters. Develop secondary roadways, prioritizing critical pathways within communities to sustain the movement of people and provide system redundancy. Such infrastructure will improve disaster response and regional resilience.

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.



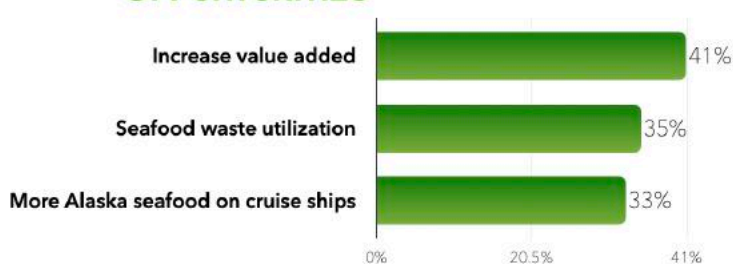
Summary of Top SWOT Responses

The Southeast Alaska seafood SWOT and economic initiatives were developed and prioritized by the 16 members of the Southeast Conference Seafood and Maritime Industry Committee in a series of meetings in 2024.

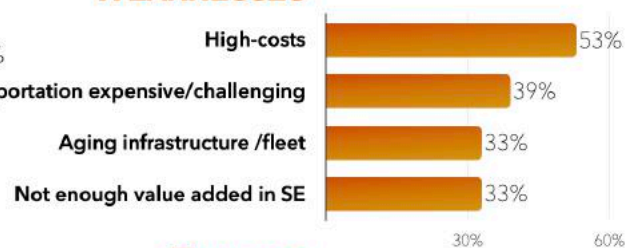
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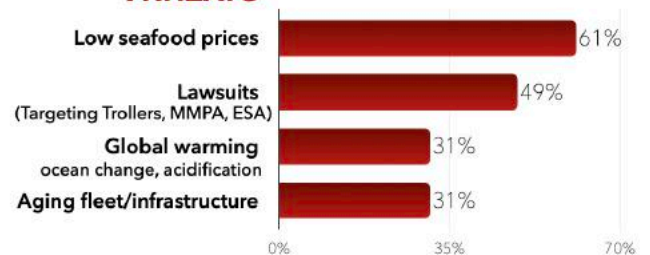
OPPORTUNITIES



WEAKNESSES



THREATS



Seafood Priority Objective

★ Further Develop Markets for Alaska Seafood

Support marketing efforts to expand existing and develop new domestic and international markets for Alaska seafood. Additionally, encourage efforts to develop new products and increase utilization, promote the origin and sustainability of Alaska seafood, guide research opportunities, and advance seafood friendly policies. **(Read full initiative on page 41)**

★ Seafood Modernization Initiative

The Seafood Modernization Initiative, led by the Alaska Fisheries Development Foundation (AFDF), provides a comprehensive framework to revitalize the industry, support economic well-being in coastal communities, and ensure long-term sustainability for Alaska's fisheries. **(Read full initiative on page 45)**

Other Seafood Objectives:

Objective #3: Work to Further Promote a Year-round Seafood Economy in the Region

Work to expand upon existing economic activity of the summer salmon harvesting season to insulate local economies by supporting additional processing and direct marketing opportunities. Support the processing of products throughout the year, including value-added products, to help establish a year-round seafood workforce and create more economic activity in between fishing seasons. Consider economic incentives for seafood processors and direct marketers to develop value-added seafood products that are produced within the region, rather than shipping out products for reprocessing. Encourage increased participation in mariculture activities and lower-volume fisheries in shoulder seasons to increase year-round economic activity, including small and medium processors more likely to undertake these activities. Explore and support ways to diversify and overlap the ocean-based, product-type businesses, so they complement each other and build alignment between

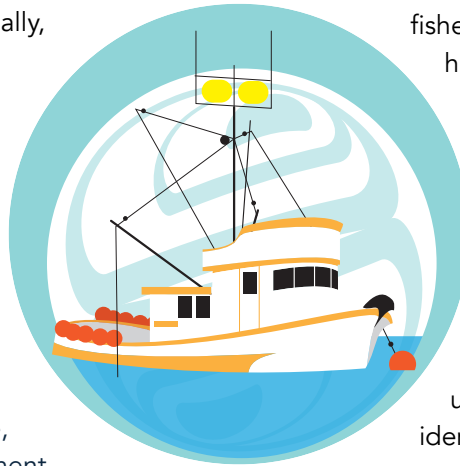
opportunities the fleet wishes to pursue and processing operations.

Objective #4: Full resource utilization and ocean product development

Increase total revenue from existing commercial fisheries in the region by developing new, higher-value products and markets from low-value products and seafood waste. 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 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 to create value-added products with the same resource and provide additional economic benefits to local economies, particularly for seafood dependent communities.

Objective #5: Mariculture Development

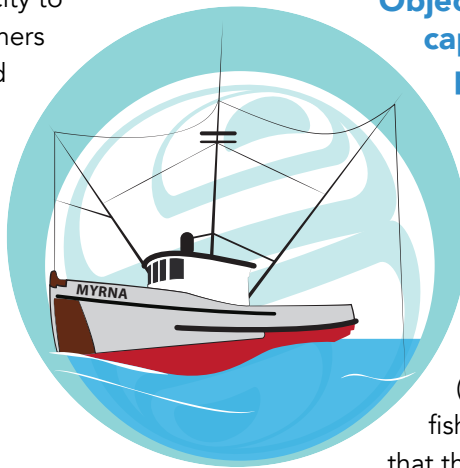
Accelerate the development of a viable and sustainable mariculture industry, producing shellfish and seaweed for the long-term benefit of Alaska's economy, environment, and communities. Leverage existing resources and partnerships to build a sustainable, robust industry with a heartbeat of equity and a goal of sustainable economic development that creates jobs and household incomes. Maximize existing resources and partnerships including the Alaska Mariculture Cluster's (AMC) Build Back Better Regional Challenge (BBBRC) to overcome barriers to development and achieve scale. Increase the number of mariculture operations, providing financial and technical support for mariculture entrepreneurs. Continue to build the Alaskan brand of mariculture products by marketing their superior quality, sustainable practices and positive environmental impact. Support increased hatchery capacity and seed production and quality, including stability for operations, technical knowledge transfers, 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 frozen oyster products and markets. Support development of regional and sub-regional multi-use facilities for processing, storing, aggregation and shipment. Support research, community engagement, and education for mariculture in the region.

Objective #6: Bring Back Seafood Jobs to Southeast's Smallest Communities

Many of Southeast Alaska's small rural communities have been seafood economies for hundreds if not thousands of years and have a heavily reliance on the seafood sector. However today many of these communities are also experiencing a loss of seafood jobs with the outmigration of permits, loss of processing capacity, and a decrease in high-paying crew jobs. Many members of small indigenous communities are unable to participate in commercial fisheries today because of lack of ownership of permits and quota required and the high cost of entry necessary to purchase permits, a vessel, and equipment. The high cost of entry is a significant limiting factor for local participation, especially in communities where there are already limited economic opportunities to generate cash. Industry stakeholders will work collaboratively to find ways to bring seafood economies of scale back to the region's smallest communities through exploring opportunities to increase participation in fisheries, supporting processing and buying operations in small communities, providing educational services to help build seafood businesses, and assessing potential policy changes. Foster collaboration between stakeholders to find creative solutions to logistical challenges. Increasing seafood jobs within small communities builds resiliency and can help support subsistence opportunities.



Objective #7: Support access to capital for harvesters and processors

Advocate for changes to the State's fisheries revolving loan fund to make the process more streamlined and more functional. Also increase loan guarantees and low interest loan options for processors. Make USDA programs (including loans) available to fishermen and seafood processors so that the seafood industry receives comparable assistance to the agriculture and farming industry. Collaborate with the Federal delegation and state representatives to secure increased funding for programs that support Alaska fishermen and processors, including grants or other incentives for infrastructure improvements, workforce development, marketing, nutrition programs, and other necessary business operations. Advocate for expanded federal support that addresses the specific challenges and opportunities facing Alaska seafood harvesters and processors. Expand use and allocations of the SK funds for use as originally designed for and seafood tax credits to allow for use on additional types of equipment and improvements.

Objective #8: Maintain a stable regulatory regime

Protect commercial fisheries by advocating for stable regulatory and management regimes. Support research and data collection by state and federal agencies and other research institutions to ensure policies and management decisions are based on the best available science and decrease uncertainty surrounding the industry. Help foster collaborative efforts between regulators, the seafood industry, universities, and other stakeholders. Educate policy makers and regulators to employ responsible and sustainable harvest decisions for Alaska seafood and other ocean products. Leverage long-term investment through a predictable regulatory structure and enhanced knowledge on the processes of Alaska fisheries management.

Visitor Industry



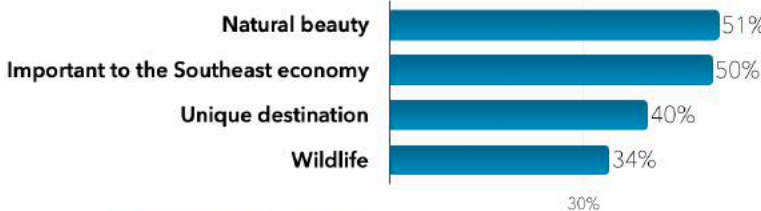
Tourism Goal Statement:

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

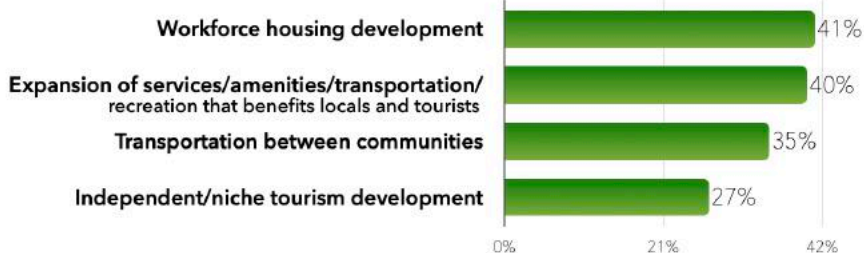
Summary of Top SWOT Responses

The Southeast Alaska tourism SWOT and economic initiatives were developed and prioritized by the 22 members of the Southeast Conference Tourism Industry Committee in a series of meetings in 2024.

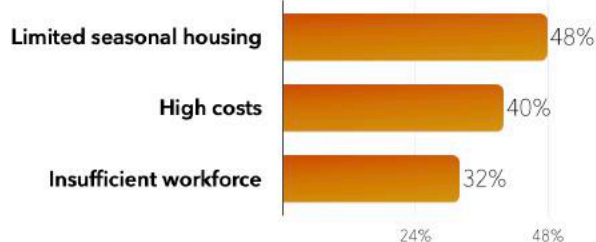
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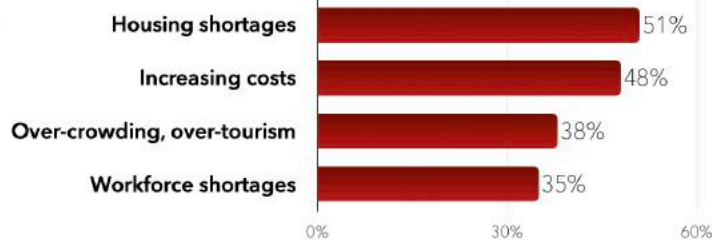
OPPORTUNITIES



WEAKNESSES



THREATS



Visitor Industry Priority Objective

★ Support local tourism ownership and entrepreneurship

By fostering local ownership and entrepreneurship, the visitor industry can create sustainable economic opportunities, enhance cultural preservation, promote environmental stewardship, and help ensure long-term prosperity in the region. Success requires a holistic approach, ensuring residents have the knowledge, resources, and access needed to develop and expand tourism businesses. Strategies will empower local entrepreneurs by building skills in business development, management, financing, and marketing that are tailored to Southeast Alaska.

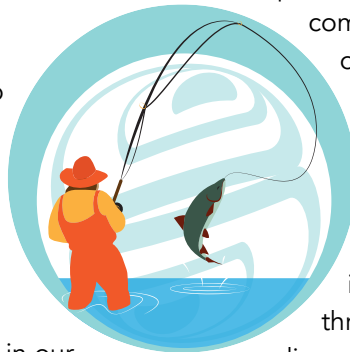


architecture, historical and cultural heritage, food, literature, and music. It encompasses Indigenous lifestyles, value systems, beliefs and traditions. It can include Native artists and storytellers; Alaskan excursions ranging from walking tours, cruises, guided hunting and fishing, and includes unique experiences with Native foods and arts. Develop marketing programs and work with DMO's to reach various operator types, travel media and affinity tourism. Help connect those developing cultural tourism opportunities with those that can bring it to market and provide support services. Grow the opportunity for cultural host training through more offerings and getting more trainers in the region.

Other Visitor Industry Objectives:

Objective #2: Workforce housing for visitor's sector

Support efforts that address the critical need for housing in Southeast Alaska, specifically to address the workforce and community needs being impacted by the region's fast-growing visitor industry. Collaborate with local stakeholders, including government agencies, private developers, and community organizations, to facilitate the development of effective and sustainable housing solutions. Collaborate to develop a variety of housing models suitable for the Southeast Alaska climate that can meet the need of growing, seasonal visitor industry workforce well also retaining and allowing opportunity for year-round residents in our region. Find regional solutions and solutions that work in our region. Collect input from seasonal workers to better understand needs and existing challenges. This will serve to enhance the region's capacity to attract and retain a skilled workforce essential for the tourism sector's growth while reducing impacts on locals.



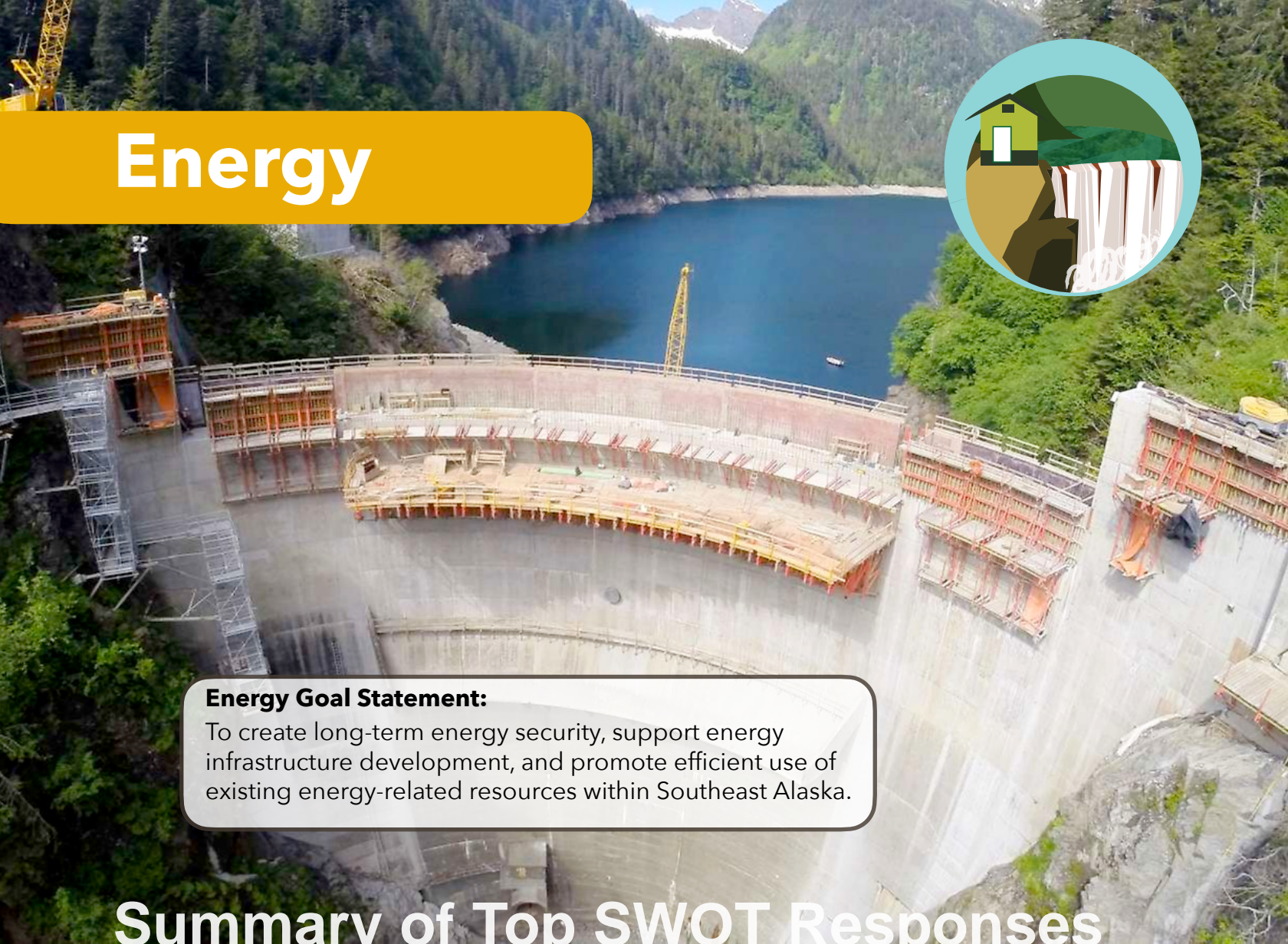
Objective #4: Collective regional strategy for accommodating tourism industry growth in Southeast Alaska

Create a comprehensive regional strategy for Southeast Alaska's growing visitor industry that focusses on sustainability, alleviating overcrowding and can accommodate the pressures of growth. Work with state and federal partners and planning efforts such as the USFS Tongass Plan Revision to open up, expand and increase access to public lands for new commercial and non-commercial opportunities. Collaborate with municipal and tribal governments, cruise operators, and industry stakeholders to identify alternative visitor destinations that do not negatively impact other industries and users. Develop infrastructure improvements that disperse visitor traffic throughout each community and that offers a diverse and expanded range of business products for a diverse array of visitor types. Through stakeholder engagement and impact assessments, the region can responsibly promote the broad and appropriate range of products to meet demand. Promote responsible tourism practices that preserve Alaska's natural beauty and cultural heritage for future generations, while simultaneously minimizing conflicts and maximizing benefits to local residents. Work with government agencies to ensure planning efforts support accessibility and balanced usability of public lands.

Objective #3: Cultural Tourism Development

Support the enhancing, enabling, and empowering of Alaska Native and tribally-owned businesses, communities, and organizations efforts to grow cultural attractions. Cultural tourism includes art and

Energy



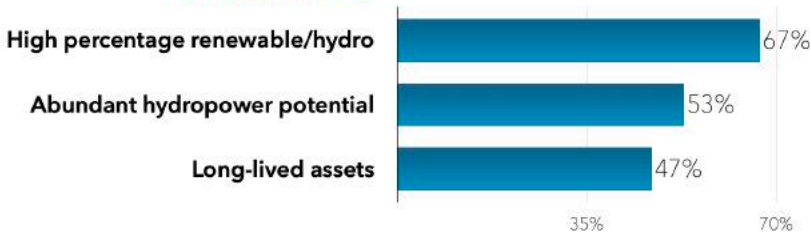
Energy Goal Statement:

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

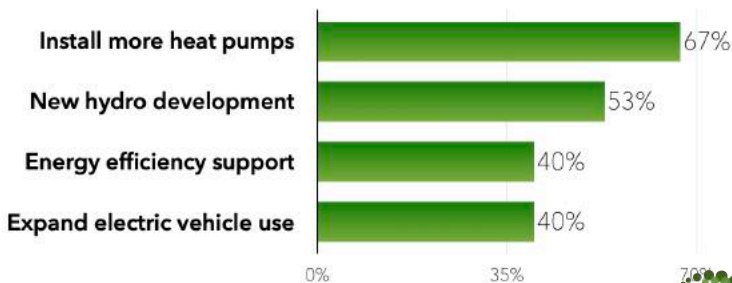
Summary of Top SWOT Responses

The Southeast Alaska energy SWOT and economic initiatives were developed and prioritized by the 24 members of the Southeast Conference Energy Committee in a series of meetings in 2024

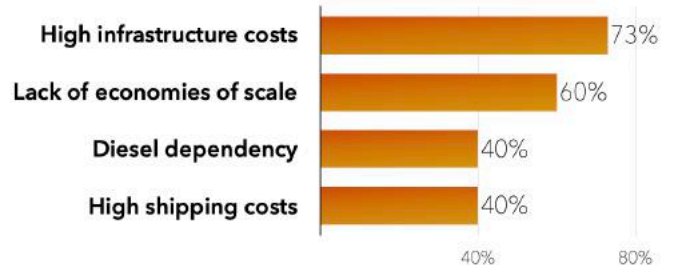
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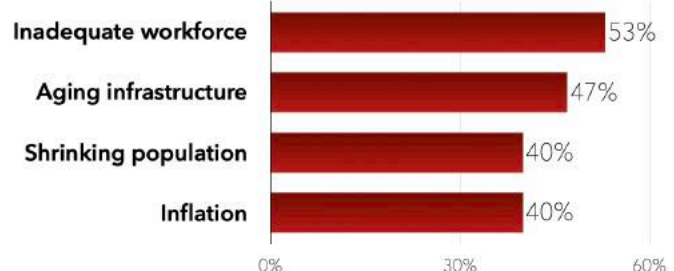
OPPORTUNITIES



WEAKNESSES



THREATS



Energy Priority Objective

★ **Priority Objective #1: Reduce energy costs and increase deployment of renewables**

Encourage and facilitate public/private partnerships that connect utilities, technology providers, and other energy companies with local, state, Tribal and federal agencies to advocate for renewable energy development that reduces cost and creates community resiliency. *(Read full initiative on page 44)*

Other Energy Objectives:

Objective #2: Promote beneficial electrification

Work with utilities, local, state, federal and Tribal governments, and energy stakeholders to expand usage of renewable resources in the region. Collaborate to develop marketing and education campaigns, and to implement innovative rates and programs that encourage beneficial electrification. Work with communities to support consumer adoption of technologies that can be added to the electric system in a manner that reduces consumer cost and increases grid value. Support workforce development, training, and technical assistance to ensure maximum environmental and economic benefit. The primary opportunities for beneficial electrification in Southeast Alaska include heat pumps and electric vehicles, electric transportation systems and chargers. Heat pumps offer significant benefits by efficiently providing both heating and cooling while reducing reliance on heating oil. Their ability to extract heat from the outside air, even in cold temperatures, makes heat pumps a cost-effective and eco-friendly solution for Southeast Alaska. As technology continues to improve, electric public transportation such as public buses are proving to also be viable community transportation method. Other opportunities for beneficial electrification include short-run ferries and dock electrification. Robust analysis of these opportunities are needed to determine social, economic and environmental impacts to guide future investments.

Objective #3: Support consumer education on heat pumps

Educate building owners and managers on the performance, use and benefits of heat pump

technology. Work with residential users to improve understanding of how a heat pump system may work in their homes, how it may integrate with an existing heating system, and how it may lower home heating costs. Ensure awareness of financial assistance programs, program eligibility requirements, and opportunities to use funding from multiple sources to maximize savings. Educate existing heat pump users about routine maintenance and general system operations in order to optimize system performance and maximize useful life.

Objective #4: Policy and regulatory development to meet community energy needs and priorities

Collaborate with communities, utilities, policy makers, regulators and other stakeholders to establish reforms that benefit customers, streamline processes, reduce barriers, and foster innovation and investment in the energy sector.

Objective #5: Continue to support PCE for rural communities

Continue to support Southeast communities reliant on diesel fuel and facing high energy costs. Work to secure continued access to renewable energy funding for rural communities and to preserve the Power Cost Equalization (PCE) Endowment program. PCE is a critical lifeline that provides access to affordable electric power for rural Alaska communities that have not benefited from large public investment in power generation. Continue to seek opportunities to optimize and modernize the PCE program to maximize benefits to rural communities, and encourage new investment in renewables that help reduce the cost that consumers pay for energy.

Objective #6: Support Southeast Alaska's biomass initiatives

Engage with communities to prioritize use of local resources to address energy needs. Biomass serves as a renewable source of thermal energy through use of organic materials such as wood, agricultural residues, and organic waste. Biomass utilization reduces reliance on fossil fuels and can reduce heating costs while serving as an effective and climate-friendly job creator. Biomass is a sustainable energy source in Southeast Alaska and should continue to be evaluated for uses beyond thermal energy, e.g., as potential feedstock in the production of synthetic fuels such as electrofuels and biofuels.

Natural Resources



Natural Resources Goal Statement:

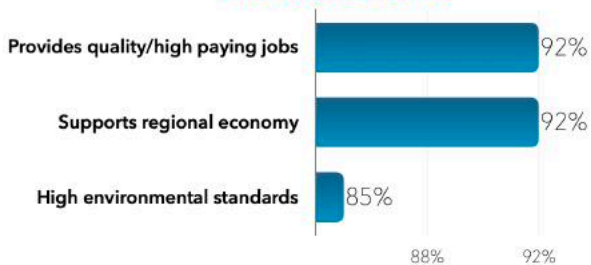
Support responsible development in Southeast Alaska.



Summary of Top SWOT Responses

The Southeast Alaska mining SWOT and economic initiatives were developed and prioritized by the 20 members of the Natural Resource Committee in a series of meetings in 2024.

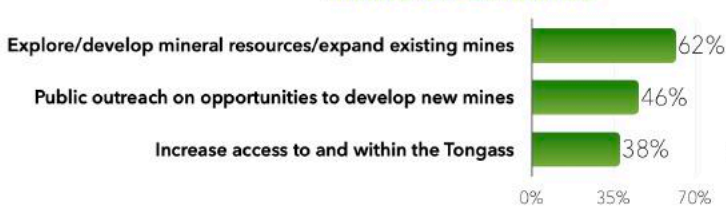
MINING STRENGTHS



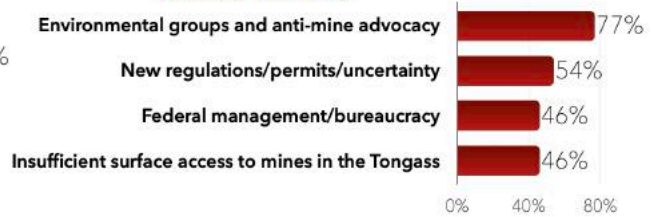
MINING WEAKNESSES



MINING OPPORTUNITIES



MINING THREATS



Natural Resources Objectives

Objective #1: Prepare for potential Chinook salmon listings

Two populations of Chinook salmon are currently listed as endangered, and seven are listed as threatened under the Endangered Species Act. While none of these populations are located in Alaska or Southeast, the listing of Chinook salmon in Southeast Alaska could have enormous regulatory and industry impacts across the natural resource sectors. While the decline of salmon populations appears to be related to changes in ocean temperature and food supply, and are not habitat related, the use of habitat areas could be heavily regulated should such a listing occur, with substantial permitting process changes. Prepare in advance for these potential changes to reduce the impact on regional industries.

Objective #2: Work with USFS to direct federal contracts toward 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 #3: Support an innovative, integrated timber industry

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. Explore and lean into technology innovation to make operations more efficient, create new opportunities and leverage success. Develop new and boutique markets for AK forest products, including consideration of the demand for old growth products. Create collaborative opportunities and shared costs to reduce operating costs for small and new ventures. 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: Attract capital investments, maintain global competitiveness

Highlight Alaska, and particularly Southeast, projects as stable and attractive investments to support a balanced investment portfolio. Attract investors from inside and outside Alaska and uncover regional funding as an opportunity to maintain Southeast projects with Southeast capital as an overall economic growth strategy. Maintain an economically-competitive environment in the face of the increasing cost of supplies, labor, taxes, road maintenance, operations, and supply costs. Create a broad statement telling the Alaska and Southeast story as reliable and safe investments opportunity for both mineral and timber. Invest and incentivize Southeast businesses providing services to existing exploration projects and operations to foster competitiveness with global markets and brands.

Objective #5: Provide an economically viable supply of timber from the Tongass to regional operators

Support management, research, and legal efforts to assure access to adequate, consistent, and economic three-year 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: 1) plan orderly and systematic harvest schedules that meet timing restrictions and permit requirements; 2) better manage its financial resources and to secure financing on the basis of longer-term timber supply; 3) allow time for infrastructure maintenance; and 4) give the industry more opportunity to sustain itself through erratic market cycles.

Objective #6: Advocate for the regulators

In order for the region's natural resource sector to be successful, the government workers regulating these industries must be provided with the tools they need to act quickly and judiciously. Ensure the departments that oversee regulations are properly funded and staffed. Support the educational institutions that train regulators to ensure they are of the highest quality. Ensure that mutual sharing of information happens expeditiously so that successful permitting decisions can be arrived at quickly. Support the regulatory process and the people responsible for overseeing the process.

Objective #7: 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 road access for the mining industry and hydroelectricity in the Tongass. Energy and road access are two of the major obstacles to mining 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 Inventoried Roadless Areas (IRAs).

Objective #8: Revise the Tongass National Forest Land Management Plan

Support the development of an updated management plan for the Tongass that is realistically responsive to industry needs and 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, allowances and guides to reflect modern and full utilization of the forest for more environmentally- friendly and sustainable harvest practices. Revisit Land Use Designations, and updated fall-down calculations. Support efforts to get land back into State ownership that are owed to the State. 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 plan.





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 2024. They have been prioritized in the order presented below:

Other Objectives

Priority Objectives

★ **Priority Objective #1: Housing objective: Support the sustainable development of housing**

Insufficient housing stock, deteriorating housing quality, and high housing costs are a deterrent to economic growth, making it difficult to attract or retain employees in the region. Develop new housing stock, improve existing housing quality, build targeted housing for an aging population, and increase the diversity of housing choices in the region. *(Read full initiative on page 35)*



★ **Priority Objective #2: Childcare objective: Increase Childcare capacity in Southeast Alaska**

Expanding childcare capacity in Southeast Alaska is essential for fostering a vibrant economy and attracting younger workers and families to the region. Addressing the current shortages in supply, affordability, and quality of childcare



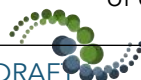
services requires a multifaceted approach prioritizing workforce development, sustainable funding, and operational support. *(Read full initiative on page 39)*

#3: Infrastructure maintenance

Maintaining existing infrastructure, better utilized underutilized State property and develop new critical infrastructure - especially marine infrastructure- within communities. Increase communication between State and community leaders to address deferred maintenance for facilities. Evaluation Co-op or collaborative opportunities for equipment sharing to reduce the cost of building or maintaining facilities. Develop post-pandemic project completion in next economic evaluation for better understanding of current actual construction costs. Maximizing funding opportunities and funding of multi-use, year-round infrastructure that can support economic diversification and bring new money into the state.

#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, carpentry, masonry, electrical, HVAC, 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. Partner with high schools in Southeast for new or expanded double credit opportunities. Retain students in state after graduation. Develop short courses to update skills in partnership with UAS and other post-secondary education institutions. 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: Workforce attraction and retention objective

Southeast Alaska has slowly but consistently been losing its workforce-age population. Support economic, cultural and quality of life projects that make Southeast a desirable place to live, work and plan. Help connect Alaskan college graduates with local, living wage jobs. Support housing initiatives to ensure communities have starter or attainable-priced homes for workforce age individuals.

#6: Coast Guard objective: Support Coast Guard vessel homeporting opportunities

Maintain and grow the Coast Guard presence in the region. The USCG is working to upgrade vessels as well as grow their northern-oriented fleet such as ice breakers. To support these new vessels, mooring and uplands space need updating. Support the infrastructure development needed to maintain and or grow USCG presence. Work with Federal representatives to forecast future force levels within communities. Identify challenges in supporting USCG growth and work to mitigate impacts. Support creating opportunities for ships and crews to overnight in the many ports across Alaska, allowing service members to better relate to the needs of the individual community and foster good working relationships with the local port authorities.



Objective #7: Natural disaster planning objective: Support disaster preparation and relief efforts

After 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. Increase resources for data collection and improve available basic local data for use in disaster preparation and response. Compile information and data of events and area terrain for better understanding and mapping. Partner with agencies to collect appropriate data to improve alert systems and other disaster response. Collect disaster impact information to improve understanding of direct and indirect effects of natural disasters on a community. 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. Prepare disaster mitigation systems. Increase collaboration and communication amongst organizations working to respond and prepare. Support implementing FEMA training throughout the state on an annual basis, prior to disasters.

#8: Solid waste objective: Support regional solid waste management solutions

Develop best practices solutions handling MSW, including baling and compacting solid waste for shipping. Increase utilization of regional recycling and composting programs and increase use of commercial burn units. Encourage businesses and entrepreneurs to find ways to reuse solid waste materials to keep them out of landfills or from being shipped out for final disposal. Raise awareness of upcycling opportunities with community art projects and outreach to the schools with creative competitions. Communicate the importance of waste sorting to citizens in communities that 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. Encourage collaboration and partnerships between communities and organizations to develop collective, regional programs and solutions.

#9: Healthcare workforce objective

There are too few Alaska healthcare workers to fill the current demand for services in Southeast Alaska, and job vacancies in the industry are increasing. Regional medical facilities must compete statewide and nationally for high demand healthcare workers. Look for creative solutions in finding different ways to recruit new talent. Continue recruitment partnerships with the university system, job center network, Alaska Department of Labor, and Alaska Workforce Investment Board. Expand local university programs to meet regional needs. Work to eliminate barriers to recruitment and retention through strategies that include establishing license reciprocity with other states. Work to retain Alaska-trained healthcare students. Increase health care training and support dual credits for high school and college training credits within the region and state. Reduce barriers to hiring outside workers. Improve recruitment strategies.



#10: Telecommunications 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 with a focus on businesses that have a duty to serve and requirement to provide services to Alaskan communities. Communications and reliable multi-point-of-failure pathways are attractive to investors, businesses, and families looking to stay connected. Equitable access to educational opportunities offer local, improved education



outcomes and workforce development. Look at a regional solution that maximizes the use of IJJA funding to benefit all communities and expand broadband infrastructure in Southeast Alaska to achieve 2.5GHz.

#11: Manufacturing objective: Promote regionally-manufactured local product

Promote regionally-manufactured, local products (art, seafood, beer, wood, ships, handicrafts, etc.). Develop marketing materials to market Southeast Alaska as a whole. Grow the presence, public awareness and use of programs intended to identify locally-crafted goods to shoppers and visitors. Partner with education institutes to establish professional development classes that can teach entrepreneurs how to connect to consumers and sustainable business development. Teach creators how to grow and support their business operations to reach markets, especially online. Develop opportunities within communities to share knowledge, and collectively achieve economies of scale to expand selling avenues. Explore new market opportunities and form partnerships that are targeted for locally-available markets and visitors. Look for ways to reduce costs to small businesses such as through cooperative purchasing and subsidy programs.

#12: 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. Build educational opportunities in schools and in communities for respectful wild food harvest skills learning based on shared values established by long-time Southeast Alaska harvesters.

Action Plan Part II: Priority Objective Descriptions & Evaluation Framework

Priority Objective #1

Support the Sustainable Development of Housing

Southeast is experiencing a well documented housing crisis in nearly every community. Insufficient housing stock, deteriorating housing quality, and high housing costs are a deterrent to economic growth, making it difficult to attract or retain employees in the region, and have been directly linked to population declines. Southeast business leaders call housing the top obstacle to economic development in the region, with 61% of business leaders saying it is critically important for their local community to focus on housing over the next five years.

Priority Description

Develop new housing stock, improve existing housing quality, build 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. Increase access to housing, including to low- and moderate-income housing, to create more livable, economically competitive, resilient communities. Work across the region to find ways to reduce the costs associated with land development and new housing construction. Southeast homes are the oldest in Alaska. Work to improve housing conditions in homes that are aging and have mold and rot issues. Create walkable housing opportunities so people can easily access stores, school and healthcare without having to own a vehicle. Support energy efficiency programs to reduce the cost of home heating and modernize Southeast Alaska's housing stock.

Outline of steps required for project to be completed and timeline

Regional land ownership and availability/inventory

study: Identify land suitable for housing development. Southeast's topography, geology, hydrology, and high percentage of land in federal ownership limit the supply of land that can be developed for housing.

- Conduct a regional inventory of land ownership, including federal, state, tribal, and private parcels. Identify land that could be used for housing development.
- Establish criteria/ranking for buildable land: Water/sewer, access, etc.
- Regional housing needs assessment: Map where housing is needed by type
- Map building land availability by community and ownership type.

- Evaluate land readiness for housing development, including potential partnerships, trades, or sales for affordable housing projects.
- Identify wetland areas and conditions of adjacent properties to assess infrastructure needs.
- Assess existing structures for renovation/repurposing opportunities.
- Collaborate with federal landowners to explore housing development on federal parcels.
- Study and mitigate infrastructure risk of from climate change. Climate change is impacting lands in communities - resulting in slides, floods, sinking land - creating new challenges to development and existing housing.

Timeline: 1-3 years for study completion.

Housing Incentive/Inducement Program: Encourage housing development through regional incentive programs. Research successful housing incentive programs and adapt them for Southeast Alaska. Collaborate with national forums to learn about innovative housing solutions. Develop public and private housing incentive packages.

Timeline: 1 year to design and years 2-5 to implement programs

Infrastructure Investment Partnerships: Build partnerships to finance infrastructure projects that support housing development. Develop a Regional Consolidated Infrastructure Needs Plan: Identify and prioritize regional infrastructure requirements, including roads, water, sewer, and utilities; Incorporate the plan into housing development strategies to ensure infrastructure aligns with future housing needs; Engage local governments, tribal entities, and other stakeholders to collaborate on the plan; Use the plan to guide funding applications and partnerships. Identify funding sources and establish partnerships with state, federal, and private stakeholders. Prioritize infrastructure investments based on housing project readiness.

Timeline: Short-Term (6–12 months): Complete the Regional Consolidated Infrastructure Needs Plan.

Medium-Term (1–3 years): Secure funding and begin infrastructure improvements.

Long-Term (3–5 years): Continue phased infrastructure development.

Develop manufactured model home for Southeast

Alaska: Create regionally appropriate manufactured housing options. Partner with HUD, International Building Code committee on Tribal Council, and Cold Climate Housing Research Center to develop wet climate housing models. Establish best practices for manufactured homes in Southeast Alaska. Pilot test homes and refine designs based on outcomes.

Timeline: 1-3 years to design and implement programs

Housing Quality Improvement Grants: Improve existing housing stock to address mold, rot, and weatherization issues. Develop a grant program for home repairs

(e.g., roofs, heat pumps, weatherization). Work with residential users to improve understanding of how a heat pump system may work in their homes, how it may integrate with an existing heating system, and how it may lower home heating costs. Educate existing heat pump users about routine maintenance and general system operations in order to optimize system performance and maximize useful life. Collaborate with regional and federal funding agencies to fund home quality improvements. Ensure homeowner awareness of financial assistance programs, program eligibility requirements, and opportunities to use funding from multiple sources. Timeline: 12 months to establish the program and ongoing implementation.

Title 16 Subdivision Code Revision: Streamline subdivision requirements to facilitate new housing development. Review and revise subdivision codes in consultation with local stakeholders. Align codes with regional housing priorities. Timeline: 1-5 years

Zoning Code Revisions: Increase flexibility in zoning regulations to support diverse housing options.

- Conduct regional zoning code reviews and identify barriers to housing development.
- Increase allowable density and streamline permitting processes.
- Expand areas allowing workforce housing, manufactured homes, and accessory dwelling units.

Timeline: 1-5 years

Construction workforce development: Build a skilled workforce for housing construction.

- Partner with schools and vocational programs to expand training opportunities.
- Offer partial wage-sharing incentives for on-the-job training.
- Support industry capacity building through contractor summits and training programs.
- Participate in the Alaska Construction Task Force.

Timeline: 1-5 years

Workforce housing development: Provide high-density housing for seasonal and short-term workers. Identify high-priority areas for workforce housing. Partner with employers to co-develop housing solutions. Ensure housing affordability and proximity to workplaces. Timeline: 12–24 months for planning and phased implementation.

Capacity development: Strengthen the regional construction industry to increase competitive bids and project success.

- Establish a Construction Pipeline: Map out a 10-year pipeline of expected construction projects to help local businesses prepare for upcoming opportunities. Distribute project timelines and RFP information regionally.
- Support Local Contractors: Organize regional contractor summits to share best practices, resources, and opportunities. Develop training programs on bid preparation, project management, and technical skills.
- Promote Larger Collaboration: Facilitate partnerships between local contractors and larger companies to

enhance capacity and competitiveness. Provide templates and workshops on setting up joint ventures.

- Simplify Bonding Processes: Collaborate with legal experts to educate contractors on bonding requirements and processes. Offer guidance on meeting bonding criteria for larger projects.
- Participate in Statewide Initiatives: Join the Alaska Construction Task Force to align regional strategies with statewide goals.

Timeline: Short-Term (6–12 months): Organize contractor summit and initial training sessions. Medium-Term (1–3 years): Launch collaboration initiatives and bonding workshops. Long-Term (3–5 years): Maintain a construction pipeline and sustain training programs.

People and Organizations responsible for completing these steps

- Tlingit Haida Regional Housing Authority
- Local governments
- Tribal governments
- Housing Providers
- State Finance Authority
- Federal Funders
- Local nonprofits, like the Juneau Non-Profit Housing Development Council
- Private Developers
- Juneau Non-Profit Housing Development Council

Funding Sources

Housing funding sources include the Alaska Housing Finance Corporation; Alaska Workforce Investment Board; CBJ Affordable Housing Fund; Community Development Block Grants (CDBG); congressional designation grants; Denali Commission; Department of Energy - alternative solutions; EPA; Federal Partnerships Programs; HUD; ICDBG; IHS; Indian Housing Plan - Competitive Grant Program; local government; Low-Income Housing Tax Credits (LIHTC); NAHASDA - Tribal Partners; private developers; unions; Rasmuson; regional economic development organizations; Rural Development; state and federal housing grants and land management programs; state housing agencies or nonprofit housing trusts; state revolving funds; trade associations and contractor groups; tribal government; U.S. Department of Energy (DOE); U.S. Department of Labor Workforce Innovation and Opportunity Act (WIOA); U.S. Economic Development Administration (EDA) grants; USDA Loan/Grant programs; USDA Rural Housing Service programs; and the Weatherization Assistance Program (WAP).

Cost Estimates

5-year Cost Estimates \$300 million

- **Regional Land Ownership and Availability/Inventory Study:** \$275,000–\$475,000
- **Housing Incentive Program:** \$13,000 to \$50,000 per dwelling unit added to the community. Target = 300 units annually region wide.
- **Infrastructure Investment Partnerships:** Regional Consolidated Infrastructure Needs Plan: \$500,000 for a comprehensive study. Implementation = \$10 million per borough/census area annually.

- **Manufactured Model Home Development:** \$150,000 for model code development; \$50,000 for best practices documentation and testing.
- **Housing Quality Improvement Grants:** \$60,000 – \$80,000 per unit; Target 1,000 units = \$70 million.
- **Title 16 Subdivision Code Revision:** \$125,000 – \$1 million per community (varies by community size).
- **Zoning Code Revisions:** \$250,000 – \$2 million per community (varies by community size).
- **Construction Workforce Development:** \$50,000 per person per year; Estimated \$1 million annually (for ~20 workers in training).
- **Workforce Housing Development:** \$5 million per borough/census area (varies based on scope).
- **Capacity Development:** \$50,000 annually for a regional contractor summit (rotating locations).

Evaluation Measures

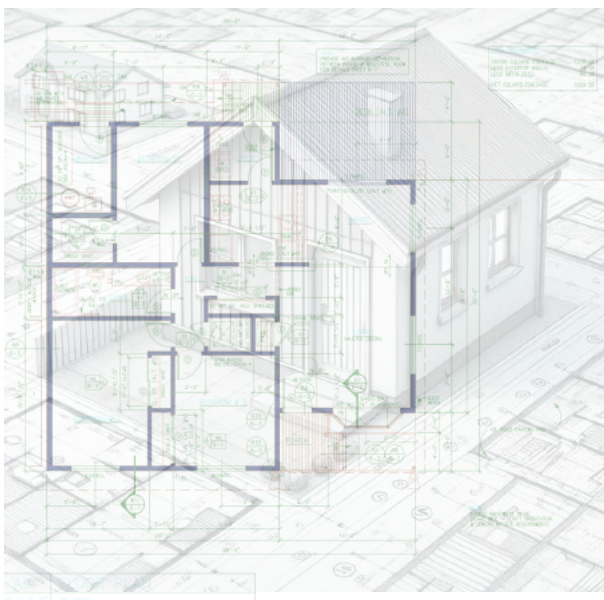
- Number of housing units constructed in Southeast Alaska each year
- Number of units improved
- Number of new workers trained
- Increase total residents in the region/communities
- Policy and code changes completed to support housing development.
- Formation of partnerships with private, public, and nonprofit entities for housing projects.
- Reduction in documented housing need as shown in surveys like the Annual Regional Business Climate Survey.

Project Champion

Name: **Jacqueline Kus.een Pata**

Title: **President/CEO**

Organization: **Tlingit Haida Regional Housing Authority**



Priority Objective #2

Support the stability, sustainability and longevity of the Marine Highway Systems of Alaska

Priority Description

With many geographically remote and isolated communities that cannot be connected via traditional roads, the Marine Highway Systems in Alaska must provide reliable, basic transportation service for passengers and freight to coastal communities, create an economy of scale, and provide cost effective transportation services. In a coordinated effort to restore, strengthen and expand critical service, investment is needed in a strategic, long-term and short-term plan that includes bridge capacity support through private sector transportation partnerships. Public and private collaboration can improve reliability, efficiency, affordability and stability. Pursue standardized and appropriately sized fleet and terminal modernizations that can be realistically and manageably staffed while meeting essential service needs with potential for economic growth to communities. Design the system for a smaller workforce and increased efficiency and automation, to mitigate impacts and constraints faced with limited available personnel. Develop targeted workforce development programs and a schedule for job consistency to reduce turnover. Advocate for State and Federal support of all system components. Strategically and expeditiously pursue and obligate PL 117-58 funds.

Outline of steps required for project to be completed and timeline

Grow a regionally based workforce (Years 1-3)

Work with partners to develop local training programs to help get Alaskans into good paying jobs quicker. Promote job fairs and industry interest events just as the “Experience Maritime” event, to highlight the benefits and potential Southeast Alaskan’s can find in the region’s Maritime industry. Support employee initiatives that encourage and allow residents to stay in their communities.

Evaluate economic opportunities for communities (Years 1-2)

As AMHS works towards increased and more reliable services, new opportunities may arise for Southeast communities onboard and shoreside. Assess existing regional and community assets and infrastructure. Review community results from SEC annual business climate survey and meet with the communities to better understand needs, challenges and desired potential opportunities. Assess how improved AMHS operations can increase trade, tourism, and accessibility for isolated communities. Identify opportunities to expand local product exports (e.g., seafood, crafts) using the transportation system. Work with private sector stakeholders to identify investment opportunities and

promote connections within the community to determine feasibility.

Outline last mile freight logistics (Year 2)

Work with communities and industry to develop system pathways and economics for last mile freight services using AMHS. Research opportunities for regional and community solutions that meet other regional goals including solid waste and food security.

Modernize fleet and AMHS docks (Years 1-5)

Advocate for State and Federal support of all system components. Strategically and expeditiously pursue and obligate PL 117-58 funds. Prioritize adoption and construction of a modernized fleet, capitalizing on federal funding opportunities and time limits. Develop partnerships to increase outreach and a better understanding of vessel needs and design. Work with communities to collaborate on port projects and terminal designs for increased asset capacity and shared use.

Support Implementation of the AMHS Long Range Plan (Years 1-5)

Develop a task force or project team that facilitates the implementation of the AMHS Long Range Plan. Support implementing the AMHS Long Range Plan and achieving plan goals. Organize plan action items into a timeline and identify partners and responsible parties for execution. Provide regular outreach to AMHS communities and Alaskans on progress and opportunities.

Support a financially stable system (Years 1-5)

Advocate the benefits of the AMHS system and a multi-year funding plan. Evaluate additional funding mechanisms and opportunities to increase system revenues. Support a farebox recovery goal and annual adjustment plan.

Continue to evaluate community impact of AMHS (Years 1-5)

The AMHS Long Range Plan provides the framework and roadmap for increased services to AMHS communities. To help publicize and improve system services, complete regular reviews on the social and economic impacts AMHS has on communities. Use the economic opportunities evaluation results as a baseline to track progress towards community goals. Ensure 2045 service level goals that were based on perceived community growth and demand remains realistic and appropriate as the AMHS Long Range Plan actions are implemented.

AMHS Value Outreach (Years 1-5)

Better communicate the value of the ferry system to the public using communication tools such as publications, letters, news stories, Facebook and website development. Provide regular outreach to AMHS communities and Alaskans on system updates and changes through participation in community, regional and statewide events. Maintain data on user type and traveler pathways to show broad system use and benefits to all Alaskans.

People and Organizations responsible for completing these steps

SEC Staff, SEC Transportation Committee, Alaska Marine Highway System, AKDOT&PF, Alaska Municipal League, Tlingit & Haida, Other ARDORS, University of Alaska, AMHS Maritime Unions (IBU, MMP, & MEBA), Coastal Alaska communities, Legislature, and private sector transportation partners.

Cost Estimates

5-year Cost Estimates \$1.1 Billion

Grow regionally based workforce \$250,000
Evaluate economics opportunities for communities \$150,000
Modernize fleet and AMHS docks \$1 Billion
Continuous evaluation of community impact \$250,000
Outline last mile freight logistics \$150,000
Outreach and Support for Actions \$375,000

Funding Sources

AMHS, MARAD (PIDP, US Marine Highway Program, America's Marine Highway Projects, Capital Construction Fund, META), FTA (Passenger Ferry Grant Program, Ferry Service for Rural Communities Program), FHWA, EPA (Clean Ports Program, DERA, Environmental Justice Grants, NCDC, Pollution Prevention Grant Program), DOE (Understanding Energy Transitions and Coastal Resilience in the Non-Contiguous areas of the U.S., USDOT (ATTAIN, NHFP, NHPP, RAISE, STBG, Electric or Low-Emitting Ferry Pilot Program, PROTECT, Rural, CFI, MPDG)

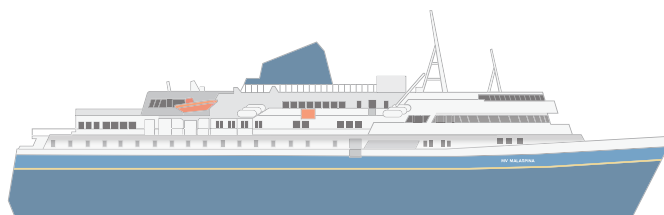
Evaluation Measures

What are the indicators we can track that will measure project success? Include a realistic time frame for execution (i.e., implementation schedule), with relevant benchmarks and performance measures that speak to overall impact.

- Southeast Conference meetings on AMHS Transportation.
- AMHS Ridership levels.
- AMHS employment levels and turnover rates.
- AMHS Farebox recovery improvements, revenues raised outside of farebox.
- Completion of action item deliverables
- Private sector investments, transportation service partnerships.

Project Champion

Name: **Robert Venables**
Title: **Executive Director**
Organization: **Southeast Conference**



Priority Objective #3

Increase Child Care Capacity in Southeast Alaska

Priority Description

Expanding childcare capacity in Southeast Alaska is essential for fostering a vibrant economy and attracting younger workers and families to the region. Addressing the current shortages in supply, affordability, and quality of childcare services requires a multifaceted approach prioritizing workforce development, sustainable funding, and operational support.

A critical component of enhancing childcare quality is developing a skilled workforce. Southeast communities should invest in and support their current and future childcare providers to enroll in the SEAAEYC apprenticeship program. Providing foundational early childhood education knowledge and on-the-job training can ensure high standards of care across the region. Investing in such initiatives is vital to building a pipeline of professionals capable of meeting the growing demand for childcare services.

The region should establish a pooled funding model to overcome the financial barriers associated with childcare businesses' high operational costs and low profit margins. This approach combines investments from state, local, and corporate partners to create a sustainable funding pool to support community-specific childcare initiatives. By aggregating resources, the pooled fund can provide both start-up and operational grants, incentivizing the establishment of new childcare businesses and sustaining existing ones. Such a funding structure ensures that childcare providers remain viable while offering affordable, high-quality care to families. Pooled funding models have been recognized in several states for enabling funding to be more strategic, equitable, and collaborative, as they bring together funders and civil society in equal measure to design and make decisions at every stage of the funding process.

The 2024 Southeast Alaska Business Climate Survey highlighted childcare availability, affordability, and quality as top priorities among 34% of the respondents. By tackling these challenges through workforce development, innovative funding mechanisms, and long-term policy support, Southeast Alaska can create a sustainable childcare ecosystem that strengthens families, supports economic growth, and enhances the region's appeal to young professionals.

Outline of steps required for project to be completed and timeline

Establish Regional Partnerships and Strategic Framework (2025)

- Convene key stakeholders, including local governments, tribal organizations, corporate investors, and community leaders, to define goals and align priorities.
- Formalize partnerships to manage the pooled funding model and childcare workforce development initiatives.

- Identify priority areas based on community needs and gaps in childcare capacity.

Launch the Pooled Funding Model (2025-2026)

- Secure commitments from state, local, and corporate contributors to establish the funding pool.
- Develop grant application guidelines and criteria for start-up and operational funding for childcare providers.
- Publicize the funding model and engage current and potential childcare providers and community organizations.

Expand Workforce Development Programs (2025-2027)

- Scale the apprenticeship program with SEAAEYC, incorporating advanced training modules and mentorship opportunities.
- Establish regional training hubs to provide accessible education and hands-on experience.
- Recruit participants, emphasizing outreach to underserved communities and non-traditional entrants into the childcare workforce.

Provide Financial Support for Childcare Providers (2026-2028)

- Award start-up grants to new childcare providers, prioritizing underserved areas and high-demand locations.
- Disburse operational grants to existing facilities to increase capacity and improve quality standards.
- Offer grant recipients technical assistance and financial management training to ensure long-term sustainability.

Enhance Childcare Infrastructure (2026-2029)

- Support the development and renovation of childcare facilities, incorporating energy-efficient and family-friendly designs.
- Foster partnerships with employers to create employer-supported childcare programs and facilities.
- Advocate for zoning and policy changes to streamline the establishment of childcare centers.

Monitor, Evaluate, and Scale Efforts (2028-2030)

- Conduct annual assessments of childcare capacity, affordability, and workforce readiness.
- Publish transparent reports to stakeholders, highlighting successes and areas for improvement.
- Use evaluation findings to refine the pooled funding model, workforce training programs, and operational strategies.
- Expand initiatives to new communities and sectors based on demonstrated need and effectiveness.

People and Organizations responsible for completing these steps

The successful implementation of these objectives will require collaboration among a wide array of partners, each bringing unique expertise and resources to address the childcare challenges in Southeast Alaska. Below is a roster of the key individuals, institutions, and partner organizations involved:

Southeast Alaska Association for the Education of Young Children (SEAAEYC): Lead the workforce development efforts through the apprenticeship program, provide technical assistance to childcare providers,

administer grants, and oversee quality improvement initiatives.

Economic Development Boards and Organizations: Advocate for pooled funding models, coordinate with corporate and public investors, and integrate childcare initiatives into broader economic strategies.

Chambers of Commerce and Rotary: Promote childcare as an essential component of workforce attraction and retention, connect businesses with opportunities for employer-supported childcare programs, and engage corporate partners in funding initiatives.

School Districts and Educational Institutions: Collaborate on dual-credit programs for high school students interested in early childhood education careers, provide facilities for training hubs, and support professional development efforts.

Municipal Governments: Facilitate zoning and regulatory changes, contribute to the pooled funding model, and prioritize childcare in local economic development plans.

State Agencies: Allocate state resources to support the pooled funding model, improve the regulatory process for current and potential providers

Corporate Partners and Philanthropic Organizations
Examples: Regional employers, Alaska Native corporations, and local philanthropic foundations, such as Juneau Community Foundation. **Role:** Contribute to the pooled funding model, support employer-sponsored childcare initiatives, and provide financial and in-kind resources for childcare facilities and programs.

Community Organizations and Nonprofits: Provide community outreach, connect families with childcare resources, and advocate for equitable access to high-quality childcare.

Childcare Providers and Head Start Organizations: Serve as the primary implementers of expanded childcare services, participate in apprenticeship and training programs, and collaborate with funders and policymakers to ensure service quality.

Alaska Native Tribal Organizations: Support culturally relevant childcare services, provide funding and resources, and advocate for Native children and families.

Cost Estimates

5-year Cost Estimates \$165 million

Start-Up Costs for 10-12 new child care businesses (Years 1-5): \$1,000,000 to \$1,200,000

Operational Grants (Annually): \$30,000,000

Apprenticeship Program (Annually): \$500,000

Funding Sources

The pooled funding model proposes that the total costs be shared equally among communities/municipalities, corporations, and the state government. The breakdown is as follows:

- Communities/Municipalities (1/3) \$10 million
- Corporations (1/3) \$10 million
- State Government (1/3) \$10 million

Potential Grant Opportunities

To supplement the pooled funding model, the following grant opportunities can be explored:

Federal Grants: Reallocation of the Child Care and Development Block Grant (CCDBG), DOL funding for apprenticeships

State Grants: The Child Care Grant Program housed at DOH, Workforce Development funds, Apprenticeship funds

Private Foundations: Organizations like the Rasmuson Foundation, the Juneau Community Foundation and the Alaska Community Foundation have a history of funding community development and education initiatives.

Corporate Sponsorships: Engaging local businesses and corporations in sponsorships or corporate social responsibility initiatives can provide additional funding and resources.

Evaluation Measures

To measure the success of the initiative to increase childcare capacity in Southeast Alaska, the following indicators, benchmarks, and performance measures will be tracked over the next five years:

- **Childcare Availability:** Increase in the number of licensed childcare slots across the region. Establish 10-12 new childcare businesses by the end of 2026.
- **Affordability:** Reduction in the percentage of families reporting childcare as a financial burden. Provide \$500 monthly operational grants per child to sustain services for at least 5,000 children.
- **Workforce Development:** Number of apprentices completing the childcare apprenticeship program. Train and graduate at least five new childcare providers annually, starting in 2025.
- **Quality of Care:** Percentage of childcare providers meeting established quality standards. 90% of grant-funded providers achieving high-quality care benchmarks by 2027.
- **Community Impact:** Retention and attraction of workforce-age families in the region. 10% increase in workforce-age families (20-50 years old) residing in Southeast Alaska by 2030.
- **Funding Efficiency:** Effective use and distribution of pooled funding model resources. Benchmark: Full disbursement of annual pooled funds (\$30.5M) with no significant delays or misallocations by 2026. Time Frame: Annual financial audits and performance reviews starting in 2025.
- **Stakeholder Engagement:** Participation levels of municipal, corporate, and state partners in funding and support roles. Benchmark: Maintain equal contributions from all funding sectors and expand partnerships annually. Time Frame: Stakeholder engagement assessments will be conducted biannually starting in 2025.

Project Champion

Name: **Blue Shabler**

Title: **Executive Director**

Organization: **Southeast Alaska Association for the Education of Young Children**

Priority Objective #4

Further Develop Markets for Alaska Seafood

Priority Description

Support marketing efforts to expand existing and develop new domestic and international markets for Alaska seafood. Additionally encourage efforts to develop new products and increase utilization, promote the origin and sustainability of Alaska seafood, guide research opportunities, and advance seafood friendly policies. Encourage partnerships and collaboration that showcase the Alaska brand and foster innovation. Better capitalize on the Alaska visitor industry by increasing marketing to visitors and leveraging partnerships with travel associations. Promote Alaska as a global leader in sustainable fisheries and encourage research that helps tell the Alaska origin story. Work to expand marketing opportunities by further developing promotional materials, guidance documents and tools for direct marketers, and educational materials for quality and handling procedures. Continue to support partnerships with federal agencies, including the U.S. Department of Agriculture (USDA), to strengthen the supply chain of local and regional seafood systems. Encourage the USDA to provide parity to U.S. and Alaska fishermen, processors, and businesses by having a seafood-focused office within the agency to support seafood products and companies as they do land-based proteins.

Outline of steps required for project to be completed and timeline

Increase U.S. Domestic Market Opportunities for Alaska Seafood Products (Years 1-5):

- Promote the utilization of the Alaska Seafood logo on packaging to increase recognition for the brand.
- Increase current partnerships and build new ones to host campaigns and promotions of Alaska products.
- Increase retail, foodservice and consumer marketing efforts of Alaska seafood in U.S. domestic market to capitalize on opportunity resulting from Russian seafood import ban.
- Continue and expand domestic consumer-focused efforts via traditional, social and other media to increase demand, awareness, and preference for Alaska seafood.
- Increase marketing to Alaska's visitors, utilizing partnership with Alaska Travel Industry Association (ATIA) and Cruise Line International Association (CLIA) membership to promote more opportunities with the Alaska visitor industry including serving more Alaska products onboard, providing educational and marketing materials, increasing visitor seafood consumption onboard and onshore, and partnering in marketing and promotional activities.
- Continue to collaborate with other organizations and their events.
- Promote products such



as black cod and pink salmon, which have been identified as key drivers of value and candidates for market expansion.

- Advance initiatives that would expand the use of Alaska seafood in institutional settings including, school lunch programs both within the region and across the nation.

Expand International Markets for Alaska Seafood Products (Years 1-5):

- Continue to grow and expand ASMI marketing programs in regions already demonstrating great success such as Southeast Asia and Latin America (LATAM). Continue expanding Alaska Seafood's reach by targeting new countries in established ASMI regional programs, such as the expansion to central Asia.
- Continue market diversification for Alaska seafood in new regions such as the Middle East, specifically the UAE, which presents an opportunity for higher-end Alaska seafood products suffering from a lack of diversification such as sablefish, king salmon, salmon roe, golden king crab and bairdi crab.
- Continue to develop reprocessing hubs internationally, in countries such as Peru, Ecuador, Vietnam, and Thailand and explore opportunities in North Africa such as Morocco.
- Increase and diversify marketing efforts and target audiences in established and new markets through innovative promotional partnerships and unique consumer marketing campaigns.
- Showcase Alaska and its seafood products through hosting inbound missions, culinary retreats, press tours, and other educational events for international trade and customers.
- Conduct outbound trade missions, once a year to introduce Alaska seafood exporters to new markets and help foster relationships between the Alaska seafood industry and international trade at least once per year.
- Educate hotel, restaurant and institution (HRI) and trade professionals about Alaska seafood through targeted educational seminars.
- Exhibit at leading trade shows around the world to identify and meet with new potential buyers and maintain relationships with trade, while obtaining trade leads to distribution to Alaska Seafood industry.

Support the Development of New Alaska Seafood Products and Increase Utilization (Years 1-5):

- Help Alaska seafood industry identify market gaps and opportunities through surveys, research, and other outreach promoting more value-added products with Alaska seafood.
- Provide research, technical and market information to support Alaska seafood industry in its efforts to fully utilize all parts of Alaska seafood species and resource.
- Identify key functional characteristics of species and match with existing products built on those characteristics (IE, what collagen-based products exist for species with high collagen).
- SWOT Analysis of potential new products, including feasibility analysis for relevant business models.
- Participate in pilot projects and field trials to develop new products, such as canned pollock.
- Encourage participation in Alaska Fisheries Development Foundation's Symphony of Seafoods and

seek to increase prestige and awareness of winning companies and products.

- Establish research and marketing opportunities for Alaska seafood byproducts used in the \$58.1 billion U.S. pet food industry.
- Increase collaboration between the mariculture sector and other seafood sectors to benefit the industry as a whole.

Promote Origin and Sustainability of Alaska Seafood (Years 1-5):

- Continue to promote the sustainability of Alaska seafood through Responsible Fisheries Management (RFM) and other certification, research, marketing materials, and public relations.
- Expand RFM and increase awareness of this globally-recognized certification that highlights the origin of seafood.
- Tell the story of how Alaska's fisheries are managed and promote Alaska as a global leader in sustainable fisheries.
- Explore new partnerships and promotions that showcase the Alaska story such as tribal partnerships, TV programs and others.
- Leverage mariculture marketing opportunities to help promote the sustainability of Alaskan produced products.

Expand Marketing, Educational, Technical, and Research Materials (Years 1-5):

- Expand research on carbon emission impacts of wild harvest fisheries.
- Develop additional guidance and tools to support harvesters that directly market their products.
- Elevate the health benefits of Alaska seafood through supporting new research and showcasing past studies that demonstrate positive impacts and the nutritional value of Alaska Seafood.
- Prioritization of quality and handling materials for seafood producers including developing materials that would assist processors trying to get third-party quality certifications.
- Fund domestic and international consumer research to track retail and foodservice trends, consumer preference toward Alaska seafood, establish primary and secondary audiences, understand regional variances, and identify marketing opportunities.

Promote Seafood Friendly Policies (Years 1-5):

- Strengthen ASMI and the Alaska seafood industry's relationship with USDA food aid program to increase and improve timing of USDA buys
- Advocate Farm Bill changes to establish a seafood liaison position within the USDA to provide fair program support to and serve the unique needs of the seafood industry.
- Encourage additional federal funding to support new product development, and promotion and marketing of U.S and Alaska seafood.
- Continue to advocate for federal policies that prioritize the purchase of U.S. and Alaska certified sustainable seafood.
- Actively pursue additional grant opportunities for the Alaska seafood industry and help enable Alaska

harvesters and processors to take advantage of federal, state, and private funding opportunities.

- Support policies that lead to trade policy reciprocity, supply chain traceability, and reduce barriers to trade.
- Advocate to fully fund the Saltonstall-Kennedy Grant program and direct the funding to promote U.S. seafood - ensuring Alaska gets its fair share.
- Explore the formation of a Regional Seafood Development Association in Southeast Alaska.
- Advocate for state policies that continue to strengthen the Alaska seafood industry at all levels from harvesting to processing to marketing.

People and Organizations responsible for completing these steps

- Alaska Seafood Marketing Institute – Greg Smith
- Southeast Conference
- Alaska Fisheries Development Foundation – Kristy Clement, CEO
- Alaska Sea Grant - specific research priorities & funding
- Pacific Seafood Processors Association – Julie Decker, Executive Director
- Alaska Research Consortium
- Alaska Longline Fishermen's Association
- Southeast Alaska Fisherman's Alliance

Cost Estimates

5-year Cost Estimates - \$222.5 million

- Grow U.S. domestic demand and sales - \$200 million
- Expanding programs in SE Asia and LATAM - \$10 million
- Building new trade program in MENAWA – \$3.5 million
- Conduct yearly trade missions to new markets – \$350,000 (per year)
- Host domestic and international customers in Alaska - \$350,000 (per year)
- Funding new studies - \$3 million
- Development of new marketing materials - \$1 million
- Promote Origin and Sustainability of Alaska Seafood - \$1 million
- Development of quality handling materials for third-party certifications – \$500,000

Evaluation Measures

- Increase in exports to target markets
- Total number of trade missions conducted in foreign countries with tracked 12-month sales projections from industry participants
- Participation in trade shows and the acquisition of trade leads
- Number of customer and trade trips to Alaska
- Brand recognition and preference data
- Increase in products featuring Alaska Seafood and/or RFM logo
- Consumer impressions on social and other media
- Increase in seafood byproduct utilization

Project Co-Champions

Name: **Jeremy Woodrow**
Title: **Executive Director**
Organization: **Alaska Seafood Marketing Institute**

Name: **Robert Venables**
Title: **Executive Director**
Organization: **Southeast Conference**

Priority Objective #5

Support local tourism ownership and entrepreneurship

Priority Description

By fostering local ownership and entrepreneurship, the visitor industry can create sustainable economic opportunities, enhance cultural preservation, promote environmental stewardship, and help ensure long-term prosperity in the region. Success requires a holistic approach, ensuring residents have the knowledge, resources, and access needed to develop and expand tourism businesses. Strategies will empower local entrepreneurs by building skills in business development, management, financing, and marketing that are tailored to Southeast Alaska.

Outline of steps required for project to be completed and timeline

Provide Business Training and Support (Years 1-5)

Work with existing and prospective entrepreneurs to identify opportunities and create successful businesses. Partner with education organizations, business support groups and economic development organizations to offer affordable and accessible professional development programs that empower local entrepreneurs to be successful businesses. Ensure curriculum offerings meet the wide array of business skills needed for success including assessing financial needs for start-up and ongoing operations, management, human resources, research, and marketing. Develop ongoing training and networking forums to increase partnerships, cultural awareness, community engagement, and access to capital. Offer "level-up" mentoring and training to existing businesses seeking expansion and growth.

Support a Regionwide Destination Marketing Organization (Years 1-5)

Revitalize Southeast Alaska Tourism Council (SATC) or create a new cooperative marketing organization that complements existing programs in promoting Southeast Alaska as a visitor destination, increases awareness of the region's diverse experiences, and stimulates visitor growth. Devise appropriate marketing strategies, funding mechanisms, and tracking needed to illustrate return on investment.

Develop Partnerships to Expand Access and Awareness (Years 1-3)

Develop partnerships and working groups to collaborate in program development and grassroots efforts. Identify partner platforms to host cooperative services and forums for success in the region. Establish a program outline on how local businesses can collaborate to create cost effective marketing campaigns, and cost effective training programs and resources. Increase awareness amongst Southeast Alaska residents and entrepreneurs of programs and professional development training opportunities. Promote and enhance channels to provide information to Southeast entrepreneurs.

Expand Tourism Research Availability and Usage (Years 1-5)

Develop in-depth tourism market research and data collection tools to help visitor-focused businesses better understand local and regional tourism markets, respond to opportunities, and refine business offerings. Publish visitation trends and projections for each community annually, including segmentation by cruise, air, and ferry. Develop an ongoing data collection program that captures travel patterns, spending, satisfaction ratings, and topical issues. Help businesses understand how to utilize existing research, collect information from current and prospective guests, and identify needs to ensure businesses are providing relevant services to visitors.

Increase Promotion and Purchasing of Locally Made Products (Years 1-5)

Increase purchasing from local businesses, building on existing branding programs including Buy Alaska, Made in Alaska, Alaska Grown, and Silver Hand. Encourage business awareness of program resources. Provide staff training and incentives to build employees' knowledge and sales. Increase promotion of locally produced products in in statewide and regional marketing programs to create informed shoppers.

People and Organizations responsible for completing these steps

University of Alaska Southeast (UAS); Spruce Root; Economic Development Organizations; Destination Marketing Organizations including community-based entities, Southeast Alaska Tourism Council (SATC), and Alaska Travel Industry Association (ATIA); Municipalities; Local and Regional Tribal Organizations; State of Alaska; Southeast Conference; SEATrails; SEC Tourism Committee; Southeast Sustainable Partnership; Generations Southeast; and AKSBDC.

Funding Sources

Leverage current offerings from the partner organizations above.

Cost Estimates

5-year Cost Estimates \$2.6 million

- Provide Business Training and Support: \$100,000 annually
- Support Regional Destination Marketing: \$50,000 annually
- Tourism Research and Analysis: \$150,000 annually
- Increase Promotion of Locally Made Programs: \$20,000 annually
- Support: \$200,000 annually for staffing, activities, and capacity.

Evaluation Measures

- Southeast visitor industry jobs and wages (tracked annually)
- Visitor volume and trends (tracked annually)
- Tourism Business Climate (annual business climate survey)

Project Champion

Name: **Susan Bell**

Title: **VP Strategic Initiatives**

Organization: **Huna Totem**

Priority Objective #6

Reduce energy costs and increase deployment of renewables

Priority Description

Encourage and facilitate public/private partnerships that connect utilities, technology providers, and other energy companies with local, state, Tribal and federal agencies to advocate for renewable energy development that reduces cost and creates community resiliency. Continue to pursue opportunities for increased efficiency in the generation, transmission, and distribution of electricity, as well as in energy consumption for buildings, vehicles, marine transportation, and aviation. Educate and communicate the value and importance of priority regional energy projects, especially small, community-based projects. Facilitate technical expertise, support local workforce development, and educate consumers regarding energy use. Explore opportunities for research and development in the region, such as opportunities to implement technologies that increase utilization of renewable energy, which may include battery storage, demand control technologies, electric vehicle supply equipment, etc., and support the development of innovative business models to make these technologies successful in rural communities.

Outline of steps required for project to be completed and timeline

2025 Southeast Alaska Integrated Resource Plan (SEIRP) (Years 1-3) Develop a range of future energy demand scenarios for each community or energy market in the region and identify the programs and capital projects necessary to meet existing need and anticipated changes in energy consumption in a manner that balances short-term costs and long-term energy cost escalation. Programs and investments explored may include but are not limited to beneficial electrification, transmission and distribution infrastructure investments, and development of new generation resources. Plan will prioritize increasing utilization of renewable energy sources. Identify regulatory and policy barriers that require reform/updates.

Promote public/private partnership (Years 1-5) Identify sources of private capital. Support establishment and use of State and regional financial institutions for project development and financing of renewable resources and energy efficiency measures. Identify public projects/issues that could be addressed via private investment.

Financial modeling (Year 1) Identify opportunities where support is needed for refinancing/restructuring utility debt with an end goal of producing more affordable rates. Could be tied into SEIRP-25. Determine how much of each utility's cost can be "avoided" or "reduced," and how. Differentiate between unavoidable costs that cannot realistically be expected to decrease. Use this as a basis for resource planning/policymaker education/planning.

Promote energy efficiency (Years 1-3) Develop "Energy Use Best Practices for Southeast Alaska" report, identifying measures that optimize utility system performance and customer savings. Integrate opportunities for rate design to encourage consumer behaviors that optimize utility system performance. Develop outreach materials and conduct educational initiatives.

Pursue beneficial electrification opportunities (Years 1-5) Support heat pump deployment throughout Southeast and coastal Alaska in a manner that is compatible with the serving utility, promotes lower energy costs, and provides residents with low-income access to low-cost heat. Develop and deliver beneficial electrification consumer education initiatives. Encourage community/state fleet electrification plans (marine and rolling stock) for formal adoption/implementation. Collaborate with federal agencies to facilitate beneficial electrification initiatives that increase their use of heat pumps and EVs. (US Postal Service, US Forest Service, National Park Service, etc.) Establish 2-3 public chargers per community.

Community-scale energy projects to support port electrification (Years 1-3) Conduct community port electrification studies, integrating supply-side improvements and requirements (BESS, grid upgrades, transmission upgrades, etc.).

Technical expertise and workforce development (Years 1-2) Poll energy sector employers to identify in-demand positions and skillsets (e.g., linemen, accounting, customer service, engineering, managerial skills soft skills). Encourage development of career pathway blueprints for in-demand positions. Work with employers to create "Clean Southeast Alaska Jobs" marketing campaign designed to recruit skilled energy professionals to Southeast communities. Encourage Southeast students to choose energy sector career pathways.

Consumer and community education (Years 1-2) Work with utilities and community partners to educate consumers regarding creative use of specialized rate structures (e.g., APC time of use rates, IPEC declining block rates).

Explore R&D opportunities (Years 1-5) Identify technologies of interest for trial in Southeast (e.g., electric aircraft, non-lightwater nuclear, hydrogen production/cogeneration, marine hydrokinetic, nano scale hydro). Propose incentive mechanisms or CVC (corporate venture capital) to help match/attract VC investment in Southeast demonstration projects. Consider Hawaiian Electric model of rate-recoverable "innovation" expense. Encourage pre-commercial technology companies to demonstrate innovative technological projects in the region.

Inform Regulatory and Policy Updates (Years 1-5) Preserve and protect the Power Cost Equalization (PCE) Endowment program. Work to secure funding for the Renewable Energy Fund.

People and Organizations responsible for completing these steps

- Southeast Conference Energy Team
- Consulting Economists
- Tribal and ANC partners
- Alaska Heat Smart board, leadership, and staff
- Public and private utilities – KPU, SEAPA, AP&T, IPEC, AEL&P, MP&L, AVEC, Sitka Electric, others
- Energy-focused non-profit organizations
- Sources of capital (e.g., Spruce Root, Alaska Sustainable Energy Corporation)

Cost Estimates

5-year Cost Estimates \$3.4 million (plus \$38.6 million heat pump grant)

- Develop SEIRP-25: \$500K-\$1 million
- Financial modeling: \$100,000
- Promote energy efficiency: \$150,000
- Pursue beneficial electrification opportunities: \$40 million
- Support community-scale energy projects to support port electrification: \$350,000
- Technical expertise and workforce development: \$325,000
- Consumer and community education: \$150,000
- Explore R&D opportunities: \$150,000

Evaluation Measures

- Amount and source of capital deployed into new projects
- Energy costs (pre-PCE)
- SEIRP-25 – Number/diversity of entities participating in the SEIRP-25 process. Timely completion of report. Community energy profiles and resource/opportunity prioritization.
- Consumer and community education - Number of consumers contacted/events conducted.
- Bid-ready construction documents for port electrification
- Number of heat pumps deployed
- Number of EVs and EV infrastructure deployed
- R&D demonstration projects identified for
- Workforce development – improvement to utility vacancy factors, number of contractors trained

Project Champion

Name: **Jason Custer**

Title: **Vice President, Corporate Development**

Organization: **Alaska Power & Telephone Company**

Priority Objective #7

Seafood Modernization

Priority Description

The seafood industry is a cornerstone of Southeast Alaska's economy, culture, and identity. To ensure its longevity and resilience over the next century, the industry must adapt to evolving economic, environmental, and technological landscapes. The **Seafood Modernization Initiative**, led by the Alaska Fisheries Development Foundation (AFDF), provides a comprehensive framework to revitalize the industry, support economic well-being in coastal communities, and ensure long-term sustainability for Alaska's fisheries. This initiative addresses critical economic challenges impacting processors, harvesters, and local communities due to the ongoing seafood market crisis. Its core objectives are to **Enhance Local Infrastructure and Onshore Operations** by modernizing processing facilities, upgrading cold storage facilities, and investing in energy-efficient technology to reduce operational costs. **Expand and Diversify Markets** by opening new pathways for Alaska seafood in global markets, while emphasizing value-added products and innovation. **Foster Maritime Job Growth** by creating career opportunities within the industry, with a focus on workforce development, succession planning, and supporting rural community employment. **Promote Sustainable Practices** by leveraging advanced technologies and data-driven approaches to improve sustainability and operational efficiency, ensuring resource viability for future generations.

By streamlining operations, reducing costs, and leveraging partnerships, this initiative will not only address immediate economic hardships but also build a resilient, adaptive seafood industry capable of thriving in changing global markets. The **Seafood Modernization Initiative** fosters innovation, economic diversification, and community resilience, while safeguarding one of Alaska's most vital industries.

Outline of steps required for project to be completed and timeline

Data Analysis to Better Inform Decision-Making and Advocacy (Years 1-2)

- Conduct a comprehensive state-wide economic study to identify critical areas of concern and economic pain points within the fishing industry involving seafood processors, harvesters, and other stakeholders. Compile and synthesize findings into a comprehensive report with strategic recommendations to address statewide and regional needs.
- Promote studies that evaluate operational costs and look for ways to generate more efficiencies including energy use and costs.
- Integrate additional economic and market information produced by ASMI's annual economic report and NOAA's National Seafood Strategy to complement efforts.

- Formulate strategic recommendations to address statewide and regional needs and to improve resilience in the harvesting and processing sectors.
- Implement a robust framework to monitor and report progress on outcomes and make data-driven adjustments to ensure continuous improvement and alignment with economic goals.
- Conduct review of State and Federal policies and promote policy change that reduce barriers and increase opportunities.

Maximize Economic Benefits through Value-Added Seafood Product Development (Years 1-5)

- Enhance seafood quality by supporting seafood handling and processing training courses and helping industry obtain third party quality certifications.
- Partner with UAF & Kodiak Seafood Science Center to innovate culinary applications and create new products from low-value or side-stream materials.
- Research seafood development best practices in Arctic region countries to incorporate sustainable and innovative methods into Alaska’s seafood modernization plan, ensuring we leverage existing knowledge.
- Analyze food and market trends to guide new seafood product development; collaborate with ASMI to ensure complementary efforts.
- Conduct product development seminars and workshops tailored to industry needs.
- Expand the Alaska Symphony of Seafood to promote innovative Alaska seafood product development.
- Research and product development for non-food products, referencing the pyramid of products.

Increase Innovation (Years 3-5)

- Integrate cutting-edge technologies to optimize harvesting, processing, and distribution operations and increase efficiencies.
- Facilitate energy efficiency improvements and decarbonization initiatives for harvesters and processors alike, that strive to cut-costs, promote sustainability, and build resiliency.
- Establish priority research categories based on industry needs identified through data analysis.
- Foster strong partnerships in the industry through building joint innovation programs that increase collaboration.
- Facilitate a transparent RFP process to fund research proposals aligned with industry priorities.
- Disseminate research findings through digital platforms and public events to maximize impacts.

Accelerate the Adoption of Innovations through the AFDF Startup Accelerator. (Years 3-5)

- Support early-stage blue economy companies with specialized training and advising programs aligned with priorities identified in comprehensive study.
- Identify areas for blue capital investment to promote business development in processing and harvesting sectors.
- Organize reverse pitches to align entrepreneurial efforts with industry needs.

Increased Skilled Trades through a Partnership Program (Years 1-5)

- Assess and enhance education and training programs to meet evolving workforce demands across the seafood industry.
- Invest in workforce development initiatives to expand employment in fishing communities, stimulating economic growth, and increase Alaskan participation in fisheries and seafood processing.
- Foster expansion and growth of young fisherman’s initiatives to address the “graying of the fleet”
- Develop a Seafood Processor Career Academy with a career ladder approach, including management and leadership training. Continue to build upon the efforts of the Kodiak Seafood Marine Science Center (KSMSC), a seafood training and research hub.
- Expand on existing industry financing by increasing scholarship program to match funds using Technical Vocational Education Program and other funds as well as explore opportunities to provide loan/financing support for fishermen.
- Develop specialized training programs in fisheries research, enhancement, and management.
- Incorporate seafood careers in Career Clusters used by Career Technical Education (CTE) providers to expose youth to career opportunities in the seafood industry.

Expand Awareness and Sales of Alaska Seafood (Years 1-5)

- Establish a Retail Partnership Program
- Collaborate with Alaska Seafood Marketing Institute (ASMI), Genuine Alaska Pollock Producers Association (GAPP), Bristol Bay Regional Seafood Development Association (BBRSDA), Wild Alaska Sole Association (WASA), and other key stakeholders to identify a target list of retailers for new Retail Partnership Program (RPP)
- Develop a program strategy, including cost/benefit for retailer participation, pitch materials, and scheduled meetings.
- Utilize the Alaska Symphony of Seafood (ASOS) as a platform to promote innovative Alaska seafood products in retail markets.
- Support entrepreneurs in developing innovative, value-added Alaska seafood products.
- Establish strategic partnerships with key events, trade shows, and industry partners to enhance market visibility.
- Capitalize on TV viewership and film opportunities to promote beyond the catch awareness.
- Work to expand the definition of seafood to ensure efforts are inclusive of fish, shellfish, mariculture products, and other existing or emerging products and innovations within the seafood industry.

Build Alaska as a Global Standard of Excellence in Sustainability (Years 1-5)

- Embrace innovative, science-based strategies that drive sustainability, enhance resource efficiency, and prepare for the challenges of a changing environment.
- Streamline the sustainability certification process for Alaska fisheries and work towards a single entity to handle all certifications that would result in cost savings, more efficient processes, and add collective value.
- Advance climate-ready fishing technologies and practices through fostering innovation and enabling research.
- Uphold and strengthen Alaska as a global leader in sustainable fisheries management through promoting the Alaska fisheries management story.
- Develop a unified strategy to address environmental concerns and promote further sustainable economic development for the seafood industry.
- Work towards ecosystem modeling that helps reduce uncertainty and risk in the industry and can attract more investment.

Provide Education, Outreach, and Advocacy regarding the Seafood Modernization Initiative. (Years 1-5)

- Develop a comprehensive funding strategy that leverages diverse public and private funding sources to maximize the initiative's impact and longevity.
- Engage policymakers to advocate for supportive policies and funding at state and federal levels to ensure industry competitiveness.
- Coordinate statewide efforts to oversee and manage all aspects of the initiative to ensure seamless execution and measurable impact across Alaska's seafood industry.
- Promote and integrate best practices from other leading seafood-producing regions globally, incorporating innovative and sustainable methods to enhance Alaska's seafood industry.
- Showcase Alaska's leadership in sustainability by developing materials that highlight its sustainable practices and advancements.

People and Organizations responsible for completing these steps

- Alaska Fisheries Development Foundation – Kristy Clement, CEO
- Pacific Seafood Processors Association – Julie Decker, Executive Director
- Alaska Seafood Marketing Institute – Jeremy Woodrow, Executive Director
- Alaska Research Consortium
- Alaska Sea Grant
- Alaska Longline Fisheries Association – Linda Behnken, Executive Director
- Alaska Sustainable Fisheries Trust
- UAS (Juneau) -fisheries training/education, networking
- SE AK municipalities, State of Alaska
- Southeast Conference
- University of Alaska Fairbanks
- Kodiak Seafood Science Center

Cost Estimates

5-year Cost Estimates \$44.5 million

- Conduct comprehensive studies on processing and harvesting needs/gaps: \$500,000
- Other research and data analysis 500,000
- Expansion of the Symphony of Seafood program: \$3.5 million
- Conduct product development seminars and culinary development: \$1 million
- Funding for selected innovation projects: \$25 million
- Increase scholarship funds for workforce development opportunities: \$5 million
- Data, education, marketing and Retail Partnership Program Development: \$2 million
- Workforce development needs: develop a workforce education / recruiting event; training program updates; host training events: \$2 million
- Build Alaska as a Global Standard of Excellence in Sustainability: \$3 million
- Facilitate energy efficiency upgrades through research and upgrades: \$2 million

Evaluation Measures

- Change in industry business confidence – as measured annually in the Southeast Alaska Business Climate Survey
- Increased economic value of seafood sector in Alaska
- Increase in ex-vessel value
- Increase in Alaskan resident participation in fisheries (permit holders, crew licenses, processing jobs)
- Number of value-added products produced in state.
- Number of employees working in seafood industry.
- Number of new innovations funded.
- Reduced seafood waste
- Number of energy efficiency upgrades
- Engagement in project from industry members and stakeholders

Project Champion

Name: **Kristy Clement**

Title: **CEO**

Organization: **Alaska Fisheries Development Foundation (AFDF)**



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Tracy Martin St.Phillips
Dan Ortiz, Alaska Legislature, *Representative*

Appendices

Available at www.seconference.org/strategy/

Southeast Alaska by the Numbers (2012 to 2024)

Southeast Alaska Business Climate Survey Analysis (2015 to 2024)

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

Southeast Conference Board of Directors and Membership Roster

**Prior Comprehensive Economic Development Strategy 5 Year Plan & Updates
(2006-2025)**

