

Southeast Alaska Comprehensive Economic Development Strategy (CEDS)

2012 UPDATE

2011 - 2015 FIVE YEAR PLAN

JUNE 30, 2013

Prepared for

*United States Department of Commerce Economic Development
Administration*

Prepared by



Est.1958

Southeast Conference



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The purpose of a Comprehensive Economic Development Strategy (CEDS) is to initiate and sustain a local planning and implementation process by which jobs are created, more stable and diversified economies are fostered, and living conditions are improved. A CEDS is a mechanism for coordinating economic development activities and is a valuable tool for bringing focus to the planning and development efforts of these unique and diverse communities throughout the region. It is designed to respond to the economic problems of Southeast Alaska. A full menu of action initiatives for the Southeast Alaska 2011-2015 CEDS plan is presented in the complete document found at www.seconference.org. This document is the work that resulted from a regional collaboration and process involving the private sector.

This CEDS 2012 update has been prepared, in part, to meet a prerequisite for continued designation as an Economic Development District (EDD). EDD designation is necessary in order to qualify for Economic Development Administration (EDA) assistance under its public works, economic adjustment and planning programs. The 23 incorporated and 21 unincorporated communities included in this regional plan are also eligible to seek funding under the EDD designation for projects that are within the parameters of the goals and objective of this update.

The preparation of this CEDS update has been again undertaken as a joint project of Southeast Conference (SEC) and Central Council Tlingit and Haida Indian Tribes of Alaska (CCTHITA). The requirements of our respective economic development programs stipulate our participation in, and the production of, a regional economic development plan for Southeast Alaska. It was agreed that our region, our constituencies, and our organizations are best served by cooperating in the production of a single document. Although the CEDS has been jointly produced, each organization is individually responsible for the preparation of its own annual work plan for achieving mutual objectives and for evaluating and reporting progress in the CEDS updates.

In-so-far-as the Southeast Conference is the designated Alaska Regional Development Organization (ARDOR) for Southeast; this CEDS update has been prepared to fulfill the requirements for preparation of an ARDOR Regional Development Strategy.

Economic Development District Strategic Committee Roster 2012/2013

GOVERNMENT REPRESENTATIVES		
Name	Organization	Position
PUBLIC OFFICIALS		
Mayors of Southeast Alaska reviewed this document		
Merrill Sanford	City & Borough of Juneau	Mayor
Dianne Blumer	Office of Governor	Special Assistant
COMMUNITY LEADERS		
Gary Williams	Organized Village of Kake	Manager
Leo Luczak	City of Petersburg	Community Dev./SEC Board
Tim Rooney	City of Wrangell	City Manager/SEC Board
Jim Dinley	City of Sitka	City Manager/SEC Board
Mary Becker	City and Borough of Juneau	Assembly
NON-GOVERNMENT REPRESENTATIVES		
REPRESENTATIVES OF WORKFORCE DEVELOPMENT BOARDS		
Doug Ward	Alaska Workforce Investment Board	Director
Charles Edwardson	Alaska Workforce Investment Board	Director/SEC Board
Michelle Zenger	Alaska Workforce Investment Board	Director
REPRESENTATIVES OF INSTITUTIONS OF HIGHER EDUCATION		
Mike Bell	University of Alaska Southeast	Instructor/SEC Board
Rick Caulfield	University of Alaska Southeast	Provost
Wendy Gierard	University of Alaska Southeast	Workforce Development
Sheryl Weinberg	Southeast Regional Resource Center	Administrator
MINORITY AND LABOR GROUPS		
Mike Bavard	IBEW Local 1547	Business Manager
Max Mielke	Plumbers & Pipefitters Local 282	Business Manager
Cory Baxter	IUOE Local 302	District Representative
Patricia Phillips	Pacific Fishing Inc.	Owner/SEC Board
Owen Graham	Alaska Forest Association	Executive Director
TRIBAL REPRESENTATIVES		
Carrie Sykes	CCTHITA	Economic Development
Stephanie Rainwater	CCTHITA	Economic Development, Staff
Richard Peterson	CCTHITA	Council Member/SEC Board
PRIVATE INDIVIDUALS & COMPANIES		
Lori Blood	Alaska Communications Systems	Exec Acct Mgr/SEC Board
Bryce Dahlstrom	Viking Lumber	Vice President/SEC Board
Tory Korn	Alaska Rainforest Sanctuary & Alaska Canopy	General Manager/SEC Board
Gordy Wrobel	Cove Lodge	Owner/SEC Board
Bob Anderson	First Bank	President
ECONOMIC DEVELOPMENT AGENCIES		
Brian Holst	Juneau Economic Development	Executive Director
Garry White	Sitka Economic Development	Executive Director
Carol Rushmore	Wrangell Economic Development	Director
Liz Cabrera	Petersburg Economic Development	Director
Julie Cozzie	Haines Economic Development	Director
BOARDS AND COMMISSIONS		
Southeast Alaska Regional Fisheries Dive Association		Kate Sullivan
Southeast Alaska Regional Solid Waste Authority		Karl Hagerman
Southeast Alaska Fisherman's Alliance		Kathy Hansen
Juneau Economic Development Council		Brian Holst
Alaska Fisheries Development Foundation, Inc.		Julie Decker

SCOPE OF WORK FY 2014

Southeast Energy Development

Implement Regional Integrated Resources Energy Plan

Support Biomass Energy Demand Development in Southeast Alaska

Conduct Market-driven Renewable Energy Economic Modeling for Southeast Alaska, including Multiple Transmission and Energy Storage Strategies

Maritime Industry and Workforce Development

Strengthen the Region wide Mariculture Industry through support to entrepreneurs.

- a) Assist State of Alaska with development of loan program for mariculture farmers
- b) Work with the State of Alaska to create a mariculture advisory board.

Help rural communities identify and maximize local maritime assets, and connect to regional opportunities and self-identified clusters that demonstrate high-growth potential.

- a) Assist in the development of a website and educate businesses about this tool

Work with Central Council Tlingit Haida Indian Tribes of Alaska and other communities in southeast in further education on sea otter manufacturing, business regulation, and business planning.

Ensure Southeast's Fishing Future through Targeted Education & Training

- a) Offer at least 3 scholarships to students interested in attending UAS in fisheries classes.
- b) Continue to work with UAS on the statewide Fisheries, Seafood & Maritime Initiative
- c) Support efforts to create a sufficient regional workforce to meet industry needs
- d) Meet quarterly with training facilities to coordinate the opportunities offered, making sure all the industries are represented and industry needs are being met.

Southeast Alaska Forest Products Action Initiatives

Alternative Tongass Conservation Strategy

- a) Develop an alternative strategy to double the jobs in the timber industry. Work with government agencies both state and federal to adopt this strategy.

Conduct a Timber Threshold Analysis to Determine the Volume of Young Growth and Old Growth Supply Available for Sustaining and Strengthening the Forest Industry in Southeast Alaska

Begin implementation of the communications, education, and outreach plan for promoting the forest products and timber industry in Southeast Alaska.

CEDS Steering Committee Action Initiatives

Expand Telemedicine

Expand Research & Development in Southeast

Support transportation projects

Analyzing the Regional Economy

Finalize and release publication: "Southeast Alaska by the Numbers 2013." Develop presentation.

Continue efforts on the Southeast Economic Model Project.

- a) Have presentation at the Annual Meeting.

Update CEDS and continue to work on CEDS activities.

Community and Regional Development Planning:

a. Work jointly with Central Council Tlingit Haida Indian Tribes of Alaska to update and implement the Comprehensive Economic Development Strategy for the Southeast Region Plan and conduct 2 regional conferences;

Work with the Alaska Economic Development Representative.

Detailed schedule to set the baseline for evaluating the CEDS performance

2013 Month	Action
June	Submit final EDA Performance Report for FY2012, and the 2013 CEDS Update
August	Planning and preparation for Annual Meeting.
September	Convene Annual Membership Meeting
January	Submit mid- point EDA Performance Report for FY2013
February	CEDS Committee will meet and will review the current CEDS. This process may result in the revision, elimination, or addition of action initiatives. Any changes will be included in the CEDS and reported to EDA.
February, March, April, May, June	<p>There will be quarterly meetings for each committee or strategic project groups closely associated with CEDS action initiatives, including the following:</p> <ul style="list-style-type: none"> • Southeast Seafood Industry/cluster • Maritime Industry and Workforce Development Industry/cluster • Southeast Timber Industry/cluster • Southeast Energy Industry/cluster • Transportation Industry/cluster • Workforce Education Partnership • Research & Development <p>The progress made in these meetings will permit us to report on the following:</p> <ul style="list-style-type: none"> • Number of Significant Meetings on Strategic Projects • Number of Major Accomplishments on Strategic Projects/Objectives
May	<p>The Census of Employment and Wages—will be released in May 2014 which will allow Southeast Conference to extract the following information to measure performance and progress in the following categories:</p> <ul style="list-style-type: none"> • Total Employment • Total New Jobs • Total Jobs Retained • Total Businesses • Averages Annual Wages • Total Wages
June	In June, Southeast Conference will measure Total New Business Licenses in Southeast Alaska.
February through June	Southeast Conference will administer another Southeast Alaska Private Investment Survey in order to measure additional new investment in the region. This year, we will begin the process at our Mid-Session Summit event. The survey will be on-line and will run through June. It will be for July 2013 through June 2014.

4.3.3 2013 Southeast Alaska Comprehensive Economic Development Strategy Performance Measures Summary Report

Analysis of 2013 Southeast Alaska Comprehensive Economic Development Strategy (CEDS) performance measures shows that significant progress has occurred in almost every area during the reporting period (July 2012 through June 2013). The Southeast Alaska CEDS is well on its way to meeting the 2015 targets established in the Five-Year CEDS. The CEDS tracks metrics for 42 Southeast Conference regional action initiatives. The following pages provide one-page overviews for each strategic project or sector area.

Southeast Conference used 2009 as the baseline data year. Between 2009 and 2012, total jobs and total wages have increased in every one of sectors being tracked by the CEDS, including of 439 regional jobs.

Between 2011 and 2012, the private sector in Southeast Alaska grew by 566 annual average jobs all together, including 268 jobs in the visitor industry, 125 jobs in the seafood sector (excluding commercial fishing)¹, 75 jobs in transportation, and 15 jobs in energy. Not all areas tracked by the Southeast Alaska CEDS showed growth in the past year—timber and research jobs fell by 5% and 6% respectively. Despite job losses, total and average wages grew in both of these sectors. Telecommunications, and food system employment remained flat over this one-year period. In Southeast Alaska as a whole, total private sector wages increased by 6% percent, and average annual private wages increased by 4% percent over the past year. Since 2009 total private sector wages increased by 16% overall in Southeast (11% in CEDS areas) and average annual wages increased by 10% overall (and 7% in CEDS areas).

According to the 2013 Southeast Conference Annual Private Investment Survey, between \$50.3 million to \$115.8 million in private investments were made in Southeast Alaska during the 12 months between July 1, 2012 through June 30, 2013.² Additionally, USDA budgeted an investment of \$34.1 million dollars for FY12 and FY13 (October 2011 through September 2013) into the following four sectors in Southeast Alaska: Ocean Products, Energy, Visitor Products, and Forest Products.³

In the first two years of the five-year CEDS period, 245 meetings were held to move forward the 42 strategic projects/goals presented in the Southeast Alaska CEDS and 129 actions were either completed or significant accomplishments were made in respect to those items. As expected, some strategic projects have made more progress in moving towards the 2015 CEDS goals than others. Southeast Conference will increase its focus on goals where less progress has been made in FY13, and remove initiatives without sufficient support. The economic vision held by Southeast Conference and Central Council of the Tlingit and Haida Indian Tribes of Alaska (Central Council) in developing the goals and objectives of this Southeast Alaska CEDS have benefited from the cooperation and shared economic development priorities with other parties, such as the State of Alaska, the USDA, the University of Southeast Alaska, the Juneau Economic Development Council, and other regional economic development organizations. Through collaboration the efforts of many organizations to grow the economy of Southeast Alaska—especially in the areas of seafood, tourism, timber, and energy—are integrated into the CEDS and this Southeast Alaska CEDS performance report.

¹ Since commercial fishing earnings and employment levels are not reported by employers, but by individual fishermen, there is a year lag time on this data. The latest data we have is for 2011.

² This is a measure of what is reported by survey respondents only, not a regional total. See the description of this survey in 4.3.1 Performance Measure Descriptions for more information.

³ USDA Investment Strategy in Support of Rural Communities in Southeast Alaska 2011-2013. November 2011.

Summary Data for CEDS

Performance Measures for Southeast Alaska Private Sector, 2009 to 2012

	2009 (Baseline)	2010	2011	2012	Change 2009- 2012	Goal by 2015
Total Private Employment (monthly avg.)	22,914	23,097	23,621	24,187	+6%	23,600 to 24,060 (17,259 to 17,645 in CEDS areas)
Total New Private Jobs in Southeast Alaska		+183	+524	+566	+1,273 new private jobs in SE; +570 new jobs in CEDS areas	340 to 700 new jobs in CEDS areas
Total Jobs Retained		100%	100%	100%	100%	100% of jobs in SE
Total Private Sector Businesses	2,737	2,708	2,740	2,758	100% +21 new employers	90% - 100% retained in SE
Total Wages (mill\$)	\$795.4	\$824.0	\$867.0	\$922.4	+16%	Increase of 7-9%
Average Annual Wages	\$34,711	\$35,673	\$36,706	\$38,136	+10%	Increase of 7-9%

Sources: Alaska Department of Labor and Workforce Development, Research and Analysis section. Special reports by A. Abrahamson 2009-2012.

Note: Self-employment data are not captured in this data.

Additional Performance Measure	FY2011	FY2012	Goal by 2015
Total USDA Investment	\$153.5 million (2009-2011)	\$34.1 million (FY2012-2013 planned)	na
Private Investment (Survey responses, not regional total)	\$98.5 to \$134 million	\$50.3 million to \$115.8 million	\$200 million to \$300 million (\$38 to \$100 million in CEDS areas)
Total Business Licenses (establishing baseline and goal required metric of 2012)	7,474 (May 2012 snapshot)	8,487 (May 2013 snapshot) +13.5%	Increase of 1-3% over total
Number of Significant Actions on Action Initiatives	83	50	69 to 163
Number of Significant Meetings on Action Initiatives	123	124	133 to 153 meetings

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results 2012 and 2013. Interviews with action initiative champions. JEDC Southeast Cluster Initiative Annual Summary Report, 2011& 2012. USDA Supports Economic Development in Southeast Alaska, Issue Paper Feb. 2012. USDA Investment Strategy in Support of Rural Communities in Southeast Alaska 2011-2013. Alaska Corporations, Business & Licensing Database May 2012, May 2013.

Note: "Total Private Sector Businesses" is a count by ADOL of businesses with employees. "Total Business Licenses" is a count of all active business licenses, including proprietors and the self-employed.

Southeast Alaska Seafood Sector

Strategic Projects/Goals

Performance Measures for SE Alaska Ocean Products Private Sector, 2009 to 2012

	2009 (Baseline)	2010	2011	2012	Change 2009-2011	Goal by 2015
Commercial Fishermen	2,336	2,341	2,330	na*	0%	2,406 to 2,453 jobs
Other Private Employment (monthly avg.)	1,951	2,025	2,003	2,151	10% (’09-’12)	1,809 to 1,848 jobs
Total Employment	4,287	4,366	4,333	na*	1%	4,215 to 4,301 jobs
Total New Jobs		79	-33	na*	46	125-210 new jobs
Total Jobs Retained		100%	99%+	100%*	100%	100% of jobs
Total Private Sector Businesses	129	135	134	123	-6 (’09-’12)	90% - 100% of Businesses
Total Wages (mill\$)	\$244.49	\$285.13	\$264.42	*na	8%	Increase of 3-5%
Average Annual Wages	\$57,031	\$65,307	\$61,024	*na	7%	Increase of 3-5%

Sources: Alaska Department of Labor and Workforce Development, Research and Analysis section. Quarterly Census on Employment and Wages. Special reports by A. Abrahamson 2009-2012. Fish Harvesting Employment by Month. Southeast Region Seafood Industry, Harvesting Workers and Gross Earnings.

Notes: Ocean Products “cluster” includes: Commercial fishing, Animal aquaculture, Fishing, Seafood product preparation and packaging, Fish and seafood merchant wholesalers, Ship and Boat Building, Boat dealers, Marine cargo handling, Navigational services to shipping, and Marinas. (Self-employment—other than commercial fishermen—are not captured in this data).

* Commercial fishing earnings and employment data are not yet available for 2012.

Performance Measure	FY2011	FY2012	Goal by 2015
Total USDA Investment	\$21,074,506 FY2009-2011	\$6,478,000 planned FY12-13	na
Private Investment (Survey responses, not regional total)	\$3.7 to \$17 million	\$8.5 to \$26 million	\$15 million to \$50 million
Total Business Licenses	264 (May 2012)	63 (new licenses June 2012 – May 2013)	Increase of 1-3% over total
Number of Significant Actions on Action Initiatives	29	9	20 to 45
Number of Significant Meetings on Action Initiatives	17	9	15 to 20

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results 2012 and 2013. Interviews with Julie Decker (Ocean Products Sector Lead). JEDC Southeast Cluster Initiative Annual Summary Report, 2011; 2012 SE AK Cluster Initiative Annual Summary Report, 2012. USDA Supports Economic Development in Southeast Alaska, Issue Paper Feb. 2012. Alaska Corporations, Business & Licensing Database May 2012, May 2013.

Survey includes investments in: improvements to commercial fishing business, developing industrial harbor and marina, expansion and improvements to infrastructure of salmon hatchery, two 58 foot purse seiners purchase, new construction, rebuilt vessel, continuing maintenance of a fishing operation, upgrading oyster farm, staffing, training, transportation, equipment, dock repairs, waste reclamation, new processing equipment, generators, Development of a Maritime Industrial situation in Ward Cove Alaska, Increased productivity of marine infrastructure supporting shipbuilding and repair in the marine transportation sector.

Note: “Total Private Sector Businesses” is a count by ADOL of businesses with employees. “Total Business Licenses” is a count of all active business licenses, including proprietors and the self-employed.

Southeast Alaska Visitor Sector

Strategic Projects/Goals

Performance Measures for SE Alaska Visitor Products Private Sector, 2009 to 2012

	2009 (Baseline)	2010	2011	2012	Change 2009- 2012	Goal by 2015
Total Employment (monthly avg.)	5,728	5,518	5,569	5,837	+2%	5,778 to 5,838 jobs
Total New Jobs	--	-210	51	+268	+109 jobs	+50 to 110 new jobs
Total Jobs Retained	--	96%	100%	100%	100%	100% of jobs
Total Private Sector Businesses	692	674	675	688	-4%	90% - 100% of businesses retained
Total Wages (mill\$)	\$134.8	\$132.8	\$138.2	\$145.9	+8%	Increase of 3-5%
Average Annual Wages	\$23,539	\$24,062	\$24,809	\$24,990	+6%	Increase of 3-5%

Sources: Alaska Department of Labor and Workforce Development, Research and Analysis section. Quarterly Census on Employment and Wages. Special reports by A. Abrahamson 2009-2012.

Notes: Visitor Products "cluster" includes: Jewelry stores; Gift, novelty, and souvenir stores; Art dealers; Air transportation; Scenic and sightseeing transportation; Passenger car rental; Leisure and Hospitality; Inland water passenger transportation; Charter bus industry; Recreational goods rental; Travel agencies; and Tour operators.

Note: Self-employment data are not captured in this data.

Performance Measure	FY2011	FY2012	Goal by 2015
Total USDA Investment	\$25,333,600 actual FY09-11	1,912,000 planned FY12-13	na
Private Investment (Survey responses, not regional total)	\$2.2 million to \$2.3 million	\$1.9 million to \$3.7 million	\$5 million to \$10 million
Total Business Licenses	1,620 (May 2012)	238 (new licenses May 2012 – May 2013)	Increase of 1-3% over total
Number of Significant Actions on Action Initiatives	21	12	10 to 28
Number of Significant Meetings on Action Initiatives	22	12	15 to 20

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results 2012 and 2013. JEDC Southeast Cluster Initiative Annual Summary Report, 2011; 2012 SE AK Cluster Initiative Annual Summary Report, 2012. USDA Supports Economic Development in Southeast Alaska, Issue Paper Feb. 2012. Alaska Corporations, Business & Licensing Database May 2012, May 2013.

Survey includes investments in: Perseverance Theatre, Tenakee Springs Bathhouse, Fleenor Sawmill, Wrangell Golf Course, State Fairgrounds, Sealaska Heritage Center, Chief Shakes House, upgrading of the facilities, improvement & expansion of tourism facilities, maintenance on existing building, purchased a building lot, staffing, training, transportation, equipment, etc.

Note: "Total Private Sector Businesses" is a count by ADOL of businesses with employees. "Total Business Licenses" is a count of all active business licenses, including proprietors and the self-employed.

Southeast Alaska Timber Sector

Strategic Projects/Goals

Performance Measures for SE Alaska Forest Products Private Sector, 2009 to 2012

	2009 (Baseline)	2010	2011	2012	Change 2009- 2012	Goal by 2015
Total Employment (monthly avg.)	295	328	348	332	+13%	315 to 405
Total New Jobs	--	+33	+20	-16	+37	20-110 new jobs
Total Jobs Retained	--	295	100%	95%	100%	100% of jobs
Total Private Sector Businesses	41	41	35	35	-15%	90% - 100% of businesses
Total Wages (mill\$)	\$14.2	\$15.2	\$16.8	\$17.2	+21%	Increase of 3-5%
Average Annual Wages	\$48,238	\$46,449	\$48,324	\$51,887	+8%	Increase of 3-5%

Sources: Alaska Department of Labor and Workforce Development, Research and Analysis section. Quarterly Census on Employment and Wages. Special reports by A. Abrahamson 2009-2012.

Note: Forest Products "cluster" includes: Forestry and logging, Support activities for forestry, Wood product manufacturing, Wood kitchen cabinet and countertop mfg., Non-upholstered wood household furniture mfg., Lumber and const. supply merchant wholesalers, Other heavy machinery rental and leasing.

Note: While some forestry employment exists outside these jobs categories (just as road building) they cannot be tracked as timber jobs without an in-depth study, which could not be readily duplicated on an annual basis. Self-employment data are not captured in this data.

Performance Measure	FY2011	FY2012	Goal by 2015
Total USDA Investment	\$23,545,163 actual FY09-11	\$24,967,000 planned FY12-13	na
Private Investment (Survey responses, not regional total)	\$500,000 to \$1,000,000	\$252,000 to \$302,000	\$2 million to \$6 million
Total Business Licenses	111 (May 2012)	40 (new licenses June 2012 – May 2013)	Increase of 1-3% over total
Number of Significant Actions on Action Initiatives	10	3	10 to 35
Number of Significant Meetings on Action Initiatives	19	26	15 to 20

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results 2012 and 2013. JEDC Southeast Cluster Initiative Annual Summary Report, 2011. USDA Supports Economic Development in Southeast Alaska, Issue Paper Feb. 2012. Alaska Corporations, Business & Licensing Database May 2012, May 2013.

Survey includes investments in: Developing abandoned pulp mill, creating more covered work production areas, improving working conditions for employees, R&D and equipment for production of musical instruments from local wood, Staffing, training, transportation, equipment.

Note: "Total Private Sector Businesses" is a count by ADOL of businesses with employees. "Total Business Licenses" is a count of all active business licenses, including proprietors and the self-employed.

Southeast Alaska Energy Sector

Strategic Projects/Goals

Performance Measures for the Southeast Alaska Energy Private Sector, 2009 to 2012

	2009 (Baseline)	2010	2011	2012	Change 2009- 2012	Goal by 2015
Total Employment (monthly avg.)	395	439	428	425	+7%	405 to 445 jobs
Total New Jobs	--	44	-11	-3	+30	+10-50 new jobs
Total Jobs Retained	--	100%	97%			100% of jobs
Total Private Sector Businesses	36	39	39	39	100%	90% - 100% of businesses
Total Wages (mill\$)	\$19.5	\$17.1	\$20.0	\$21.2	+10%	Increase of 3-5%
Average Annual Wages	\$49,329	\$39,044	\$46,713	\$49,824	+1%	Increase of 1-3%
Net generation of MWh in Southeast	397,457	379,578	408,469	--	+3% (change '09-'11)	To be determined

Sources: Alaska Department of Labor and Workforce Development, Research and Analysis section. Quarterly Census on Employment and Wages. Special reports by A. Abrahamson 2009-2012. Annual Electric Power Industry Report. U.S. Energy Information Administration <http://www.eia.gov/cneaf/electricity/page/eia861.html> (Net Generation is gross generation minus plant use from all electric utility owned plants).

Note: Energy "cluster" includes: Power generation and supply; Fuel dealers; Other petroleum merchant wholesalers; Power and communication system construction; Elec. equip. & wiring merchant wholesalers; Petroleum bulk stations and terminals. 18 jobs in this "cluster" are local government.

Note: Self-employment data are not captured in this data.

Additional Performance Measure	FY11	FY12	Goal by 2015
Total USDA Investment	\$4,242,203	\$728,000	na
Private Investment (Survey responses, not regional total)	\$1.7 million to \$7 million	\$1.4 million to \$5.8 million	\$5 million to \$10 million
Total Business Licenses	47 (May 2012)	3 (new licenses June 2012 – May 2013)	Increase of 1-3% over total
Number of Significant Actions on Action Initiatives	4	2	5 to 10
Number of Significant Meetings on Action Initiatives	15	19	15 to 20

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results 2012 and 2013. Southeast Alaska Energy Coordinator Robert Venables. JEDC Southeast Cluster Initiative Annual Summary Report, 2011; 2012 SE AK Cluster Initiative Annual Summary Report, 2012. USDA Supports Economic Development in Southeast Alaska, Issue Paper Feb. 2012. Alaska Corporations, Business & Licensing Database May 2012, May 2013.

Survey includes investments in: Electric system capacity upgrades such as a new distribution feeder, Electric system reliability such as new avalanche diverters to protect transmission line structures or a new transmission line to provide an alternative service to Substation, Electric services to new residential and commercial buildings, Improvements to generating equipment such as new relays and penstock valves, Hydropower Development

Note: "Total Private Sector Businesses" is a count by ADOL of businesses with employees. "Total Business Licenses" is a count of all active business licenses, including proprietors and the self-employed.

Expand Research and Development

Strategic Project/Goal

Performance Measures for Private Research and Development Jobs, 2009 to 2012

	2009 (Baseline)	2010	2011	2012	Change 2009-2012	Goal by 2015
Scientific research and development services (monthly avg.)	13	36	54	51	+106%	33 to 43 jobs
Total New Jobs		+23	+18	-3	+38 jobs	+20 to 30 new jobs
Total Jobs Retained		100%	100%	94%	100%	100% of 2009 jobs
Total Private Sector Businesses	7	9	7	8	100%	90% - 100% retained
Total Wages (millions)	\$0.5	\$1.2	\$1.5	\$1.8	+244%	Increase of 3-5%
Average Annual Wages	\$39,433	\$33,720	\$27,026	\$34,545	-12%	Increase of 1-3%
University of Alaska SE Research Funding (non-general funds)	\$1,277,400	\$972,900	\$707,000	\$890,900	-30%	Increase of 3 to 5%
Total Scientists (includes State, excludes Federal) (monthly avg.)	827	731	777	--	-50 (change '09-11)	NA

Sources: Alaska Department of Labor and Workforce Development, Research and Analysis section. Quarterly Census on Employment and Wages. Special reports by A. Abrahamson 2009-2012. UA in Review 2012 & 2013.

Note: For "Expand Research and Development" only private sector jobs in Scientific Research and Development Services (NAICS 5417) are being tracked. While "Total Scientists" (tracked using SOC codes) is not required to be tracked for the CEDS, it helps paint the larger picture regarding scientists in the region. *Change 2009-2011 as 2012 data was not yet available for this report.

Note: Self-employment data are not captured in this data.

Additional Performance Measure	FY2011	FY2012	Goal by 2015
Private Investment (Survey responses, not regional total)	\$55,000 to \$60,000	\$152,000 to \$202,000	\$500 K to \$1 million
Total Business Licenses (establishing baseline and goal required metric of 2012)	20 (May 2012)	4 (new licenses June 2012 – May 2013)	Increase of 1-3% over total
Number of Significant Actions on Action Initiatives	1	1	3 to 5
Number of Significant Meetings on Action Initiatives	2	1	4

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results 2012 and 2013. USDA Supports Economic Development in Southeast Alaska, Issue Paper Feb. 2012. Alaska Corporations, Business & Licensing Database May 2012, May 2013.

Note: "Total Private Sector Businesses" is a count by ADOL of businesses with employees. "Total Business Licenses" is a count of all active business licenses, including proprietors and the self-employed.

Develop Rural Broadband

Strategic Project/Goal

Performance Measures for Developing Develop Rural Broadband, 2009 to 2012

	2010 (Baseline)	2011	2012	Change 2010-2012	Goal by 2015
Total SE telecommunications jobs (monthly avg.)	144	143	148	+3%	149 to 154 jobs
Total New Jobs		-1	+5	+4	+5 to 10 new jobs
Total Jobs Retained		99%	100%	100%	100% of 2009 jobs
Total Private Sector Businesses	22	22	23	100%	90% - 100% retained
Total Wages (mill\$)	\$9.8	\$10.1	\$10.5	+8%	Increase of 3-5%
Average Annual Wages	\$67,856	\$70,505	\$71,306	+5%	Increase of 3-5%

Source: Alaska Department of Labor and Workforce Development, Research and Analysis section. Quarterly Census on Employment and Wages. Special reports by A. Abrahamson 2009-2012.

Note: Due to a non-economic code change, 2009 data in this category is cannot be compared to 2010 and 2011.

Note: Self-employment data are not captured in this data.

Per the CEDS action initiative, the Strategic Southeast Alaska Broadband implementation Plan was completed. Phase two of this initiative is on hold, and efforts have been shifted and combined with the Expand Telemedicine action initiative pilot project (see next) as the communications access to new communities would both expand broadband and expand telemedicine capability through a new pilot project.

Additional Performance Measure	FY 2012	FY 2013	Goal by 2015
New Private Investment for IT, Broadband and/or communications	\$100K to \$500K	\$1.06 million to \$1.13 million	\$2 million to \$3 million
Number of Communities with High Speed Access	Communities Served 24 Fiber Broadband Available 1 Cable Broadband Available 8 DSL Broadband Available 15 Fixed Wireless Broadband Available 3 Mobile Wireless Broadband Available 17 Unserved communities 13	Communities served 24 Unserved communities include: Yakutat Kake, Coffman Cove, Pelican, Naukati Bay, Tenakee Springs, Hyder, Port Protection, Port Alexander, Whale Pass, Elfin Cove, Point Baker, and Excursion Inlet	Broadband transmission services installed in 5 currently unserved areas; or increase speed of services in existing communities; or lower cost per data transfer in selected communities.
Number of Significant Actions on Action Initiatives	4 (Strategic Plan completed)	0 (shifted efforts to focus on Expand Telemedicine)	3 to 6
Number of Significant Meetings on Action Initiatives	30+	0	5

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results. Alaska Corporations, Business & Licensing Database May 2012 & 2013. CCTHITA Southeast Alaska Broadband Strategic Plan, October 2011. Connect Alaska connectak.org (http://www.connectak.org/mapping/interactive_map_interface/?q=map)

Expand Telemedicine

Strategic Project/Goal

The goals set forth by the initial Expand Telemedicine action initiative were mostly completed in the CEDS reporting period (July 2012 through June 2013). A second phase of this project has begun: Development of a pilot project that will begin the process to bring connectivity and telemedicine capability to five unserved Southeast Alaska communities. This project arises out of partnership between with the State of Alaska, Health & Social Services, Veteran’s Administration, Universal Services Administration Company (FCC div.); **Communities:** Elfin Cove, Tenakee Springs, Coffman Cove, Naukati, Gustavus; Health care providers: Juneau Alliance for Mental Health (JAMHI), Alaska Island Community Services (AICS); **Service Providers:** Alaska Power and telephone (AP&T), American Telephone and Telegraph (AT&T), Alaska Communications (ACS); and a grant from the Rural Veterans Health Access Program.

This telehealth pilot project should be completed by September 2013. The pilot project will then be assessed to determine if the project will be expanded to other unserved communities. The project serves two purposes: setting up the framework for internet connectivity and telehealth access. Service providers will build out the “middle mile” and the next step is for business to build out last mile.

Performance Measures for Expanding Telemedicine

Additional Performance Measure	FY 2012	FY2013	Goal by 2015
Number of communities with telemedicine access	<u>16 communities</u> Angoon, Craig, Haines, Hoonah, Hydaburg, Juneau, Kake, Kasaan, Ketchikan, Klawock , Klukwan, Pelican, Petersburg, Sitka, Skagway, Wrangell	16 communities <u>5 community pilot project</u> Coffman Cove, Elfin Cove, Gustavus, Naukati, Tenakee Springs	20-25 communities
Number of Significant Actions on Action Initiatives	0	4	2 to 4
Number of Significant Meetings on Action Initiatives	0	62	4
Investment	Public investment \$1.14 million		

Sources: Southeast Conference. Personal Communications Tracy Speier, MPA, Health and Social Service Planner II State of Alaska; Lori Blood, Client Account Manager at Alaska Communications.

Enhance Senior Care Services

Strategic Project/Goal

Performance Measures for Development of Enhance Senior Care Services

Additional Performance Measure	FY 2012	FY 2013	Goal by 2015
Private Investment	Most senior care is paid for by Medicaid. Federal, state, and local grants and contracts also help pay for senior care in Southeast. A very small portion of operating expenses are paid by the recipients of care or private insurance.		--
Total Business Licenses (establishing baseline and goal required metric of 2012)	360 (May 2012)	57 (new licenses June 2012 – May 2013)	Increase of 1 to 3%
Communities with Senior Services	Senior Apts: 12 Communities Senior Centers: 12 Communities Senior Meals: 14 Communities Senior Van: 14 Communities Home Based Services: 14 Communities Hospice: 4 Communities Adult Day Care: 2 Communities Assisted Living: 5 Communities Nursing Homes: 5 Communities	Levels retained	Retain current levels
Number of Senior Rides	84,000	65,141	Retain current levels
Number of Significant Actions on Action Initiatives	0	0	3 to 5
Number of Significant Meetings on Action Initiatives	0	0	5

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results 2012 and 2013. Alaska Corporations, Business & Licensing Database May 2012, May 2013. Personal Communications Marianne Mills Program Director Southeast Senior Services. Elder Care Needs Assessment Conducted by Southeast Alaska Regional Health Consortium 2008.

Notes: Business Licenses include: Offices of physicians; Offices of dentists; Offices of chiropractors; Offices of optometrists; Offices of mental health practitioners; Offices of physical, occupational and speech therapists, and audiologists; Offices of podiatrists; Offices of all other miscellaneous health practitioners; Outpatient mental health and substance abuse centers; All other outpatient care centers; Medical laboratories; Home health care services; All other miscellaneous ambulatory health care services; General medical and surgical hospitals; Nursing care facilities; Residential mental retardation facilities; Homes for the elderly; Other residential care facilities; Services for the elderly and persons with disabilities; Other individual and family services; Other community housing services; Emergency and other relief services; Vocational rehabilitation services, Other social advocacy organizations; Civic and social organizations; Administration of public health programs.

Develop Southeast Solid Waste Authority

Strategic Project/Goal

The Southeast Alaska Solid Waste Authority (SEASWA) is working with Republic Services/Allied Waste to provide a solid waste disposal system to the region and to expand their current solid waste shipping contracts in Southeast Alaska. SEASWA is focusing on the promotion and implementation of trans shipping of solid waste and recyclable materials, there is no physical “project” to build at this point. Republic Services is working with four SEASWA communities (Petersburg, Wrangell, Thorne Bay and Klawock) and will supply containers to the communities for the loading and shipping of waste and recycles. The shipping method requires investment by the member communities (fees for shipping and disposal of their communities waste). The infrastructure is in place to ship waste for all communities except Thorne Bay and they have begun experimentation on how they can load containers in the most efficient manner. Other SEASWA communities will be contracting for their waste disposal with one of the four contracting members. Most likely, Kasaan and Coffman Cove will contract with Thorne Bay and Hydaburg and Craig will contract with Klawock.

Performance Measures for Development of Solid Waste Authority

Additional Performance Measure	FY 2012	FY 2013	Goal by 2015
Private Investment (Survey responses, not regional total)	\$500,001 to \$1,000,000 was invested in solid waste improvements regionally	\$250K to \$300K was invested in solid waste improvements regionally	\$3 million to \$5 million
Total Business Licenses (establishing baseline and goal required metric of 2012)	24 waste related	2 (new licenses June 2012 – May 2013)	Increase of 1-3% over total
Total Employment	1	No new employment	TBA
Total Authority Members	7 members Petersburg, Wrangell, Craig and Thorne Bay joined in 2009. Klawock joined in 2010. Kasaan and Coffman Cove joined in 2011.	8 members Hydaburg joined in 2012.	11-13 members (4 to 6 new members)
Number of Significant Actions on Action Initiatives	3	1	3 to 6
Number of Significant Meetings on Action Initiatives	12	13	30

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results. Alaska Corporations, Business & Licensing Database May 2012. Personal Communications Southeast Alaska Solid Waste Authority Board of Directors Chair Karl Hagerman.

Note: Business licenses include NAICS 562: Waste Management and Remediation Services: waste collection, waste treatment and disposal, and remediation and other waste management.

Develop Stronger Regional Food Systems

Strategic Project/Goal

Performance Measures for Developing Stronger Regional Food Systems, 2009 to 2012

	2009 (Baseline)	2010	2011	2012	Change 2009- 2012	Goal by 2015
Total SE private food jobs (monthly avg.)	4,314	4,402	4,414	4,407	+2%	4,364 to 4,414 jobs
Food Manufacturing	1,407	1,459	1,627	1,602	+13%	--
Total New Jobs		+88	+12	-7	+93	+50 to 100 new jobs
Total Jobs Retained		100%	100%	100%	100%	100% of 2009 jobs
Total Private Sector Businesses	305	309	276	276	91%	90% - 100% retained
Total Wages (mill\$)	\$106.7	\$113.8	\$123.8	\$121.1	+13%	Increase of 3-5%
Average Annual Wages	\$24,720	\$25,856	\$27,996	\$27,488	+11%	Increase of 3-5%

Sources: Alaska Department of Labor and Workforce Development, Research and Analysis section. Quarterly Census on Employment and Wages. Special reports by A. Abrahamson 2009-2012.

Note: Food Sector includes: Crop production; Animal production; Fishing, hunting and trapping; Food manufacturing; Beverage manufacturing; Grocery and Related Product Wholesalers; Grocery stores; Specialty food stores; Full-service restaurants; Limited-service eating places; and Special food services.

Note: There was no "Crop production" employment after 2009. Self-employment data are not captured in this data.

<u>Additional Performance Measure</u>	FY 2012	FY 2013	Goal by 2015
Private Investment (Survey responses, not regional total)	\$20K to \$50K	\$85K to \$160K	\$500K to \$1 Million
Total Business Licenses (establishing baseline and goal required metric of 2012)	563 (May 2012)	142 (new licenses June 2012 – May 2013)	Increase of 1-3% over total
Number of new high tunnels installed	4	9 Planned	20
Number communities with local food related entities or programs	8	8	13
Pounds of subsistence resources are harvested annually in Southeast	5,600,000	No new studies have been done	NA
Number of Significant Actions on Action Initiatives	1	1	2 to 4
Number of Significant Meetings on Action Initiatives	1	0	5

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results. Alaska Corporations, Business & Licensing Database May 2012 & May 2013. Natural Resources Conservation Service Juneau Field Office High Tunnel Pilot Program Report May 2012. Subsistence Q&As, Forest Service, Alaska Region. Personal communication President, Lisa Sadleir-Hart, Sitka Local Foods Network; James Marcus, Southeast Soil and Water Conservation District (SSWCD) **2013 Note:** The SSWCD has identified the need for better regional coordination and intends to become a regional information clearinghouse for Regional Food Security, Mariculture, and Invasive Plant Management and envisions working with the SE Conference on the Regional Food Security issue quite closely.

Note: "Total Private Sector Businesses" is a count by ADOL of businesses with employees. "Total Business Licenses" is a count of all active business licenses, including proprietors and the self-employed.

Support Transportation Projects

Strategic Project/Goal

Performance Measures for Southeast Private Transportation Sector, 2009 to 2012

	2009 (Baseline)	2010	2011	2012	Change 2009- 2012	Goal by 2015
SE private transportation jobs (monthly avg.)	1,940	1,934	1,912	1,987	+2%	2,000 to 2,040 jobs
Total New Jobs		-6	-22	+75	+47	+60 to 105 new jobs
Total Jobs Retained		99.7%	98.9%	100%	100%	100% of 2009 jobs
Total Private Sector Businesses	139	145	140	156	100%	90% - 100% retained
Total Wages (mill\$)	\$90.1	\$91.6	\$91.4	\$98.6	+9%	Increase of 3-5%
Average Annual Wages	\$46,429	\$47,361	\$47,788	\$49,606	+7%	Increase of 3-5%

Sources: Alaska Department of Labor and Workforce Development, Research and Analysis section. Quarterly Census on Employment and Wages. Special reports by A. Abrahamson 2009-2012.

Note: Southeast Private Transportation Sector includes: Highway, street, and bridge construction; Transportation equipment manufacturing; Air transportation; Water transportation; Truck transportation; Transit and ground passenger transportation; Support activities for transportation. (Scenic and sightseeing transportation; and vehicle rentals excluded).

Note: Self-employment data are not captured in this data.

Additional Performance Measure	FY 2012	FY 2013	Goal by 2015
Private Investment (Survey responses, not regional total)	\$500,001 to \$1,000,000	\$1,260,000 to \$5,710,000	\$5 million to \$10 million
Total Business Licenses (establishing baseline and goal required metric of 2012)	599 (May 2012)	127 (new licenses June 2012 – May 2013)	Increase of 1-3% over total
Number of regional transportation projects (June 2012) (establishing baseline and goal required metric of 2012)	Construction 107 Design 105 Planning 11 Total 223	Construction 126 Design 112 Planning 15 Total 253	200 to 250 per year
Number of Significant Actions on Action Initiatives	13	1	8 to 15
Number of Significant Meetings on Action Initiatives	5	7	15

Sources: Southeast Conference. Southeast Conference Private Investment Survey Results. Alaska Corporations, Business & Licensing Database May 2012 & 2013. Alaska Department of Transportation & Public Facilities' project information database (<http://dot.alaska.gov/projects-status/index.cfm>).

Survey includes investments in: Scheduled Air Transportation, Enhancement of travel options in southeast by adding facilities and equipment.

Note: "Total Private Sector Businesses" is a count by ADOL of businesses with employees. "Total Business Licenses" is a count of all active business licenses, including proprietors and the self-employed.

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