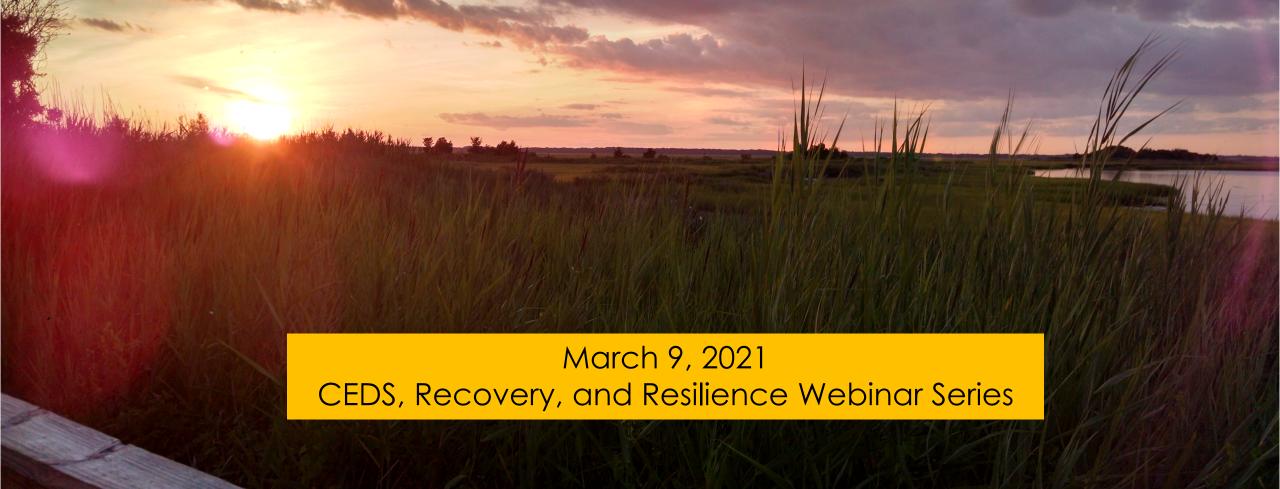
CEDS 101: What You Need to Know Right Now about the Comprehensive Economic Development Strategy









Many thanks!



Thanks for Joining the Webinar!

- Questions or comments can be submitted via the questions box on the right side of your screen in drop down menu
- A recording of the webinar will be made available soon at <u>www.nado.org</u> & <u>www.CEDSCentral.com</u>
- > Next webinar in the series:
 - March 23 Rural Resilience and Economic Development
- Please contact Brett Schwartz at <u>bschwartz@nado.org</u> if you have any general questions about NADO RF or the Stronger CEDS, Stronger Regions program



Today's Presenters

David Ives, Planning Coordinator U.S. Economic Development Administration (DC)

Brett Schwartz, Associate Director NADO Research Foundation (DC)

Meilani Schijvens, Owner & Director Rain Coast Data (AK)









In a nutshell...

The **Comprehensive Economic Development Strategy (CEDS)** is a locallybased, regionally-driven economic development planning process and document that creates the space for your region to identify its strengths and weaknesses and brings together a diverse set of partners to create good jobs, diversify the economy, and spur economic growth.

The technical stuff:

- Required for EDA designation as an Economic Development District
- Updated every five years with annual reports
- Submitted to EDA regional office for approval
- A CEDS Committee should be organized that "must represent the main economic interests of the Region"
- Requirement for various EDA funding including EDA's Public Works and Economic Adjustment Assistance programs & CARES Act funding



The CEDS is a Conduit for Resources to Your Region...



We are in a Golden Age for the CEDS

CEDS Content Guidelines: Make it Your Best Friend!

US Economic Development Administration - 030916

Comprehensive Economic Development Strategy (CEDS) Content Guidelines:

Recommendations for Creating an Impactful CEDS

Contents

1.		Overview	2
2.		Content	4
	A.	Summary Background: A summary background of the economic development conditions of the region	4
	B.	SWOT Analysis: An in-depth analysis of regional strengths, weaknesses, opportunities and threats	6
	C. wł	Strategic Direction/Action Plan: Strategic direction and an action plan (flowing from the SWOT analysis), ich should be consistent with other relevant state/regional/local plans.	11
		Strategic Direction: Vision Statement and Goals/Objectives	11
		Action Plan: Implementation	12
	d. Ce	Evaluation Framework: Performance measures used to evaluate the organization's implementation of the iDS and its impact on the regional economy.	
	E.	Economic Resilience:	15
		Planning for and Implementing Resilience	17
		Establishing Information Networks	18
		Pre-Disaster Recovery Planning	20
		Measuring Resilience	21
3.		Format	22
4.		Preparation	23
5.		Equivalent/Alternative Plans	25

- Provides guidance on the required sections of the CEDS
 - Summary Background
 - SWOT
 - Strategic Direction/Action Plan
 - Evaluation Framework
 - Economic Resilience
- Best practices, case studies, and links

www.eda.gov/CEDS

What's in Each Section? A Quick Overview

- Summary Background: A background summary of the region should answer the question, "What have we done?", and present a clear understanding of the local economic situation, supported by current, relevant data.
- SWOT: A SWOT analysis of the regional economy should answer the question, "Where are we now?" by using the relevant data and background information to help identify the critical internal and external factors that speak to the region's unique assets and competitive positioning.
- Strategic Direction/Action Plan: The strategic direction and corresponding action plan contained within the CEDS are the heart and soul of the document. They should answer the questions "Where do we want to go?" and "How are we going to get there?" by leveraging the analysis undertaken in the SWOT.
- Evaluation Framework: The evaluation framework serves as a mechanism to gauge progress on the successful implementation of the overall CEDS while providing information for the CEDS Annual Performance Report.
- Economic Resilience: In building economic resilience, it is critical that economic development organizations consider their role in the pre- and post-incident environment to include steady-state and responsive initiatives.

Summary Background

3,351

65* AGE WAVE The "Ape Wave" will communities, the work

72%

TRENDS

14

ŵ

8

.

An Economic Development Snapshot

III Statevide III LPNRD

\$\$\$ 00

00

x x x x

5

Ŀ

SOUTHEAST ALASKA

From this...

Health Care and Social Assistance

Taking care of people's medical needs and providing them with services to help them with their daily lives have become increasingly important professions. The demand for health care and social assistance will continue to climb as the Baby Boomers move through the different stages of older age. Demand may rise more rapidly in Alabama than in other areas, as the state has become an increasingly attractive place for people to retire.

Health care and social assistance already has gained prominence in East Alahuma, rising from being the dirid largest endprovent sector in 1990 to the second in 2007.³¹ It may be quite some time before it overtakes manufacturing, which has at least an 11,000 job lead, however, unlike manufacturing, this sector registered gains in the number of employees mate Alahuma attracted 1294 of the stude 'a new practitiones in these fields-good progests for a largely rural area. Small practices with fiver that 2000 employees predominant this sector Alabian tartexiced 1294 and the sector and the stude of the net keep pace with the statewide average. In 1999, medical and social service workers earned 11% less than the their counterparts throughout the state. That gain creaseds to 1594, by 2007.

All but one of East Alabama's counties gained employment in this sector between 1999 and 2007. Calhoun and Etowah	Figure 19. # Change in Health Care/Social Assistance Employment, 1999-2007
Counties vie with each other for the title of the' regional medical and social assistance center of East Alabama. Anniston and Gadsden are the two counties' respective central cities, and both draw clients from the hospitals and social service agreecies in Sylacauga (southern Talladoga County) Alexander City (northeast Tallapoosa	0 0 0 0 0 0 0 0 0 0 0 0 0 0
County) draw clients from neighboring Coosa and Clay Counties, making them the region's secondary medical and social assistance centers. Interestingly, Cleburne	Figure 20. % Change in Health Care/Social Assistance Employment, 1999-2007
assistance controls, interestingly, Circuitre County experimend the largest nate of increase in medical and social service practitioners. This spike may have occurred because Cleburne County now adjoins the Altanta metropolitan area. Although Costa County appears to have lost a significant percentage of its medical and social service providers, the reporting methodology makes	

33 See Table 23 in Appendix D.



more than 50 inches of precipitation any year, while those in the south receive slightly more, around 55 inchesperyear. Extreme heat is rare during the Summer, but temperatures in the nineties are quite common, reaching those about 64 days per year. The temperature only receeded one handled degrees on one or two days per year. During the winter months the temperature drys below freezing an average of 70 days. It drops to tevening or below only 70 or days per year.

Geographic Feature

Geographic features are major determinants of the physical potential of the area. These features determine opportunities and constraints that heps tank use patterns. They may also facilitate or impose restrictions on the economic development of an area. The fast Alahama Region is an area of dimine topographic constraint and by poissual factors and not winh startard accuraces. The applications is a strain the strain of the strain the strain term of the strain term factors and Applications, interpreted with broad, low-lying river valleys. The Coson and Tallaposen Rever for southwest through his portion of the train term of the highed relations in a Alabama term in monitor indices reparating base to rever posses the highed strain strain and the Alabama Rever framin monitor indices reparating base to rever posses the highed strain strain and Alabama Neural term in the strain and the strain strain term of the Alabama Rever frame and the strain and the strain strain term of the strain term and the strain term of the strain of the Ridge and Valley geographic province. Small portions of Elowah and Cherekee Counties neth and west of Valley geographic province. Small portions of Elowah and Cherekee Counties neth and west of Valley geographic province. Small portions of Elowah and Cherekee Counties neth and west of Valley geographic province. Small portions of Elowah and Cherekee Counties neth and west of Valley geographic province. Small portions of Elowah and Cherekee Counties neth and west of Valley geographic province. Small portions of Elowah and Cherekee Counties neth and west of Valley term of the Valley and Valley geographic province. The small strain term developing term of the Valley and Valley geographic province. Small portions of Elowah Mannatin strains of the strain term of the Valley and Valley geographic province. The remaining province, which extends can into Geogra and south the Fall Line, extending rengely from Charlans, Geographic to Mongemerey.

There are two major resource areas within the region. These are the Southern Appalachian Ridges and Valleys area and the Southern Piedmont area. Each of these areas is characterized by similar topography, soils and land use. These characteristics have produced a distinct, recognizable land form, which has advantages and disadvantages for land utilization.

The Southern Appalachian Ridges and Valleys land resource area, which is found in northern portions of the region, is also referred to as the Coosa Valley area. It is an area of small and medium sized farms and is covered by mixed hardwood forests. The landscape consists of wide, gently rolling valleys and steep, rough ridges, all extending in a northeast-southwesterly direction.

Elevation in the Ridges and Valleys area ranges from 507 feet to over 2,400 feet above mean sea level. Long, straight valleys and ridges influence transportation, agriculture, streams and roads. Extensive cropping and high crosion potential make the area subject to severe crosion.

The Southern Piedmont Land Resource area comprises over 50 percent of the region's land area. The area is characterized by gently rolling topography interspersed with steep hilly areas. Toward the north, the topography becomes rougher with some mountainous portions of the area having local relief of about 1000 feet. The Piedmont area was once general familand used primarily for cotton

...to this...

...and this!



Comprehensive Economic Development Strategy



Seafood Workforce Development. Headboare: Meet Regional Aseds.

T 2020 STRATEGIC PLAN

From this...



Credit: Everyday Health

...to this!









From this...



Credit: countingjobs.com.au



The eight capita	als
The capital	The definition
Individual	The existing stock of skills, understanding, physical health and mental wellness in a region's people.
Intellectual	The existing stock of knowledge, resourcefulness, creativity and innovation in a region's people, institutions, organizations and sectors.
Social	The existing stock of trust, relationships and networks in a region's population.
Cultural	The existing stock of traditions, customs, ways of doing, and world views in a region's population.
Natural	The existing stock of natural resources—for example, water, land, air, plants and animals—in a region's places.
(K) Built	The existing stock of constructed infrastructure—for example, buildings, sewer systems, broadband, roads—in a region's places.
Political	The existing stock of goodwill, influence and power that people, organizations and institutions in the region can exercise in decision-making.
A	The existing stock of monetary resources available in the region for investment



The existing stock of monetary resources available in the region for investment in the region. Credit: Wealthworks.org

From this...

...to this!



Credit: Industry Week



Resilience: The ability of a region or community to anticipate, withstand, and bounce back from shocks, disruptions, and stresses including:

Weather-related disasters or hazards / Impacts of climate change
The closure of a large employer or military base
The decline of an important industry
Changes in workforce / effects of automation
COVID-19 response & recovery
Much more...

Economic Resilience: What Do the CEDS Content Guidelines Say?

Economic resilience becomes inclusive of three primary attributes: the ability to recover quickly from a shock, the ability to withstand a shock, and the ability to avoid the shock altogether.

Steady-state initiatives tend to be long-term efforts that seek to bolster the community or region's ability to withstand or avoid a shock.

Responsive initiatives can include establishing capabilities for the economic development organization to be responsive to the region's recovery needs following an incident.

Visit: <u>www.eda.gov/CEDS</u>

Why **Regional** Resilience?

- Nearby communities often share similar risks/hazards
- Disaster impacts cross jurisdictional boundaries
- Communities are interdependent
 - Vulnerabilities in one community could impact another.
 - Mitigation investments in one community could impact another (positively or negatively).
- Economies are regional in nature
- Communities can accomplish more when they work together

Regionalism Works

Regionalism is a committed effort to improve communities through increased coordination and collaboration, maximizing efficiency through united approaches while preserving individual aspirations.

Steve Etcher, Former Executive Director, Boonslick Regional Planning Commission (MO)

U.S. Department of Commerce Economic Development Administration (EDA)

Coronavirus Aid, Relief, and Economic Security Act

https://eda.gov/coronavirus/

Greater Portland ECONOMIC RECOVERY PLAN



ACTION MATRIX

This matrix is intended to guide staff and stakeholders toward immediate action. It is a "living document" that can respond to new opportunities that may emerge over the next 24 months. The Lead Organizations noted below are recommended champions or key points of contact for the actions. However, they are not solely responsible for implementation and will need further support.

PRIORITY 2

Priority 2: Identify forward looking interventions for 13 industries that are at highest risk of disruption from COVID-19 and recessionary forces, focusing on traded sector to drive growth

Outcome/metric: Number of BIPOC and total businesses that are at highest risk of disruption supported

	Recommended Lead Organization	Recommended Partners to Engage
Enhance grant funding through Oregon Made Creative Foundation for Film and Recording industry tied to DEI efforts. Prior grant award example: "Pedal Through", a film about three young black women taking on a week-long bike packing adventure full of joy, healing, and mentorship with mother nature in Oregon's backcountry.	Oregon Film	
Technical and advisory services for business financials and understanding, marketing and sales pipeline strategy, and growth services.	OMEP	Impact WA
Connect manufacturers with business expansion opportunities through exporting and supplying to the DOD. Conduct custom supplier matching and supplier scouting to shorten supply chains and reduce risk.	OMEP	Impact WA, Business Oregon, PNDC, MEP National Network
For the manufacturing sector, provide or distribute grants for COVID education, operational excellence and workforce training / retention, food processing safety advice. (Also tied to Priority 3.1)	OMEP	Impact WA, Prosper Portland, Business Oregon, PNDC
Help businesses adopt and finance new technology to enhance jobs and skills, including gaining the tools to move from paper to cloud based services	OMEP	OMIC - Factory of Tomorrow, Impact WA

PRIORITY 3

Priority 3: All small businesses are important, but focus interventions on what is needed to stabilize and reopen businesses with 11-50 employees

Outcome/metric: Number of BIPOC and total businesses with 11-50 employees supported

	Recommended Lead Organization	Recommended Partner to Engage	
Technical assistance and grants focused on acquisition of software and technical training to scale construction and manufacturing businesses (improve office operations). Consulting services for succession planning, Provide consistent funding for staff.	OMEP, PDBG	SBDC, Oregon State (Austin Family BC)	
Mobilize Construction Career Pathways on publicly funded construction projects across the region to create career pathways for women and people of color and advance unified procurement processes that support the growth and participation of women and minority owned firms.	Metro	Construction Career Pathways (C2P2)	
Implement regional program to enforce jobsite culture training on publicly funded construction projects to address hostility and bullying so firms can retain and advance BIPOC employees.	cwwc	Oregon Tradeswomen	

The noted Lead Organization is the recommended champion and key point of contact for implementation. However, the Lead Organization is not solely responsible for implementation; it will need other funding and partners to implement the work which Metro and GPEDD staff will help secure.

Metro

3

SUPPORT Families &

CHILDREN

HELP SMALL

USINESSES

RECOVER &

GROW

ADVANCE

ECONOMIC

MOBILITY FOR

INDIVIDUALS

HELP SMALL BUSINESSES Recover & grow

PRIORITY 1

Tailor interventions for local consumer-oriented industries that have been hardest hit by COVID-19 and economic downturn

Outcome/metric: Number of BIPOC and total consumer-oriented businesses supported

Action	Recommended Lead Organization	Recommended Partner to Engage
Provide technical services to renegotiate lease terms with landlord. Fund a grant match program specifically to finance renegotiated lease terms.	SBLC	Law Firms, Commercial Brokers
Develop regional policy to waive or reduce fees for consumer-based busi- nesses (e.g. farmers markets, restaurants, child care)	GPI	Regional EDP
Develop regional standards to expedite Ti permits related to COVID and po- tential grants to fund improvements. Potentially include cost of heaters and awnings to allow for outdoor seating in winter, which may be more accept- able to customers.	GPI	Regional EDP
Develop a regional policy for cities/counties to hire special inspectors or 3rd party inspectors to aid construction review in the field, per state building code regulation. Prioritize hiring BIPOC 3rd party inspector.	GPI	Regional EDP
Provide regional training for cities/counties regarding cultural competency when delivering technical services for BIPOC businesses accessing financial institutions, business development services	GPI	Regional EDP
Explore advocating for regulations that protect public health, while also pro- moting economic recovery to help businesses in crisis. For example, some local economic development practitioners continue to hear that having the Oregon Liquor Control Commission allow restaurants to sell take-out spirits or stay open until 11:00pm could be the difference-maker in survival.	GPI	

The noted Lead Organization is the recommended champion and key point of contact for implementation. However, the Lead Organization is not solely responsible for implementation; it will need other funding and partners to implement the work which Metro and GPEDD staff will help secure.

AN ACTION-FOCUSED ADAPTABLE FRAMEWORK TO ADDRESS SMALL BUSINESS RECOVERY AND UNEMPLOYMENT IN RESPONSE TO COVID-19



Getting to 2022 Short-Term Southeast Alaska Resilience Plan

Southeast Conference is working in various ways to support the regional economy. In addition to the development of a five-year economic plan for growth and resilience in the region, Southeast Conference is concurrently crafting a short-term resilience plan to immediately shore up the regional economy, protect it from additional decline, and provide a caretaking role for our institutions to ensure the fundamentals of our economy will be in place by 2022, once the COVID-19 healthcare crisis has passed.

Top 10 Actions to Reinvigorate the Southeast Economy

- 1. Economic Disaster Declaration Request
- 2. Support Expedited Vaccine Distribution Planning
- 3. Work to Ensure Short-term Viability of the Seafood Sector
- 4. Plan for a post COVID-19 Southeast Alaska Economy and Health Care System
- 5. Plan to Regrow the Visitor Industry Post-Pandemic
- 6. Keep Southeast Alaskans in their Homes
- 7. Revitalization of Air, Ferry, Cruise, and Freight Transportation Services
- 8. Advocate for Childcare Prioritization in an Effort to Restart the Economy
- 9. Support Expedited Resolution to Solid Waste Shipping
- 10. Request Tariff Relief



The Most Effective CEDS Are:

Creative Engaging Driven by data Storytellers





CEDS Resource Library

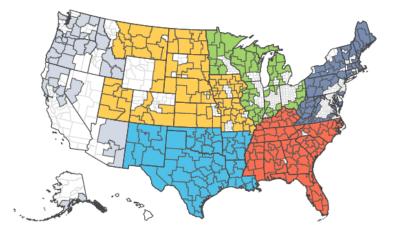
Comprehensive Economic Development Strategies (CEDS) contribute significantly to effective economic development across the United States. This great volume of information has previously been difficult to locate. It tended to be dispersed across countless websites, too often in formats that didn't let users search conveniently for the kinds of information they needed. Now, all CEDS are in a database with sufficient metadata to allow searching based on up to 50 different variables.

Quick Search

STATSAMERICA Your Portal to U.S. Data

Type in an economic development district

Or click on an economic development district in the map:



http://www.statsamerica.org/ceds/

Guided Approach to Examining CEDS



Report analysis, content and design

We've created 7 key categories and have identified what we are calling "exemplars" of the CEDS within each EDA region. Explore each of the categories and the CEDS exemplars for each-then click on the CEDS to see for yourself!



Explore by category »

Strategy development

Look up analysis conducted by regions similar to your own based on PCPI, demographics or other key characteristics. Note their strategies since peer regions likely share similar challenges and opportunities.





Strategic blueprint

What are the best practices to help turn the goals outlined in the CEDS into reality?

CEDS CENTRAL

Home CEDS 101 Training Resilience Case Studies About/Contact

Stronger CEDS, Stronger Regions CEDS Resource & Training Archive

www.CEDSCentral.com

Celebrate your victories!

Coastal

For a Better (Easier) CEDS and Southeast Alaska

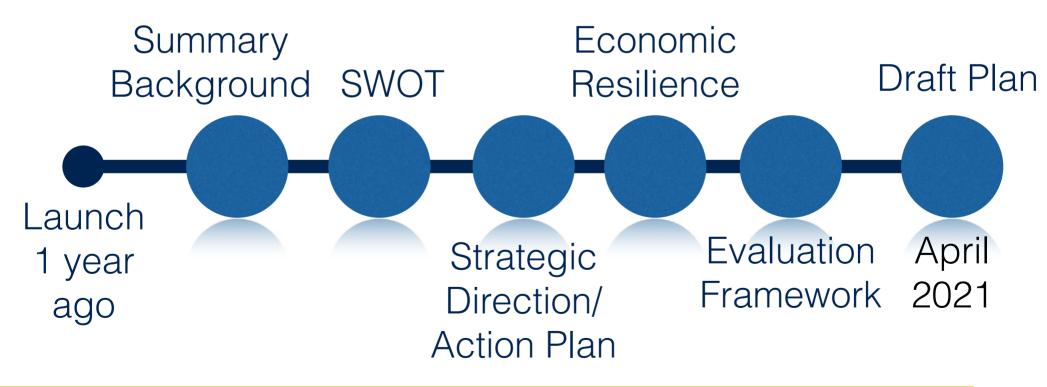
TTOS

What I think a CEDS is...

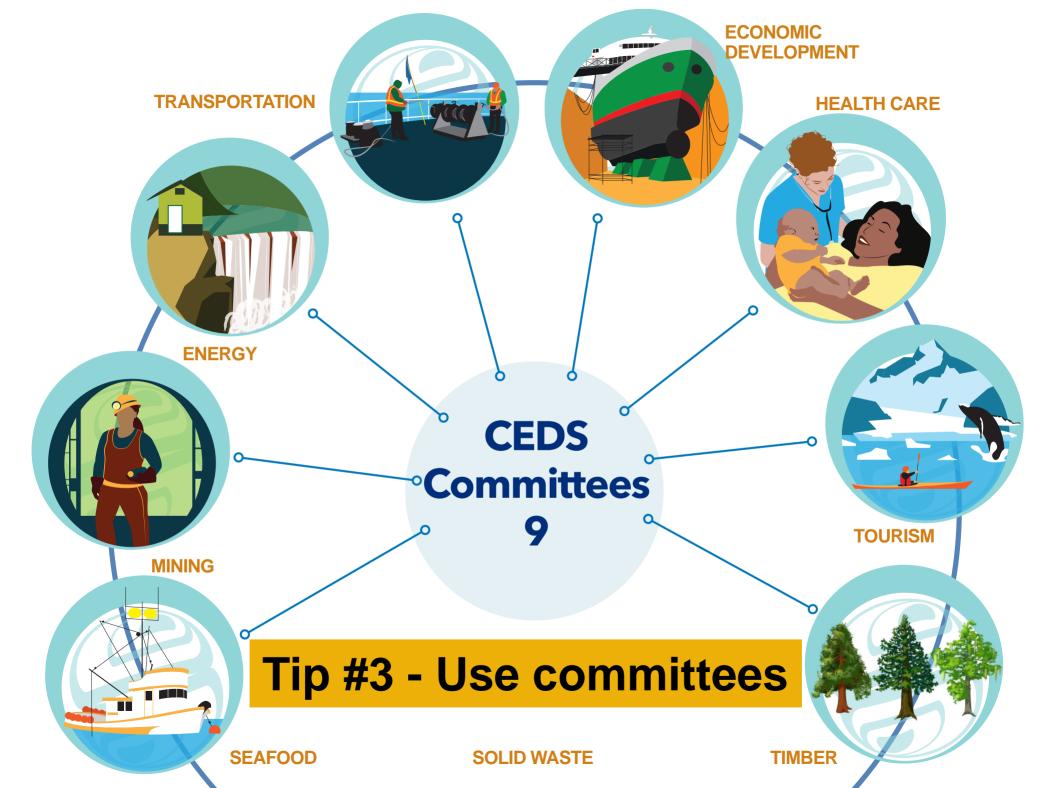
Tip #1 - the CEDS is just a big jigsaw puzzle

Timeline: Where are we in process?

www.seconference.org/strategy



Tip #2 - The longer the process, the better



32 Committee Meetings

Year

Southeast Alaska Comprehensive Economic Development Strategy Meeting Schedule

Month	Transportation	Energy	Timber	Seafood	Health Care	Tourism	Mining	Econ Devel.	Solid Waste
Jan/Feb 2020									
April/May 2020									
June/July/Aug 2020									
September 2020									
Oct/Nov/Dec 2020									
Jan/Feb 2021									

CEDS SWOT Analyses



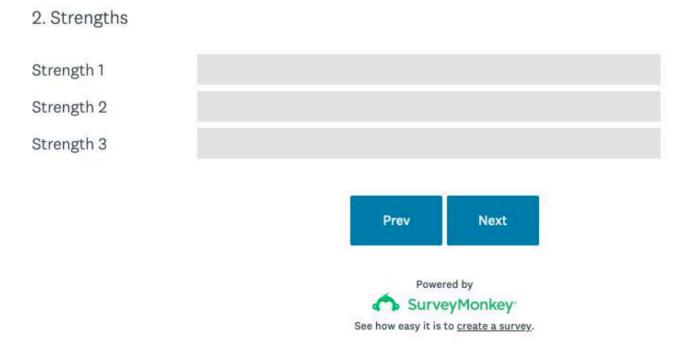
Tip #4 - Sticky notes and survey tools

SWOT Survey

Southeast Alaska Energy SWOT Analysis

Southeast Alaska Energy Strengths

What does the energy sector in Southeast Alaska do well? What unique resources does it draw on? What are the benefits energy provides to the Southeast Alaska region? What is the Southeast Alaska energy sector "known for"? Brief responses are fine.



Cashboard My Surveys Plans & Pricing	CREATE TEAM	CREATE SURVEY		? raincoastdata -
SUMMARY \rightarrow DESIGN SURVEY \rightarrow PREVIEW & SCORE \rightarrow Collect responses \rightarrow Analyze results \rightarrow Present results				
Southeast Alaska Seafood SWOT Analysis April 27		0	SURVEYM	ONKEY GENIUS
Southeast Alaska Seafood Strengths			1	
PICK 2 or 3 TOP ANSWERS. What does the Seafood sector in Southeast Alaska do well? What unique resources does it draw on? What are the benefits seafood provides to the Southeast Alaska region? What is the Southeast Alaska seafood sector "known for"?				erfect
1. Strengths		COMPL	TIMATED ETION RATE	ESTIMATED TIME TO COMPLETE
Sustainable			2 % mpleted	Minute
High quality product				
Infrastructure)	
Economic driver for region				ere is done!
Well-managed resource				hoose a way Ir survey.
Hatcheries			85.1	
Mariculture			LLECT RESP	ONSES
Clean vast shoreline, SE ocean				
Growing global markets				
Resilient/adaptive				
Technical innovation				
Abundance of seafood				
Great reputation/Alaska brand/Origin story				
Sophisticated workforce				
Health and nutrition awareness growing				
Year round operations				
Device View 🖵 📮 🖬	rvey Format 🛛 🗮 [
Device View 🛄 🗍 🗍 Seafood is important aspect of the cultural identity of SE Alaska				

SWOT prioritization

Economic initiative prioritization

Toursim Prioritization for 2025 Southeast Alaska Economic Plan

Greetings Southeast Conference Tourism Committee. In May and January you participated in strategic planning sessions to develop tourism initiatives for the region. Please use the tool below to prioritize this work effort.

1. Prioritize the Tourism Initiatives for the 2025 Southeast Alaska Economic Plan

≡	\$ Market Southeast Alaska to Attract More Visitor Spending and Opportunities
≡	\$ Grow Cultural and Arts Tourism Opportunities
≡	\$ Increase Yacht and Small Cruise Ship Visitation
≡∣	\$ Increase Access to Public Lands and Expand Southeast Alaska Trail Network

Strengths Weaknesses Opportunities Threats Southeast Alaska's

SWOT

Southeast Alaska SWOT Analysis: Strengths, Weaknesses, Opportunities, and Threats 2020

At Southeast Conference's February 2020 Mid Session Summit, nearly 300 people representing small businesses, tribes, native corporations, municipalities and community organizations participated in two types on SWOT analyses: one for the region overall, and sector specific SWOTs within the Southeast Conference committee areas. Follow up work occurred between March through October in Zoom meetings and through surveys to improve and prioritize the sector-specific SWOTs. This document is a summary of each of these Southeast Alaska SWOT analyses.

A SWOT analysis is an in-depth analysis of strengths, weaknesses, opportunities, and threats. These regional SWOT analyses identify the region's competitive advantages along with internal or external factors that keep us from realizing our potential. It helps answer the question, "Where are we now?" by identifying critical internal and external factors that speak to the region's unique assets that we can leverage to maximize the economic potential of Southeast Alaska

The sectors that received their own SWOTs include seafood, mining, energy, transportation, health care, tourism, and timber.

Conducting a SWOT analysis was the first step in a year long planning effort to develop the Southeast 2025 Economic Plan: A five-year economic development strategy that will act as a blueprint for regional collaboration and growth. In order to develop the elements of this plan-a clearly defined vision with prioritized goals & measurable objectives and a strategydriven Southeast Alaska action plan-it was critical that an analysis of the region's competitive strengths and weaknesses were assessed so that the foundation of the plan could be built upon a common understanding and set of goals.

The first step for each SWOT was asking participants to write down their thoughts, and in doing so generated more than 2,500 individual written comments that became part of this analysis. Once categories were solidified, Southeast Conference members participated in a series of prioritization exercises to determine the most significant components of the SWOT.

A full analysis of all 2,500 comments was conducted, and is presented on the following pages. A radical decline in ferry service drove three of the four top responses for each overall regional category:

• Top Strength: Beauty and Recreation Opportunities

- Top Weakness: Decline of the Ferry Transportation • Top Opportunity: Strengthening Ferry Connectivity
- Top Threat: Loss of Ferry Service



STRENGTHS

Beauty and recreation opportunities

Tourism sector Seafood industry Rich Alaska Native culture and heritage

People and Southeast Alaskan spirit Great place to raise kids/families

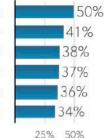
WEAKNESSES

Ferry transportation decline Cost of living and doing business Transportation costs Housing: Not enough/too expensive Aging or lack of infrastructure Dependence on State oil economy

OPPORTUNITIES

Strengthen ferry connectivity Mariculture development Seafood product development Cultural tourism development Renewable energy Improve infrastructure

Reduction/loss of ferry service **Fisheries** decline Poor leadership/decision making Cost of living Climate change/global warming Capital move/capital creep



59% 42% 34% 32% 26% 22% 30% 60%

50% 43% 31% 28% 23% 22%

		54
in and the second	34%	
	34%	
	33%	
	29%	
	28%	

REGIONAL SWOT SUMMARY

This page provides a summary of the full SWOT process, both for the overall SWOT of the Southeast Alaska economy, as well as for the sector specific SWOTs for seven regional industries.

Seafood

- Top Strength: High quality product
- Top Weakness: Changing ocean conditions Top Opportunity: Increase value added
- processing
- Top Threat: Ocean acidification & changing conditions

Health Care

- Top Strength: Personalized care delivery
- Top Weakness: State budget cuts reduce workforce development options
- Top Opportunity: Development of health care courses at the university
- Top Threat: Growing health care costs Visitor Industry
- Top Strength: Natural beauty of region
- Top Weakness: Community communications
- Top Opportunity: Collaborate with Alaska
- Native entities on cultural tourism
- Top Threat: COVID 19
- 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: Environmental groups/lawsuits

Timber

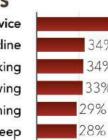
- Top Strength: High quality wood
- Top Weakness: Frequency of litigation
- Top Opportunity: Increased state and private lands
- Top Threat: Environmental litigation

Transportation

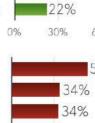
- Top Strength: Strong reliable airline services
- Top Weakness: AMHS service reductions
- Top Opportunity: Improve ferry service
- Top Threat: The demise of ferries
- Energy
- Top Strength: Abundant hydropower
- Top Weakness: High costs of infrastructure
- Top Opportunity: Expand regional intertie
 - Top Threat: An economic downturn

Southeast Alaska 2020 SWOT Analysis Prepared by Rain Coast Data for Southeast Conference Page 2

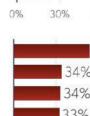
THREATS



- 0% 30%
- - 60% %







Summary Background

Tip #5 - The summary background can be a really useful short annual economic publication.



www.seconference.org/southeast-alaska-by-the-numbers/

Table tracks key Southeast indicators over the FOUR YEARS OF CHANGE: 2014 to 2018

W

Test.

			% CHANGE	CHANGE
DEMOGRAPHICS	2014	2018	2014-2018	2014-2018
Population !	74 432	72.872	-2%	-1.556
Ages 65 and older ³	9,243	11.089	20%	1.844
Under Age Five 2	4.622	4.146	-10%	-476
Twenty somethings 2	9,398	8,447	-10%	-95
K-12 School District Enrollment 3	11,804	11,334	-4%	-470
GENERAL ECONOMIC CONDITIONS	11,004	11,334		1
	10,000	15.110		
Total Labor Force gobs, includes self-employed & USCGI1.5.6	45,694	45,642	0%	-5;
Total Job Earnings ^{1, 5, 6}	\$2.17 billion	\$2.28 billion	5%	+\$109 million
Total Private Sector Payroll 1.4	\$1.41 bilion	\$1.51 billion	7%	+\$97 million
Average Annual Wage 1	\$47,593	\$50,023	5%	\$2,43
Annual Unemployment Rate 1	7.1%	6.0%	-1.1%	-1.19
FOP ECONOMIC SECTORS	2014	2018	% CHANGE	CHANGE
SOVERNMENT	PUBLIC SECTOR	35% OF ALL ENFLOYIN	ENT EARNINGS	1
Total Government Employment 1, 5	13,602	13,148	-3%	-454
Federal Employment ^{1, 5} (8% of all employment earnings)	2,110	2,111	0%	
State Employment 1 (14% of all job saminos)	5,504	4,771	-13%	-731
City and Tribal Employment 1 (14% of all job earnings)	5,988	6,266	5%	278
Total Government Payroll (includes USCG) 1.5	\$765.8 million	\$776.9 million	1%	+\$11 million
Total State of Alaska Pavroll	\$311.3 million	\$283.3 million	-9%	-\$28 million
ISITOR INDUSTRY	Key INDUSTRY:	11% OF ALL ENFLORME	NT EARNINGS	1
Total Visitor Industry Employment ^{1, 6}	6.923	8.004	16%	1.081
Total Visitor Industry Wages/Earnings 1-4	\$188.5 million	\$249.3 million	32%	+\$60.8 million
Total Southeast Alaska Passenger Arrivals	1,359,897	1,618,311	19%	258,414
Cruise Passengers 10	967,500	1,169,000	21%	201,500
Total Air Passenger Arrivals from Outside SE 11	372,197	435,476	17%	63.279
Total AMHS Passengers from Outside SE 12	20,200	13.835	-32%	-6.36
COMMERCIAL FISHING & SEAFOOD INDUSTRY		10% OF ALL EMPLOYNE		-0,000
Total Seafood Employment includes fisherment 1-9	4.372	3.711	-15%	-661
Total Seafood Employment Earnings 1.4	\$259.0 million	\$237.4 million	-8%	-\$21.6 million
Pounds of Seafood Processed ⁷	232.9 million	132.7 million	-42%	-97.8 million
Pounds or Searado Processed Pounds Landed common sarado whole counds by SE residents ⁸	300.0 million	185.2 million	-38%	-114.8 million
Estimated Gross Earnings to read while pounds by streadents."	\$277.1 million	\$246.9 million	-11%	\$30.2 million
Shared Fish Taxes ¹³	\$5.8 million	\$4.5 million	-22%	-\$1.2 million
HEALTH CARE INDUSTRY (PUBLIC & PRIVATE HEALTH)		11% OF ALL EMPLOYME		-\$1.2 Hillion
Health Care Employment 1-4	3,523	3,990	13%	46
Health Care Wages 1-4		\$243.3 million	25%	+\$48.5 million
ARTIME ECONOMY (includes employment from all inclustres)		PRNATE SECTOR EVPS		+349.5 million
Private Maritime plus USCG Employment 154	6.768	6,273	-7%	49
		5396.8 million	0%	+\$1.3 million
Private Maritime plus USCG Wages 184	2014	2018	S CHANGE	+\$1.3 million
OTHER SELECTED STATISTICS	and the second se	and the second se	and the state of the	
Construction Employment 1.4(8% all employment earnings)	2,168	1,909	-12%	-259
Mining Employment 1 (4% of all employment earnings)	783	889	14%	104
Price of Gold ?	\$1,266	\$1,268	0%	53
Total Southeast AMHS Ridership ¹²	242,648	179,312	-26%	-63,33
Cost of Living: Consumer Price Index ¹	215.8	225.5	5%	9.7
Housing Starts: Housing Permitted /Completed 4.1	321	188	-41%	-133
Avg. Daily Volume ANS Oil Production (mbbls/day)14	512,810	508,601	-1%	-4,209
Annual Avo. Domestic Crude WIT Oil Prices (in \$/Barreli ¹⁴	\$97.88	\$71.71	-27%	.\$2



2018 Southeast Alaska Employment Earnings

	EMPLOY	MENT RELATED E	EMPLOYMENT NUMBERS			
2	Wages (2018)	Self-Employment Earnings (2017)	Total Earnings	Annual Average Employment (2018)	Self- Employed (2017)	Total Employmen
Government (includes Coast Guard)	\$721,459,750	\$55,467,580 CG*	\$776,927,330	12,486	662 CG*	13,148
Visitor Industry	\$216,101,975	\$33,241,000	\$240,342,075	7,037	967	8,004
Seafood Industry	\$61,983,458	\$175,459,000	\$237,442,458	1,458	2,253	3,711
Trade: Retail and Wholesale	\$120,405,013	\$24,666,000	\$145,071,013	3,903	587	4,490
Health Care Industry (private only)	\$154,278,150	\$14,330,000	\$168,608,150	2,615	237	2,852
Construction Industry	\$88,673,702	\$32,972,000	\$121,645,702	1,331	578	1,909
Financial Activities	\$52,935,761	\$69,216,000	\$122,151,761	1073	757	1,830
Professional and Business Services	\$78,756,495	\$44,242,000	\$122,998,495	1,606	1,304	2,910
Mining Industry	\$92,753,768	\$274,000	\$93,027,768	879	10	88
Social Services	\$42,218,089	\$4,224,000	\$46,442,089	1,289	187	1,47
Information (publishing, broadcasting, telecomm.)	\$22.074,083	\$1,474,000	\$23,548,083	483	58	54
Timber Industry	\$16,739,683	\$2,025,000	\$18,764,683	280	57	333
Watehousing, Utilities, & Non-Visitor Transport	\$46,340,395	\$15,414,000	\$61,754,395	777	166	94
Other	\$66.819,751	\$27,657,000	\$94,476,751	1,677	925	2,602
Total	\$1,781,540,073	\$500.661.580	\$2,282,201,653	36,894	8,748	45,642

did not report income are accluded, Viaiter industry includes leaves & hospitality, and viait for foreign, and wood conduct manufactures thread walks respect commercial functions, plannesided tenerrises is created on Jair, water, scenic). Timber includes forestry and logging support acti

Southeast Alaska by the Numbers 2019

A

2.5% .

aast Alaska by the Numbers 2015

0.25%

0.05%



THE VISITOR

INDUSTRY

WAGES UP 8% Most passengers arriving in the region come

The visitor industry is the largest private L he visitor industry is one angels preview sector industry in Southeast, both in jobs and, since 2016, in total workforce earnings (see chart on page 5). Indeed, if the industry Between 2010 and 2020, the number of cruise continues to grow it is set to edipse both the passengers arriving in the region is projected to increase by a staggering 65%, including municipal and state povernment sectors in total wages (it is already larger than both in two-year growth of 23% expected between 2018 and 2020. Southeast Alaska will receive terms of employment) and become the region's largest sector overall. The visitor 5% of all global cruise ship passengers in industry accounted for 18% of regional 2019 employment (8,004 annual average jobs) and In 2019, 40 cruise shins are scheduled to visit a quarter of all private sector employment.

in 2019, 40 cruse ships are scheduled to visit the region, canying 1.36 million passengers on 577 voyages. In 2020, ten new ships and 29 additional port calls are expected to be Since 2011, tourism has added more than 2.000 year-round equivalent lobs to the Southeast economy. Those working in the visitor industry earned \$249 million in 2018added, while 7 ships will be phased out of the region. Lines with new ships will include Carnival, Princess, Royal Caribbean, or 11 percent of all regional employment income. The average annualized wage in the Norwegian, and Oceania. Lines that plan to reduce their Alaska fleet include Holland visitor industry is \$31,152, significantly lower than the average regional wage of \$50,002, America. Crystal and Azamara, which has no but it is a figure that has been steadily ships scheduled to visit Alaska in 2020. increasing over time. KEY ECONOMIC DRIVER

In 2018, 1.6 million air, ferry, and cruise Southeast Alaska is the most visited part of passengers came to Southeast Alaska from passengers came to Southeast Alaska from outside the region, a 19% increase over 2014, to the engion, One-thirds of all Jourists corning to the engion, One-third of all Alaska visitor Airline passenger traffic from outside the spending occurs in Southeast, where visitors

region grew 17%, and cruise passenger traffic are expected to spend nearly \$800 million in to the region increased by 13%. However, ferry arrivals from outside the region fell by 2020. INCREASED JET SERVICE 32% due to decreases in funding and service.

204

For the fourth year in a row in 2018 Southeast

Chart Southeast Alaska

2008 2020

ġ,

5

milli

36 44

R

million

Alaska saw a record-breaking number of airline passengers from outside the region, by cruise ship then any other mode. When tourists only are considered, that figure will be with 435,476 arrivals. However, in 2019 air passenger numbers declined. As of July 2019, sinine passenger arrivals were down 496 over the first half of 2018.

filter

VISITOR OUTLOOK

The visitor industry has the strongest outlook of all Southeast Alaska industries. Alaska's popularity as a visitor destination has continued to grow. In 2018, Glacier Bay was rated the best cruise designation in the world by cruisers. More Americans are traveling due to a strong national economy and international travel destinations are increasingly perceived to have security risks. Cruise passenger arrivals are expected to continue to rise as larger, higher-capacity vessels visit the region. Along with increased visitors, the number of jobs and associated income in this sector will continue to rise.

However, Southeast's strong visitor economy is tied to a strong national economy. As more signals suggest the possibility of a national recession, the region should be prepared for this sector to see a reduced number of visitors



nic Impact

nton of ADOL 2018 Employment and Wage data and 2017 US Census Nonemployer (eliverpolyment) Statistics, McDoard Closer, US Barreau of Transportation Initia Marine Highway System, Chilae Line Agencies of Alader, Chilae Marker Witth, Chilee Child, Juneau International Argost Faster age Faster age Source: Constraint in ACC, 2019 Englanmin and Wag, Bais and 2019 (E.G. Kan, Sharengbay Malengbay) with Sharen, Markan (G. S. Kan, J. Sharen, J. Hangporter, Markan Sharengbay, Promess 2019, U.S. Sharengbay, S. S. Sharengbay, M. Sharengbay, M. Sharengbay, S. Shar Contraction of the second

DEMOGRAPHICS

Southeast Alaske by the Numbers 2019

Prepared by Rain Coast Data Page 7

Population 72,876



Prepared by Rain Coast Data Page 5

of Alaska jobs changed the economic trajectory of the region. THE THOSE MANAGED A

3

n, own 3.4 percent (726, 100 acres) of the land b private landholdings account for 0.05 percent of the land in 2017, communities received nearly \$15 million in federal ant in Leu of Taxes and Secure Raral Schools funding to

Prepared by Rain Coart Data Page 16

Bog mixing of the . 1995/20 sealed and stream discuss, the second of the first of the segarate accounty. However, even that next decade page right and search is fit to explore (decad), taging of 12,220 workson, the second sec

ral ownership of the regional land ba

2



Borough 33,000 an Barough 13,889

A Descent of the second s		Petersburg Borough	3,178	3,198	-9	-
Zotto revision the the managery year of registrary populations duration in Southware Adatas, but the next issue 160 popular was parter a fraction of those associate previous years. Intel of the communication in the including the businessity of Marchinan, Patretology, Harless, and Wanagel In general, appeading to busine lawyer and adatasets and the source and the adataset of the source and the adataset of the source and adatasets and the adatasets of the population channess, the island population as a which declared by 21%.	Missioners Mere people moved away from Southeast than moved here in 2016, but natural increases helped reduce the inpact of ournigenten. In 2018, fease were 265 more lattle than deaths, while 355 more people moved out of the region than mored in	Heines Borough	2,551	2,480	-70	
		Wrangell Borough	2,413	2,426	11	
		Motiskatis	1,445	1,398	-49	
		Craig	1,205	1,095	-112	
		Skapway Barough	1,038	1,068	109	
		Klawock	913	777	-28	
		Hoonah	786	789	1	
		Kaks	627	601	-26	
	Actes Contracts Sona 2010, the mast personanced derrographic with Tas been aging of the paralitation. During the paralitation increase over 2010 disc to aging in place and age to an order. It is a sonal ways and are non age to an order. It is have, Mangall, with the Standar Angeour context of the sonal Ast, respectively, is notify one task. The average age of Sachaest as a whole is 30°. Juncou is comparising in the sonal ast.	Yakusat Borough	623	523	-109	
		Guatevea	518	554	35	
		Thorne Bay	530	524	-0	
		Angeos	420	410	.10	
		Hydaburg	417	398	.9	
		Coffman Cove	175	168	-8	
The leveling cut of foreas corner an relative to the region Between 2014 and 2014, Southeast Abasics population decreased by 1,642. The learner wave region-reduc, with also of sight borrough ongrotting population doclaws. The homosphir of Bezgiven and Wrangel given by 11% and less than one percent, respectively, during that period.		Terakee Springs	129	144	17	
		Holis	93	124	31	
		Naukati Bay	1.20	124	4	
		Klukovan	- 84	94	10	
		Hyder	91	80	-13	
		Kassen	76	D1	٥	
		Palan	77	68	-9	
		Port Alexander	- 45	58	10	
	POPULATION OUTLOOK	Edra Bay	- 47	43	-4	
Juneau is the Loss Leaper Population losses were most significant in Juneau. Dramatic cuts in state employment contributed to a reduction of meety 900 excidents in the condition for over the next	out, but uncertainty regarding the state funding cuts makes it hand to project future changes. As long as the state continues to	Whale Pass	38	57	17	
		Port Protection	56	31	-24	
		Game Creek	18	18	0	
		Efin Cove	16	12	-4	
		Binlar Balant	43.	12.2	0	

Amaze in the Lost Lanzer Population loses were not applicate in Actual to loses were not applicate in Actual based on state recipioner and construct a analysis of state recipioner construct a state and analysis construct analysis construct a

Seates: Alexa Department of Labor (IDDC); ADD: Southeast Photography credits Dublics Hart. Southeast Alaska by the Numbers 2019

Prepared by Rain Coast Data Page 15



2016 2011 2012 2013 2914 2015 2016 2017

Southeast Seafood Station Landed in SE ALASKA BY SPECIES, 2018 Industry 3,711 Jobs Ottoring - % of harvest by POLLAR value 12 million

DOWN 118 JOBS IN 2018

The regional 2018 fishing season was and total pounds lunded was the lowest significantly below the terview a reverge and total pounds lunded was the lowest since the 1980s. Poor privil selecon and herring returns are permanity to blarms. The Southeast Alarka selected hervest in 2018 see 185 million pounds with an 2018 year 165 million pounds with an co-vasial value of \$247 million. An "average" year would have nexted 111 million more pounds of seriood, and earned foltermen SS7 million in direct oarnings. Felsennen cought 100 million hever pounds of pink selmor then would e year, and 19 millo is. However, a millo chure return helped effort some of these

Key Economic Device The regional sectord industry (including

The regional sectoral industry (including commercial flahing and warfood processing) generated 3,711 annual regional jobs and 233 million in warrings in 2018, making up 8% of jobs in the region and 10% of anning This represents 118 fewer jobs than last year and a loss of 650 jobs since 2015

The majority of the statewide catch of ook, coho, keta (chun), ehrimp. one craits, and the dive listeries occurs east Alaska, in 2018, the five salmon scorb, and the idea falaxies course before main rejects in to yours interce with the term presented 70% of the regional storby valaming harmonic main rejects in to yours interce presented 70% of the regional storby valaming harmonic main rejects in to yours interce presented 70% of the regional storby valaming harmonic main rejects in to yours interce presented 70% of the regional storby valaming harmonic main rejects in to yours interce presented 70% of the regional storby valaming harmonic main rejects in to yours interce storby valaming harmonic main rejects in the yours storby valaming harmonic main rejects

Basil Vallar, ST.25. milliong, mancata ma. Annato a Account BH Sequence and Mage data. 2017. IS Consult Rooman. Neurosci 10: 2015 Statutest Abasis. Conversati factor in language harvest and Neurosci 10: 45 Statusci. 2019. Metric 2017. Statusci Tassa Ann antige includes animal approximation. Rohop, B subcod product programbian and an el subcoding. Langua Vallar Mark Mark Mala Mage and Mage and and an el subcoding. Language Vallar Construction and Mage Magazatoria.

ast Alaska by the Numbers 2019

1000

Oth largest since statshood SEAFOOD PROCESSING

teefood pounds processed true 2017. State shared fidheries taxes for processing activity in FV18 generated \$4.5 million for gional communities

o-trinds of regional assifted business

black cool, at 9% of the total catch, accounted for nearly one-third of total catch value in 2018. had been realized by the late summer 2 mostly due to a poor Churk return. Only marter of the expected Churk had been and by early September Pink solmon were 76% below 10-year averages. Warm see temperatures between 2013 and 2016 are being blarned for the reduction in pink solmon. Uncertainty related to hervest fluctuations, a stum of war turn of warming occan temperatures (in-1 "the blob"), Chinese teriffs, commercial ries budget cuts, and global advances i

There was significant variability across faheria is 2018. Southeast Alaska's 2018 king salmon salmon fairning all contribute to growing coscerns. Retailarcov tariffs imposed by O have already caused a one-third drop is U surfeed sales, and more saufood tariffs an season was the worst in 57 years of record



AFOOD INDUSTRY OUTLOOK

lead-in reported on unknown to obtained leaders reported on unknown the obtained built of 44 million salmon was somewhat below typical years, only 60% of that remote had been realized by the late summer 2019,

Tip #6 - Find a better name

Tip #7 - Keep the document short Southeast Alaska Economic Plan 2020

Southeast Alaska 2020 Economic Plan

outheast Conference's Comprehensive Economic Development Strategy 2016-2020

SOUTHEAST CONFERENCE

Southeast

Updated June 2017

Prepared by // Rain Coast Data

One page summary

Strategic Direction/Action Plan 2020

Transportation



Minimize Impacts of Budget Cuts to AMHS and Develop Sustainable Operational Model.

Road Development.

Move Freight to and from Markets More Efficiently. Ensure the Stability of Regional Transportation Services Outside of

AMHS.



Energy

Work with Federal and State Government to Promote Regional Energy Projects. Diesel Displacement.

Support Community Efforts to Create Sustainable Power

Systems That Provide Affordable/Renewable Energy. Complete Regional Hydrosite Evaluation for Southeast Alaska.

MA N

Maritime Maritime Industrial

Support

Maritime Industrial Support Sector Talent Pipeline: Maritime Workforce Development Plan.

Increase Access to Capital for the Regional Maritime Industrial Support Sector.

Harbor Improvements.

Examine Arctic Exploration Opportunities That the Region as a Whole Can Provide.

Seafood Industry

Mariculture Development. Full Utilization and Ocean Product Development. Increase Energy Efficiency and Reduce Energy Costs. Regional Seafood Processing. Seafood Markets. Sea Otter Utilization and Sustainable Shellfish. Maintain Stable Regulatory Regime.



Visitor Industry

Market Southeast Alaska to Attract More Visitors. Improve Access to Public Lands. Increase Flexibility in Terms of Permit Use. Increase Yacht and Small Cruise Ship Visitations. Improve Communications Infrastructure. Advocate for Adequate Funding to Maintain Existing Recreational Infrastructure.

Timber Industry

- Provide an Adequate, Economic and Dependable Supply of Timber from the Tongass National Forest to Regional Timber Operators. Stabilize the Regional Timber Industry.
- Work With USFS to Direct Federal Contracts Toward Locally-Owned Businesses.
- Support Small Scale Manufacturing of Wood Products in Southeast Alaska.
- Continue Old Growth Harvests Until Young Growth Supply is Adequate.
- Community-Based Workforce Development.

Update Young Growth Inventory.

Other Objectives

Housing: Support Housing Development.



Food Security: Increase Production, Accessibility, and Demand of Local Foods.

- **Communications:** Improved Access to Telemedicine in Southeast Alaska.
- Marketing: Market Southeast Alaska as a Region.
- Solid Waste: Regional Solid Waste Disposal.
- Arts: Increase Recognition of Southeast Alaska's Thriving Arts Economy.
- **Mining:** Minerals & Mining Workforce Development. Attract Research Jobs.
- **Research:** Attract Science and Research Jobs to Southeast Alaska. **Cultural Wellness:** Support Development of Activities and Infrastructure That Promote Cultural Wellness.



One page summary

Maritime Workforce Development Marine Highway Reform Project

Diesel Displacement

Alaska Mariculture Initiative Priority Objectives

Full Seafood Resource Utilization

Market Southeast Alaska to Visitors Secure Adequate Timber Supply





meilani@raincoastdata.com