



A Stronger, More Resilient Economy: *An Update to the FNSB Comprehensive Economic Development Strategy*

Economic Development Commission (EDC)
November CEDS Work Session

November 23, 2021

Introductions

Review: What does a CEDS do?

- Brings the private and public sector together to develop a regional strategy and action plan.
- Identifies projects and makes recommendations to:

Secure and
support
businesses

Create
more and
better
paying jobs

Improve
quality of
life

Increase
resilience
to changes,
threats

CEDS Update Timeline

	2021									2022						
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	→
Project Website	•	← ongoing website updates →														Adoption
Stakeholder Interviews	•	•	•	•	•	•	•	•	•							
Interactive Discussions	•	•	•	•	•	•	•	•	•							
Community Events			Midnight Sun, Golden Days, Fair					We are here								
Economic Summit										•						
E-Newsletters, Social Media, Public Notices, News, Radio										•	•		•		•	
Key Phases	<i>Project Kickoff</i>		<i>Research & Events, Interviews</i>				<i>Draft Vision & Goals</i>			<i>Economic Summit</i>		<i>Public Review Draft</i>			<i>Final CEDS</i>	→

SWOT and Situational Assessment

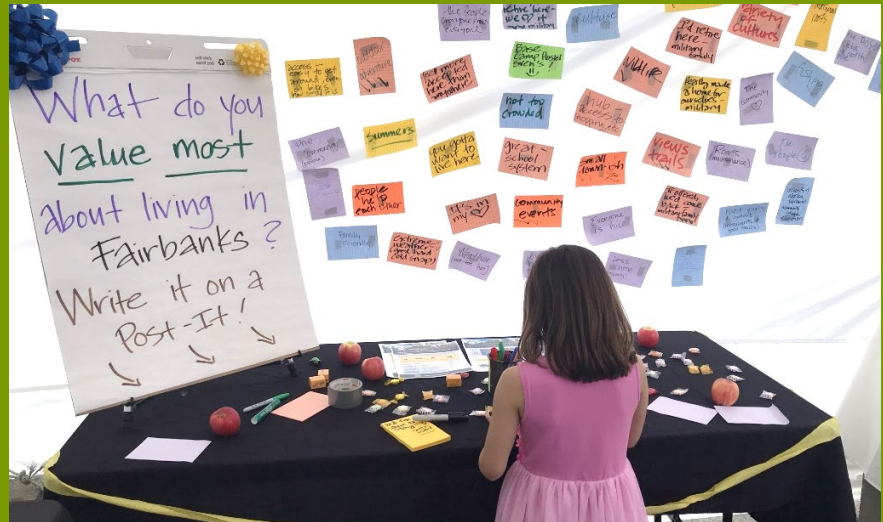
SWOT Analysis Highlights

- Captures input from community events, interviews, background documents, sector conversations, data, news articles, and other sources.
- These slides highlight general themes from the SWOT. The Full CEDS will also include mini, industry-specific SWOTs.

	Internal	External
Positive	Strengths	Opportunities
Negative	Weaknesses	Threats

Strengths

What are our competitive advantages?



Midnight Sun Festival, June 2021

COMMUNITY	ENVIRONMENT & OUTDOORS	DIVERSE INDUSTRY SECTORS
<ul style="list-style-type: none">• Strong sense of community• Small-town feel• Strong Native community• Culture• Community events• Arts, culture• Local restaurants, breweries• Ability to buy local products• Steady population• Family-friendly	<ul style="list-style-type: none">• Nature• Summers• Extreme weather• Scenery• Trails• Outdoor recreation• Fishing• Wildlife• Aurora	<ul style="list-style-type: none">• Economic hub of Interior Alaska• Diverse industry composition• Military as leading employer, bringing jobs, investment, new residents• Construction industry• Visitor Industry

Strengths

PUBLIC FACILITIES & SERVICES	NATURAL RESOURCES	LOCATION/CONNECTION/ ACCESS
<ul style="list-style-type: none">• Strong public schools• UAF and community college that contribute to a skilled workforce• Museums that support visitors, researchers, history• Transfer stations	<ul style="list-style-type: none">• Mineral resources• Natural gas	<ul style="list-style-type: none">• Connected by railroad, roads, airports, and utilities to other parts of the state• Hub for Interior Alaska• Airport status as Foreign Trade Zone

“Lots of potential near Fairbanks for more large-scale mining.”

-Stakeholder Interview

“I like that we’re on the road system.”

-Midnight Sun Festival input

What are our competitive disadvantages?

9

Opportunities

What are potential or upcoming opportunities for improvement or progress?



Downtown Fairbanks

NATURAL RESOURCES	VISITOR INDUSTRY	MILITARY/ARCTIC GROWTH
<ul style="list-style-type: none">• Efforts underway to decrease energy costs and increase energy security/reliability (e.g., Interior Energy Project)• Increased demand for natural gas• Extraction industries can provide tax revenues• Increased interest in food security and agricultural expansion	<ul style="list-style-type: none">• Growth in Arctic tourism• Year-round visitation• Alaska Long Trail• Revitalizing Fairbanks and North Pole downtowns	<ul style="list-style-type: none">• F-35 & KC-135 Missions• Increased military presence in the Arctic• Arctic research at UAF and with other research institutions• Continued expansions and innovations on military installations (e.g., missile defense expansion, Clear's Space Force designation, Eielson's micro nuclear reactors).

Opportunities

REGIONAL COLLABORATIONS	INFRASTRUCTURE
<ul style="list-style-type: none">• Tribal organizations across the state/in the region as economic drivers• Collaboration with neighboring Interior Alaska communities around key industries (tourism, mining, transportation)• Federal, state and local collaboration to solve key issues such as housing, air quality	<ul style="list-style-type: none">• Expanded rail access seasonally, and increased rail connectivity within the region and to the rest of North America• Federal funding opportunities such as American Rescue Plan, COVID-19 relief funds, Infrastructure Investment and Jobs Act and more

“Tribes are huge economic drivers.”

-Stakeholder Interview

“Calling the landmark bill one of the most ‘consequential’ pieces of legislation in her Senate career, Murkowski said the legislation addresses major gaps in Alaska’s core infrastructure. There are funds to build roads, fix bridges...”

-Fairbanks Daily News-Miner article on the Infrastructure Investment and Jobs Act, Nov. 7, 2021

Threats

What are threats to regional improvement or progress?



Chena Lakes Flood Control Project

NATURAL RESOURCES	ENVIRONMENTAL RISKS	UNCERTAINTY
<ul style="list-style-type: none">• Oil and gas pricing fluctuations• Federal policies that stymie resource development (especially oil and gas)• Reliance on coal, and potential for carbon pricing on coal	<ul style="list-style-type: none">• Environmental impacts from mining• Climate change• Wildfire risk• Air quality and designation as Environmental Protection Agency (EPA) nonattainment area	<ul style="list-style-type: none">• State budget challenges, uncertainty; further cuts at UAF• Risk of overbuilding to meet short-term military demands• Pandemic uncertainty and ongoing negative impacts on health care, supply chains, childcare

Sneak Peak of Detailed SWOT: Organized by Cluster/Influencer

	Cluster/Influencer													
	General	Education & Research	Energy	Healthcare	Military	Natural Resources	Visitor Industry	Communications	Government	Housing & Land Use	Quality of Life	Transportation	Utilities	Workforce Dev
OPPORTUNITIES														
Strategic Arctic location presents military, tourism, transportation and governance opportunities	X	X		X		X		X			X			
F-35 Beddown and KC-135 expansion				X					X				X	
Continue to build out/diversify housing stock				X					X					
Clear officially changed to Clear Space Force Station				X										
Eielson identified as site for 1st Air Force micro nuclear reactor		X		X								X		
AK Aerospace sector - e.g., Poker Flat Research Range	X			X								X		

Sneak Peak of Detailed SWOT: Organized by Source

Count by Source

OPPORTUNITIES

	Background data	Previous CEDS	Midnight Sun	Golden Days	State Fair	Literature Review	Roundtable(s)	Interview(s)	EDC Meeting	News articles	Other (what)	COUNT
Strategic Arctic location presents military, tourism, transportation and governance opportunities	1	1			2	1	2	1	4	3	15	
F-35 Beddown and KC-135 expansion	1	1					2			1	5	
Continue to build out/diversify housing stock							1	1			2	
Clear officially changed to Clear Space Force Station							1		1		2	
Eielson identified as site for 1st Air Force micro nuclear reactor									1		1	
AK Aerospace sector - e.g., Poker Flat Research Range										1	1	

Situational Assessment Contents

- Reflection on the 2016 CEDS

- Lessons learned (pages 1-2)

For example:

- Shorter and more graphic document
- Prioritize private sector and industry participation
- Updated strategies

- Key changes since 2016 (pages 2-3)

For example:

- F-35s, KC-125s at Eielson AFB
- Global pandemic
- Air quality concerns & regulations
- Growing Arctic opportunities

- Location quotient analysis (pages 4-8)

Location Quotient Analysis

- Uses a ratio, or quotient, to **compare shares of employment** in specific industries across regions of different sizes.
- Can tell us which industries are **specialized** in an economy and help us understand the region's unique characteristics.
- Can also inform economic development planning by showing which industries are **growing/shrinking** relative to other locations.

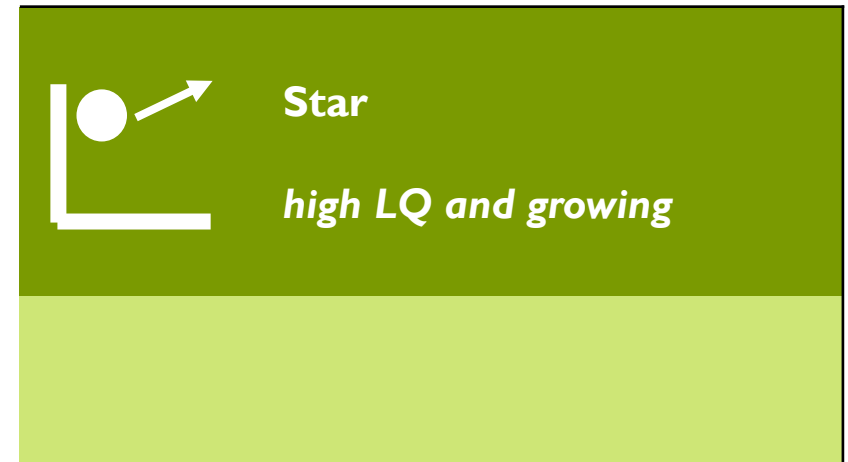
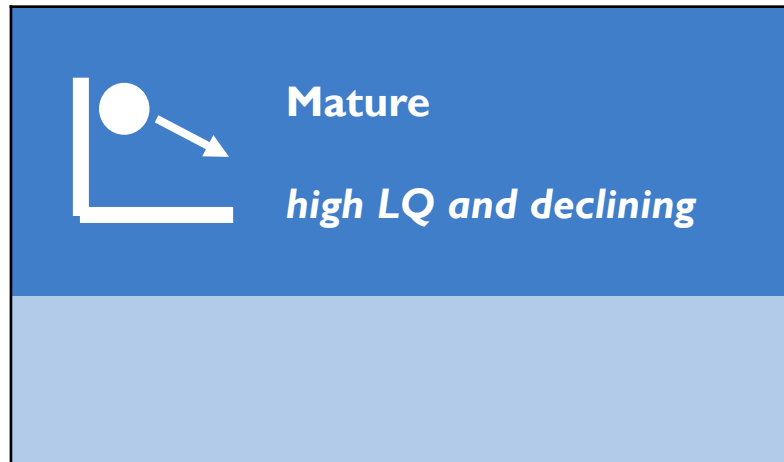
Source for all LQ data: U.S. Bureau of Economic Analysis (2021)

Location Quotient – What the #s Mean

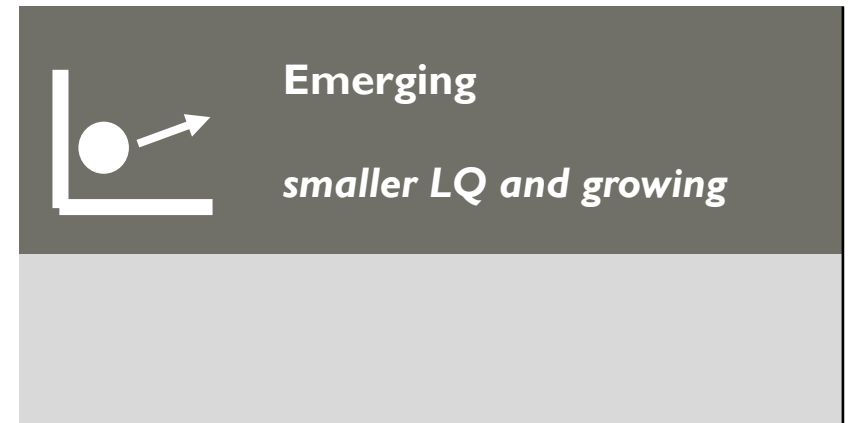
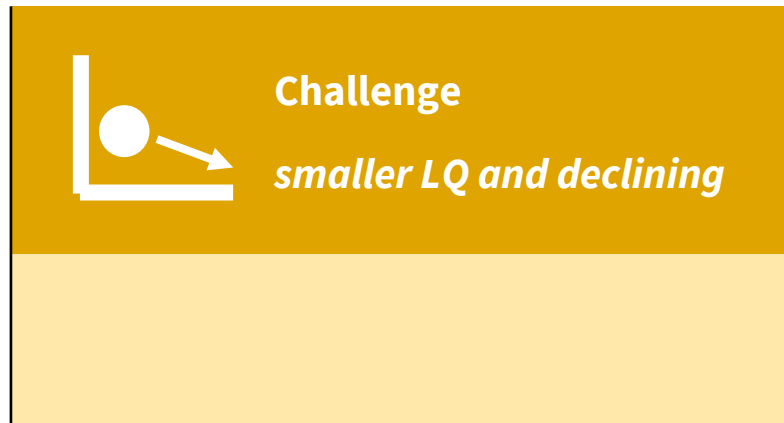
Location Quotient (LQ) Value	What it Means	Example
$LQ > 1$	The location employs a higher share of its workforce in that industry compared to the reference region.	FNSB mining, quarrying, and oil and gas extraction compared to U.S.: LQ of 4.00
$LQ = 1$	An LQ of 1 means a region employs a similar share of its workforce in that industry when compared to the reference region.	FNSB retail sector compared to Alaska: LQ of 1.02
$LQ < 1$	An LQ lower than 1 means the location employs a smaller share of its workforce in that industry compared to the reference region.	FNSB finance and insurance sector compared to U.S.: LQ of 0.33

FNSB Location Quotients for Specialized Industries – Summary Matrix (compared to U.S.)

High LQ
= 2.00 +
(2019)



Smaller
LQ =
between
1.00 –
2.00
(2019)

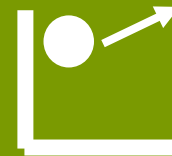


Declining = LQ shrunk between 2015 and 2019, so the industry is becoming less concentrated compared to overall U.S. employment

Growing = LQ grew between 2015 and 2019, so the industry is becoming more concentrated relative to overall U.S. employment

FNSB Location Quotients compared to U.S.

High LQ
= 2.00 +
(2019)



Star

high LQ and growing

Military (16.35, 8.3%)

Mining (4.00, 6.8%)

Federal Civilian (3.79, 10.6%)

Utilities (2.43, 6.8%)

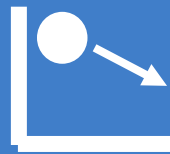
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Mature

high LQ and declining

State Government (2.91, -6.8%)



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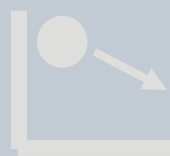
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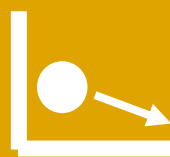
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LQ =
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Challenge

smaller LQ and declining

Construction (1.09, -18.4%)

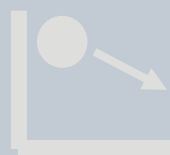
Transportation/Warehousing (1.03, -11.1%)

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FNSB Location Quotients compared to U.S.

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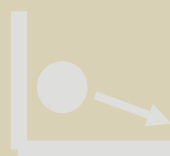
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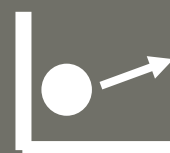


Challenge

smaller LQ and declining

Construction (1.09, -18.4%)

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Emerging

smaller LQ and growing

Accommodation/Food Services (1.05, 6.5%)

Retail Trade (1.05, 6.3%)

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Alaska Region Location Quotients Compared to U.S.

Industry Sector	FNSB	Anchorage	Kenai Pen.	Mat-Su	Alaska
Military	16.35	6.40	1.54	1.84	5.88
Mining, quarrying, and oil and gas extraction	4.00	2.87	6.15	1.92	6.05
Federal civilian	3.79	2.89	0.79	0.40	2.29
State government	2.91	n/a	1.47	1.34	1.89
Utilities	2.43	1.18	2.37	1.84	1.76
Construction	1.09	0.88	1.10	1.93	0.94
Retail trade	1.05	1.04	1.18	1.42	1.03
Accommodation and food services	1.05	1.10	1.41	1.09	1.07
Transportation and warehousing	1.03	1.43	0.90	0.78	1.24
Arts, entertainment, and recreation	0.98	1.02	1.25	1.22	1.03
Health care and social assistance	0.90	1.21	1.00	1.13	1.03
Forestry, fishing, and related activities	0.79	1.19	12.05	3.37	4.77
Real estate and rental and leasing	0.70	0.92	0.96	1.08	0.82
Other services	0.67	0.80	0.94	1.15	0.80
Local government	0.64	n/a	1.38	1.17	1.18
Professional, scientific, and technical services	0.62	0.96	0.59	0.68	0.72
Administrative, support and waste management	0.51	0.75	0.49	0.55	0.62
Farm employment	0.49	0.00	0.58	1.18	0.25
Information	0.48	1.07	0.64	0.98	0.82
Educational services	0.47	0.58	0.50	0.84	0.54
Wholesale trade	0.41	0.82	0.32	0.23	0.52
Finance and insurance	0.33	0.69	0.38	0.54	0.48
Management of companies and enterprises	0.27	0.74	0.14	0.22	0.56
Manufacturing	0.23	0.21	0.62	0.29	0.52

Industries w/LQ
over 1 in FNSB =
more specialized
than U.S.

Industries w/LQ
under 1 in FNSB =
less specialized
than U.S.

Industry Sector	FNSB	Anchorage	Kenai Pen.	Mat-Su	Alaska
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High military LQs statewide, but especially in FNSB

Mining in FNSB is more concentrated than U.S., but less than Alaska overall

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Tourism hard to see in this data since it's spread across categories

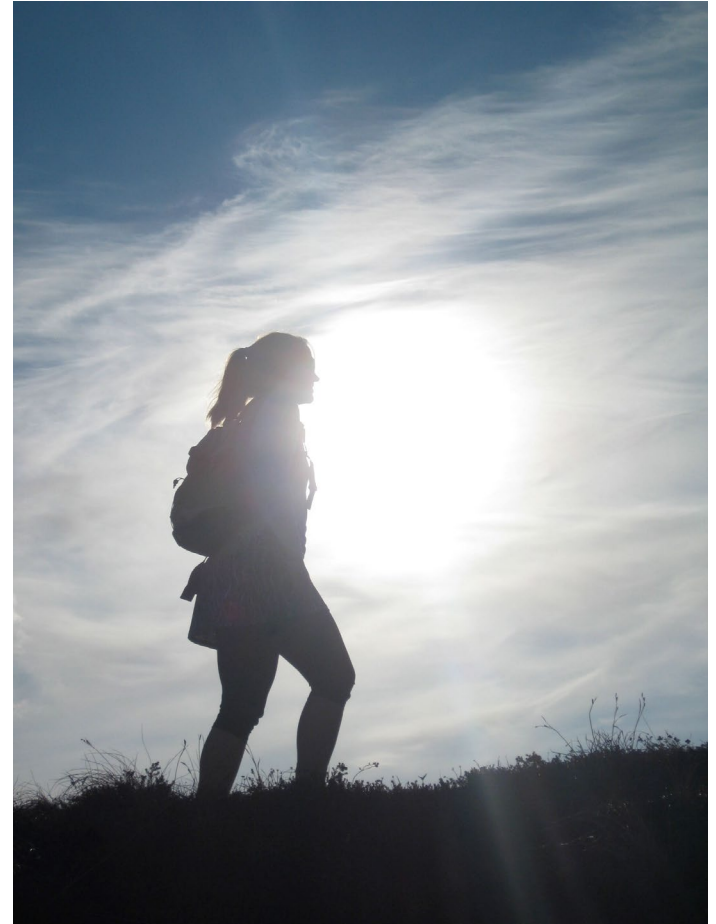


Draft Vision and Goals

Reminder: What is a vision?

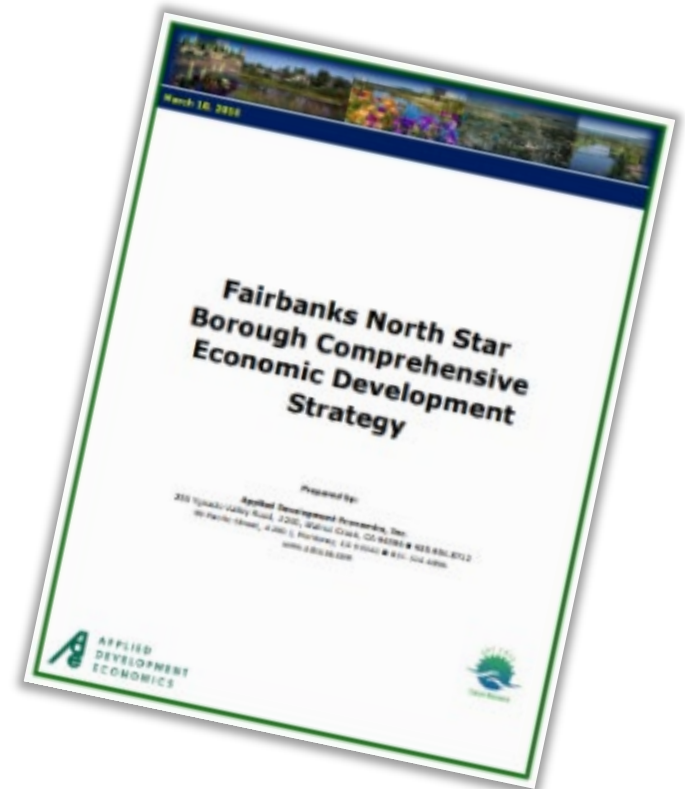
A vision statement identifies what we are working toward.

Where do we want to be in 5, 10, 20 years?



2016 FNSB CEDS Vision

To improve the FNSB residents' quality of life and standard of living by developing goals, establishing objectives and implementing strategies that sustain, enhance or increase economic and social opportunities for local residents.



What are some example visions?

Northern Opportunity (statewide CEDS) Vision:

Alaska will have a stable and sustainable economy that generates quality jobs, capital investment, and new revenue to benefit the people and businesses of Alaska.

Southeast Conference Vision:

Promote strong economies, healthy communities, and a quality environment in Southeast Alaska.

Southwest Alaska Municipal Conference Vision:

Vibrant, connected, and sustainable communities for Southwest Alaska.

Kenai Peninsula Borough CEDS “Overarching Goal”:

High Quality of Place and High Quality of Life

Example vision – from our region

Salcha-Badger Road Area Plan Vision

The Salcha-Badger Road area is comprised of communities in the Fairbanks North Star Borough renowned for their:



FNSB Economy in the News: Highlights

June 2021 Work Session Activity: It's 5 years from now. There is a story about the FNSB economy in the news. What is the headline? What do you want it to say? (Sample headlines from the group exercise)

- “FNSB ranked in top 10 places to live in the U.S.”
- “The golden heart of Alaska has found the golden goose: Fairbanks, America’s Arctic, has an economy that’s heating up with a surprisingly low unemployment, diverse opportunities and the global home to the Arctic Council”
- “Fairbanks is the fastest-growing economy in Alaska and the Pacific Northwest”
- “Fairbanks named the Arctic hub community for the U.S.”

Repeated Vision Words from EDC, Community

Affordable

Arctic

Community

Culture

Diversified

Family

Global

Growth

Healthy

Hub

Local

Nature

Opportunity

Outdoors

Secure

Skilled

Small Town

Sustainable

Thriving

Proposed Vision Statement – Some Ideas

1. FNSB is the cultural, economic, and adventure hub for Interior Alaska
2. FNSB is a place where businesses, families, and opportunities thrive
3. A vibrant, diversified economy thriving in the land of the midnight sun
4. A thriving, globally-relevant economic hub in the golden heart of Alaska
5. FNSB is celebrated for its growing and diversified economy, supported by innovative and hardworking residents who cherish the treasures of Interior Alaska

What parts of these statements do you like most?

Draft Goals

- Draft goals are coming soon – we are still finalizing outreach with key industry sectors
- Will be shared and refined at the Economic Summit, along with emerging strategy ideas

Emerging Goals

EDC Responses to, “What does economic success in Fairbanks look like? What are tangible goals for the next five years?”

- There is such thing as unhealthy growth, so success would be **healthy and sustainable growth**.
- **Increasing and diversifying local exports**, so if one large employer leaves, we are not as impacted.
- **Better food security** and being able to produce more food locally.
- A **deep skilled labor pool** for existing industry sectors.
- **Universal Pre-K, in addition to affordable and available childcare**. This is an investment in the start of the workforce pipeline and future economy.
- **Lower energy and living costs.**



Economic Summit

2022 Interior Alaska Economic Summit



DRAFT Save the Date: Month, Date, 2022

2022 Interior Alaska Economic Summit

The 2022 Interior Alaska Economic Summit will bring regional community, business, and industry leaders together to collaborate on economic opportunities as we work towards a stronger, more resilient Interior Alaska economy. The Summit is **free** and a **virtual event** (join us from anywhere!).

Agenda

Morning

9:00 am - 12:00 pm

- Opening Plenary
- Industry-Specific Sessions

Afternoon

1:30 pm - 4:00 pm

- Influencer-Specific Sessions
- Closing Plenary

RSVP Today



More details coming soon.

RSVP and stay informed:

www.surveymonkey.com/r/IAEconSummit

Topics for Breakout Sessions



Draft Flyer

PURPOSE & OUTCOMES

- The 2022 Interior Alaska Economic Summit will inform development of the updated 5-Year Fairbanks North Star Borough Comprehensive Economic Development Strategy (CEDS).
- Participants will review and confirm CEDS components, including a shared economic development vision, goals, and 5-year priorities.
- The updated CEDS will better position the community for funding & investment opportunities.

Questions, comments? Contact us:

Brittany Smart, Fairbanks North Star Borough, 907-459-1302 (direct), 907-328-8027 (call or text), brittany.smart@fnsb.gov
Shelly Wade, Agnew::Beck Consulting, 907-242-5326 (call or text), shelly@agnewbeck.com

Learn More about the CEDS at www.FNSBCEDS.com

2022 Interior Alaska Economic Summit



Will bring regional
community, business,
and industry leaders
together

To collaborate on
economic
opportunities

Toward a stronger,
more resilient Interior
Alaska economy.

The Summit will be free and a virtual event

Proposed Agenda

Morning

9:00 am -
12:00 pm

- Opening Plenary
- Industry-Specific Sessions

Education & Research

Energy

Healthcare

Military

Natural Resources (Agriculture, Forestry, Mining)

Visitor Industry

Afternoon

1:30 pm -
4:00 pm

- Influencer-Specific Sessions
- Closing Plenary

Communications

Government

Housing and Land Use

Quality of Life

Transportation

Utilities

Workforce Development

Proposed Date

Thursday,
January 27,
2022

Thoughts? Concerns?



DRAFT Save the Date: Month, Date, 2022

2022 Interior Alaska Economic Summit

The 2022 Interior Alaska Economic Summit will bring regional community, business, and industry leaders together to collaborate on economic opportunities as we work towards a stronger, more resilient Interior Alaska economy. The Summit is **free** and a **virtual event** (join us from anywhere!).

Agenda

Morning

9:00 am - 12:00 pm

- Opening Plenary
- Industry-Specific Sessions

Afternoon

1:30 pm - 4:00 pm

- Influencer-Specific Sessions
- Closing Plenary

RSVP Today



More details coming soon.

RSVP and stay informed:

www.surveymonkey.com/r/IAEconSummit

Topics for Breakout Sessions



PURPOSE & OUTCOMES

- The 2022 Interior Alaska Economic Summit will inform development of the updated 5-Year Fairbanks North Star Borough Comprehensive Economic Development Strategy (CEDS).
- Participants will review and confirm CEDS components, including a shared economic development vision, goals, and 5-year priorities.
- The updated CEDS will better position the community for funding & investment opportunities.

Questions, comments? Contact us:

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Learn More about the CEDS at www.FNSBCEDS.com

Economic Summit Outreach Ideas

- Project website
- Local calendars (including Chamber)
- Social media
- Emails to distribution list
- Fairbanks Daily News-Miner
- Radio
- *Invite industry leaders, neighboring regions, Tribes, other ARDORS, Economic Development Administration*

Next Steps

Upcoming Activities

Roundtables

- Young Entrepreneurs
- Education & Workforce Development
- Energy (with FEDCo)
- Mining (with FEDCo)
- Forestry (with FEDCo)
- Healthcare (with FEDCo)
- Communications (with FEDCo)

Other Engagement

- Meet with Fairbanks and North Pole City Councils
- Association of General Contractors
- UAF Student engagement (Wood Center?)
- Complete interviews (EDC, Tribal organizations, Interior Alaska Builder's Association, Alaska Marijuana Industry Association, Downtown Association of Fairbanks)
- Economic Summit

Next Steps

- November – December 2021: Draft vision
- November – December 2021: Conclude sector outreach
- **January/February 2022 – Economic Summit**
- April 2022 – Release public review draft
- June 2022 – Release final draft

Thank you!

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Happy
Thanksgiving!

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