



Fairbanks North Star Borough Comprehensive Economic  
Development Strategy (CEDS)

# **Interior Alaska Economic Summit**

Opening Plenary, February 22, 2022

Westmark Hotel & Conference Center & Zoom

# Land Acknowledgement

We recognize Alaska Native Tribes as the traditional stewards of this land and acknowledge the enduring relationship that exists between Alaska Native People and their traditional territories.

# Special Thanks To:

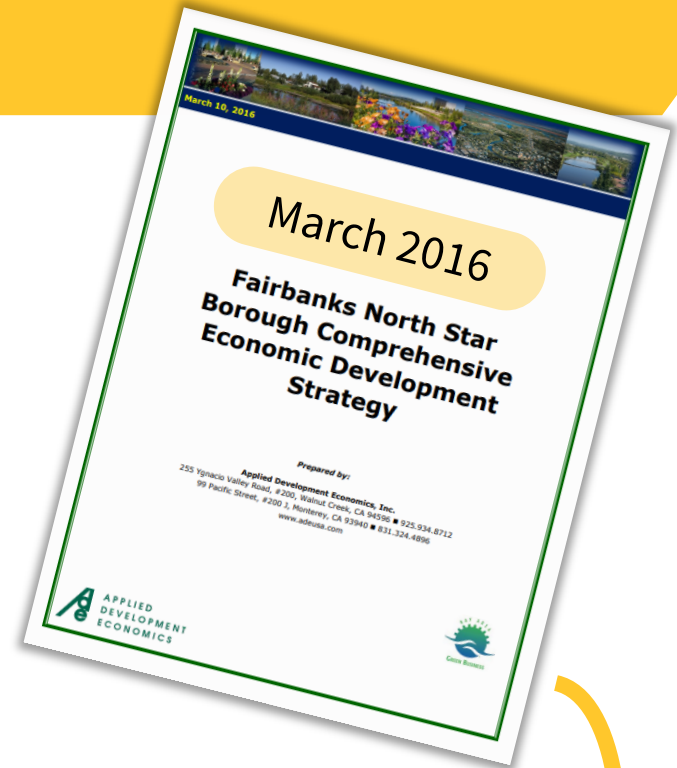
- **Fairbanks Economic Development Corporation** and **The Greater Fairbanks Chamber of Commerce** for helping facilitate breakouts
- **Explore Fairbanks** for providing us with supplies
- The **Westmark** for hosting us
- The **FNSB and Interior AK community, visitors and other partners** that have contributed to the process since we began in spring 2021

# Setting the Stage

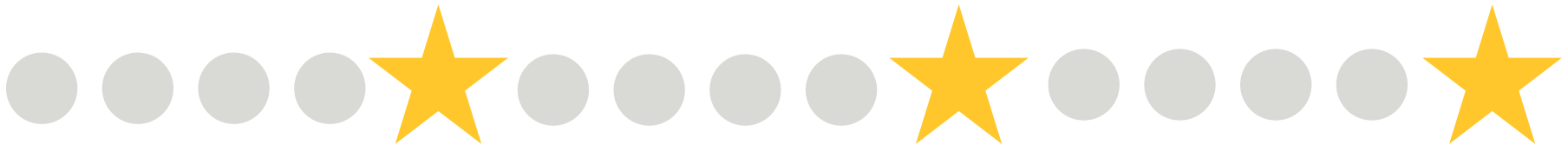
Fairbanks North Star Borough CEDS Project Manager  
Brittany Smart

# Project Purpose

**To develop an updated Five-Year FNSB Comprehensive Economic Development Strategy (CEDS).**



CEDS must go through a robust update every five years, with shorter, less intensive updates annually.



# What is a CEDS?

- **A locally-based, regionally-driven economic development roadmap** that guides government and community action.
- 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

# The Project Team

## FNSB Economic Development Commission



*Mayor Bryce Ward | Abigail Riggs | Frank Tomaszewski  
Kristan Kelly | Mark Billingsley | Paul Robinson | Russell Talvi*

*Past Members: Deb Hickock, Matt Cooper, Mike Meeks, Mindy O'Neall*

## FNSB Project Manager

Brittany Smart

### Contracting Team:

Shelly Wade, AICP  
Molly Mylius



Supporting team  
members:



# What does FNSB look like today?

## *Place*

- FNSB: Interior AK Hub
- Over 7,000 square miles
- Alaska's 2<sup>nd</sup> largest borough

Key regional partners beyond FNSB boundaries include:

- Denali Borough, North Slope Borough
- Communities of Anderson, Delta Junction, Nenana, Tok
- Tanana Chiefs Conference and other Tribal organizations

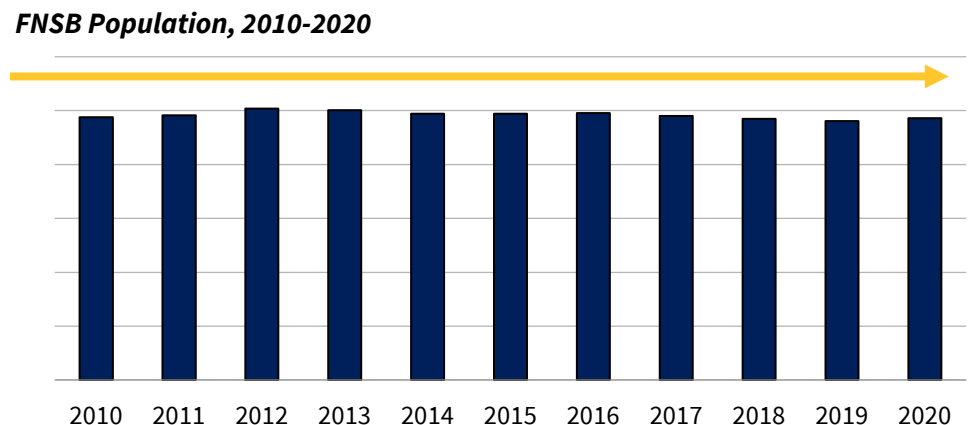
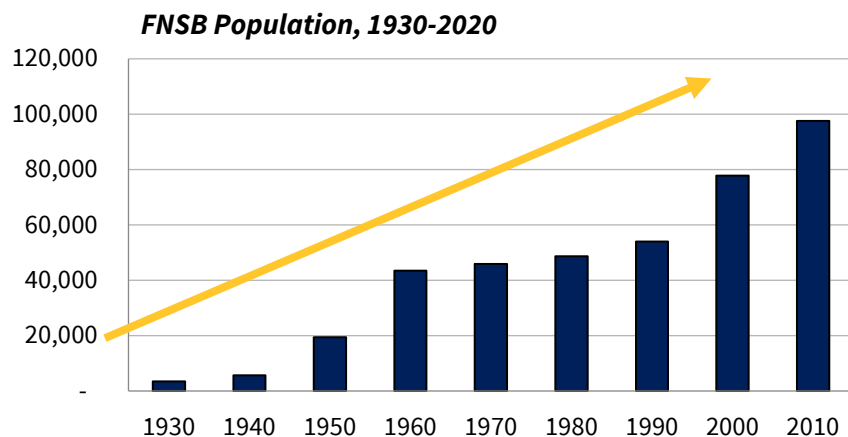




# What does FNSB look like today?

## *People*

- **Migration** – More transitory than the state overall, with over 15,000 people moving into or out of the Borough annually
- **Education** – Nearly 1/3 of residents have a bachelor's degree or higher
- **Population** – Experienced rapid growth between 1950 and 2010; since 2010, population has remained steady



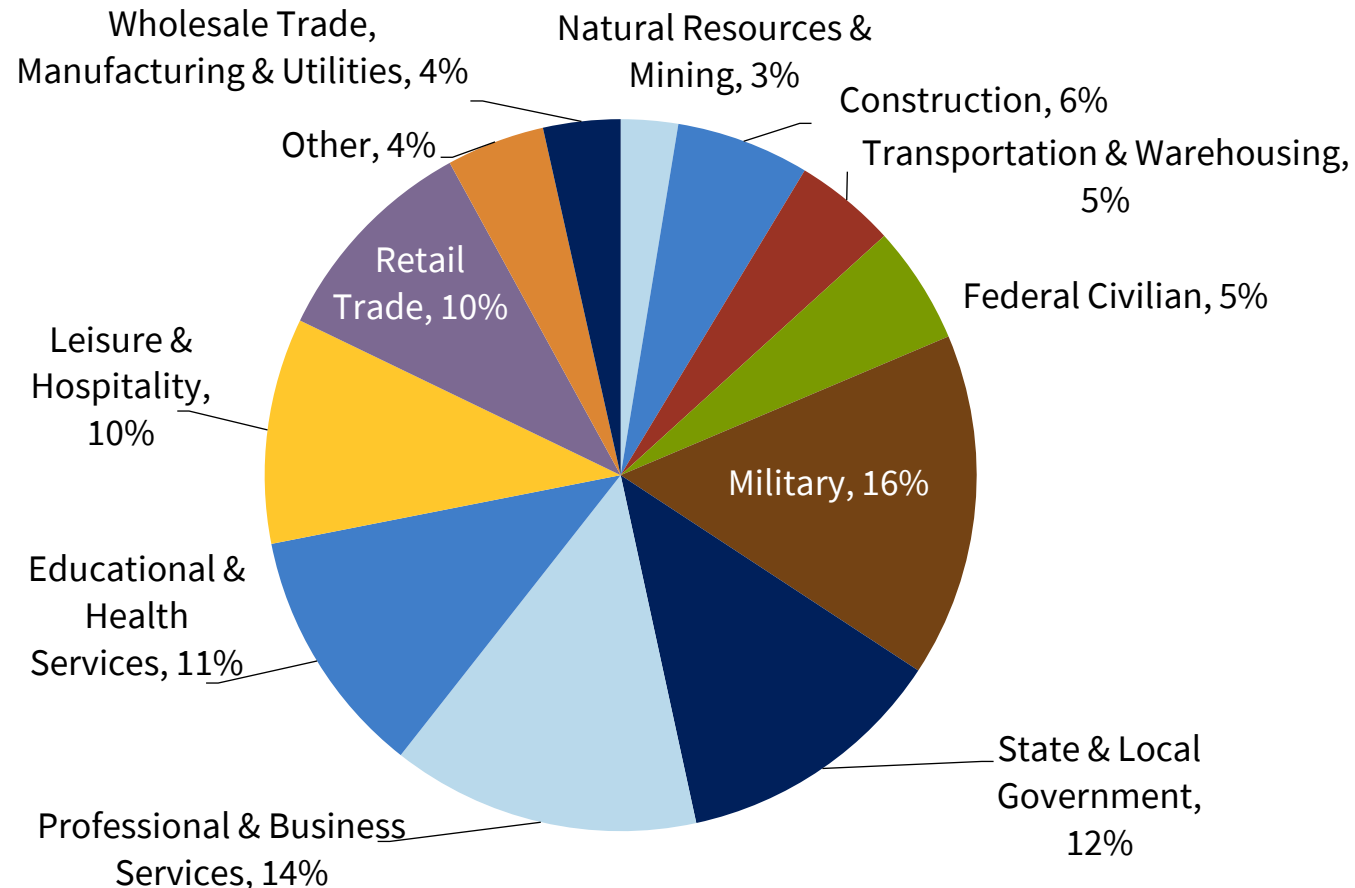
Source: 1930-2020 Alaska Department of Labor and Workforce Development, Research and Analysis section

# What does FNSB look like today?

## *Economy*

- **Hub** for over 40 Interior Alaska communities.
- **Diverse** economy.
- The **military** is the FNSB's largest employer

### FNSB Employment by Industry



# What does FNSB look like today?

## ***Major Economic Impacts***

### **COVID-19**

- Relatively high unemployment rate and job losses
- Leisure & Hospitality most impacted
- Federal investment in local recovery – CARES Act, ARPA, and Build Back Better



### **Military**

- F-35 Beddown and four additional KC-135s at Eielson Air Force Base
- Quality of life investments on Ft. Wainwright
- Military families stay after service; 12% of businesses are veteran-owned
- Meeting housing need for military growth

### **State and Federal Changes**

- State of Alaska lacks a comprehensive fiscal plan
  - Deep cuts to UAF and local municipalities
- Infrastructure Investment and Jobs Act

# Learn More – See Regional Snapshot





**STRONGER. THRIVING. MORE RESILIENT.**

**Fairbanks North Star Borough *Comprehensive Economic Development Strategy (CEDS) Update*** February 2022


Our world is changing. We are updating the FNSB's 2016 economic development strategy to respond to change and prepare for the future.

**What does FNSB look like today?**




**LOCATION**

- Over 7,000 square miles – Alaska's 2<sup>nd</sup> largest borough
- Northern location presents Arctic opportunities




**ECONOMIC HUB**

- The region offers healthcare, jobs, education, and retail services, supporting over 40 Interior Alaska communities




**EMPLOYMENT**

- Higher concentrations of military, mining, utilities, and civilian government employment than the U.S. overall




**EDUCATION**

- Nearly 1/3 of residents have a bachelor's degree or higher
- Home to the University of Alaska Fairbanks



**PEOPLE**







- More transitory than the state overall, with over 15,000 people moving into or out of the Borough annually



**COST OF LIVING**

- A higher cost of living than the U.S. average
- Slightly higher than Anchorage

**What factors are impacting the FNSB economy?**

<p><b>Population</b></p>  <p>97,581 (1950) 97,159 (2010)</p> <ul style="list-style-type: none"> <li>• Experienced rapid growth between 1950 and 2010.</li> <li>• Since 2010, population has remained steady.</li> <li>• While population has stayed flat, high numbers of residents migrate into and out of FNSB every year.</li> </ul>	<p><b>State Finances</b></p>  <ul style="list-style-type: none"> <li>• The State of Alaska lacks a comprehensive fiscal plan.</li> <li>• Over the past several years there have been deep cuts to UAF and local municipalities.</li> </ul>	<p><b>Workforce</b></p>  <ul style="list-style-type: none"> <li>• FNSB has a higher labor force participation rate (72%) than the state average, and a low unemployment rate compared with other Alaska regions.</li> </ul>	<p><b>Military</b></p>  <p>F-35s KC-135s</p> <ul style="list-style-type: none"> <li>• The arrival of F-35 fighter jets at Eielson Air Force Base (EAFB) is bringing over 3,000 new residents.</li> <li>• EAFB will also see 4 additional KC-135 tankers and up to 220 new personnel.</li> <li>• Many military households remain in FNSB after discharge; 12% of businesses are veteran owned.</li> </ul>
<p><b>Pandemic</b></p>  <p>Peak unemployment: 12.4%</p> <ul style="list-style-type: none"> <li>• Unemployment rate reached a high of 12.4% in April 2020.</li> <li>• Leisure &amp; Hospitality saw the greatest pandemic-induced employment declines (loss of 1,600 jobs from 2019 to 2020).</li> </ul>		<p><b>Housing</b></p>  <p>New construction needed: ~100 units</p> <ul style="list-style-type: none"> <li>• Incoming EAFB personnel need housing.</li> <li>• FNSB saw an increase in new housing construction from 2017-2020 but progress has slowed due to multiple factors including high lumber costs. The community is working together to meet the need.</li> </ul>	

**How can we grow and sustain our economy?**  
**The CEDS will look at key components of the FNSB economy such as:**

**Industry Clusters**

*Key sectors that drive the FNSB economy*

- ❖ Agriculture
- ❖ Energy
- ❖ Forestry
- ❖ Health Care
- ❖ Mining
- ❖ Research & Innovation
- ❖ Visitor Industry

**Community Influencers**

*Supportive foundations needed to grow and flourish*

- ✓ Business Development & Entrepreneurship
- ✓ Communications (phone, internet)
- ✓ Education & Workforce Development
- ✓ Land Use, Housing, & Environment
- ✓ Recreation & Entertainment
- ✓ Transportation

[\*\*www.FNSBCEDS.com\*\*](http://www.FNSBCEDS.com)

# Relevant Planning Efforts

Completed	
Interior Alaska COVID-19 Economic Impact and Recovery Plan (2021)	<a href="https://covid-fnsb.hub.arcgis.com/">https://covid-fnsb.hub.arcgis.com/</a>
Tanana Chiefs Conference CEDS (2021)	<a href="http://www.tananachiefs.org/ceds/">www.tananachiefs.org/ceds/</a>
Salcha-Badger Road Area Plan (2019)	<a href="http://salchabadgerplan.com/">http://salchabadgerplan.com/</a>
Eielson Regional Growth Plan (2018)	<a href="http://www.eafbregionalgrowth.com/">http://www.eafbregionalgrowth.com/</a>
FNSB Regional Comprehensive Plan (2005)	<a href="https://www.co.fairbanks.ak.us/">https://www.co.fairbanks.ak.us/</a>
In Progress	
Northern Opportunity: Statewide CEDS	<a href="http://northernopportunity.com/">http://northernopportunity.com/</a>
FNSB Comprehensive Roads Plan	<a href="http://fnsbroadspan.com/">fnsbroadspan.com/</a>
Fairbanks Downtown Plan	<a href="https://downtownfbx2040.com/">https://downtownfbx2040.com/</a>
FNSB Comp Recreational Trails Plan	<a href="http://fnsbtrailsplan.com/">fnsbtrailsplan.com/</a>
Pioneer Park Master Plan	<a href="http://fairbankspioneerparkplan.com/">fairbankspioneerparkplan.com/</a>

# Purpose & Structure of the Summit

Agnew::Beck Project Manager  
Shelly Wade

# Agenda

## Tuesday, February 22<sup>nd</sup> – Focus on Industry Clusters

Time	Topic	
8:30 – 9:00 am	Continental breakfast	
9:00 – 9:45 am	<b>Opening Plenary:</b> Welcome and Inspiration – <i>Virtual option available</i>	
9:45 – 10:00 am	Break	
10:00 – 11:45 am	<b>Industry Breakouts Round 1</b>	Agriculture
		Energy
11:45 am – 1:00 pm	Lunch – on your own	
1:00 – 2:45 pm	<b>Industry Breakouts Round 2</b>	Forestry
		Health Care
2:45 – 3:00 pm	Break	
3:00 – 5:00 pm	<b>Industry Breakouts Round 3</b>	Mining
		Research & Innovation
		Visitor Industry

## Wednesday, February 23<sup>rd</sup> – Focus on Community Influencers

Time	Topic	
8:30 – 9:00 am	Continental breakfast	
9:00 – 10:45 am	<b>Influencer Breakouts Round 1</b>	Small Business Development & Entrepreneurship
		Communications (phone, internet connectivity)
10:45 – 11:00 am	Break	
11:00 am – 12:45 pm	<b>Influencer Breakouts Round 2</b>	Land Use, Housing, & Environment (includes utilities)
		Recreation & Entertainment (includes retail, parks, trails)
12:45 – 1:45 pm	Lunch – on your own	
1:45 – 3:30 pm	<b>Influencer Breakouts Round 3</b>	Education & Workforce Development
		Transportation (includes roads, aviation, rail, bike/pedestrian connections)
3:30 – 4:00 pm	Break	
4:00 – 5:00 pm	<b>Closing Plenary:</b> Summary of Results and Next Steps – <i>Virtual option available</i>	

Sample  
Guiding  
Questions  
for the  
Summit

1. What did we get **right**?
2. What would you **change**?
3. What is **missing**?
4. What is **most important**?



# Proposed Economic Vision

- A vision statement tells us what we want our future economy to look like and what we're working toward.
- We have a proposed economic vision statement and want your input!



**Interior Alaska – In 5, 10, 15 years...**

*The **Land of the Midnight Sun & Golden Heart of Alaska** is a global economic hub, where families, businesses, adventurers, and opportunities **thrive**.*

# One-Pagers

## 2022-2026 Fairbanks North Star Borough Comprehensive Economic Development Strategy (CEDS)

### Mining Cluster Summary - DRAFT

Includes: Strengths, Weaknesses, Opportunities, Threats | Targets | Goals | Strategies & Actions | Relevant Plans

#### Strengths Internal attributes that contribute to success

- Three of Alaska's largest mining operations (Ugblu, Fort Knox, and Pogo) are within 150 miles of Fairbanks
- The University of Fairbanks mining program supports industry workforce needs
- Mining company contributions to the community, including event sponsorships and UAF programs
- Interior Alaska mines have a history of responsible operations, with no major recent events
- Fort Knox contributes millions in property taxes annually to the FNSB (\$11.1 million in 2020)

#### Weaknesses Internal barriers to success

- There is a lack of infrastructure for potential mining operations
- The cost of exploration is higher than in other states
- Poor public perception of mining and understanding of what modern mining entails
- Mining companies often end operations during the permitting phase

#### Opportunities External forces that contribute to success

- Potential future mining extraction projects in Interior Alaska such as the ~~Ugblu~~ **Ugblu** Project (owned by Kinross) and the ~~Fort Knox~~ **Fort Knox** and ~~Ester Dome~~ **Ester Dome** (Felix Gold Limited)
- Increasing global demand for rare earth minerals
- Alaska's reputation as a mineral source is increasing
- Road systems through the Brooks Range and Ambler Mining District in planning phases
- Green technology is reliant on minerals

#### Threats External forces that contribute to success

- Federal policies that restrict mining operations
- Negative environmental impacts
- Public perception of mining and understanding of what modern mining entails
- The publicity damage to other projects
- Increasing skill requirements

Where We Are	What measurements can we use to track progress? Where do we want to be in 5 years?
<b>\$1.9 billion</b> (2020)	<b>Mineral Value</b> - Export value of minerals being mined in Alaska recently surpassed Florida to be the sixth highest in the nation
<b>3 Mines</b> (2020)	<b>Producing Mines</b> - How many major deposits permitting to operation in Interior Alaska The Interior has three active mines and two more in development
<b>1,293 Jobs</b> (2019)	<b>Employment</b> - Number of FNSB residents working in mining, quarrying, and oil and gas jobs This number has decreased by almost 50% since 2014

Sources for export value comes from Alaska Department of Commerce, Community and Economic Development

## 2022-2026 Fairbanks North Star Borough Comprehensive Economic Development Strategy (CEDS)

### Health Care Cluster Summary - DRAFT

Includes: Strengths, Weaknesses, Opportunities, Threats | Targets | Goals | Strategies & Actions | Relevant Plans

#### Strengths Internal attributes that contribute to success

- FNSB is a health care hub, serving both the FNSB and other Interior Alaska communities
- FNSB is home to quality health facilities including Fairbanks Memorial Hospital and Chief Andrew Isaac Health Center
- Telehealth has been successfully used to increase access to health care and fill priority needs, including expanding access to behavioral health care

#### Weaknesses Internal barriers to success

- Duplication of technology that results in underutilization
- FNSB has limited public health authority
- Medicaid and Medicare billing rates are too low to cover costs
- Military families have high behavioral health needs associated with transitions and the stressful nature of their work, and DoD sometimes struggles to maintain sufficient behavioral health staffing capacity
- Insufficient for persons experiencing homelessness are and retaining out-of-town health care workers

#### Opportunities External forces that contribute to success

- Continued improvements to telehealth technology
- Crisis Now model offers new ways of responding to people in crisis in FNSB, creating more effective, efficient methods that will also free up public safety resources and create new job opportunities
- Fort Wright conducted a Behavioral Health Epidemiological consultation (BH EPICON) in response to a series of suicides in the Fort Wright community; the EPICON identified recommendations to improve moral and quality of life for troops

#### Threats External forces that contribute to success

- COVID-19 and ongoing impacts to health, travel, workers with other workforce shortages mean FNSB is competing for program funding
- State budget cuts threaten health care and social service program funding

Where We Are	What measurements can we use to track progress? Where do we want to be in 5 years?
<b>#6</b> (2018)	<b>Health Outcomes Ranking</b> , out of 25 Alaska boroughs/census areas Based on a set of indicators including premature death rate, number of residents reporting poor physical and mental health, and low birthweight
<b>160:1</b> (2020)	<b>Mental Health Providers</b> - Ratio of population to mental health care providers This is higher than the statewide ratio of 200:1, although stakeholder feedback indicates there are still not enough providers to meet the need

Other Potential Indicators (need baselines and targets): quality of care metrics; ratio of population to primary care providers; ratio of population to dentists or licensed dental staff  
Sources: Health Outcomes Ranking and Mental Health Providers comes from the County Health Rankings tool provided by the University of Wisconsin Population Health Institute with support from the Robert Wood Johnson Foundation

2026 Targets

#3

Need to ID

## 2022-2026 Fairbanks North Star Borough Comprehensive Economic Development Strategy (CEDS)

Includes: Strengths, Weaknesses, Opportunities, Threats | Targets | Goals | Strategies & Actions | Relevant Plans

#### Strengths Internal attributes that contribute to success

- Fairbanks has seen growth in number of farms, farm sales, and farm employment
- FNSB is on the road system, making it easier to move equipment, supplies, and products
- Interior Alaska farmers are increasingly using innovative growing methods including high tunnels and geothermal heating
- UAF's Fairbanks Experiment Farm supports agricultural research and innovation that supports farmers

#### Weaknesses Internal barriers to success

- Alaska has a history of unsuccessful agricultural challenges securing seasonal labor force
- Disparity between agricultural and retail value
- Farm volunteers are not covered under worker's insurance in Alaska
- High costs for shipping materials to the region
- High export costs and logistical challenges
- High reliance on imported foods
- Short growing season

#### Opportunities External forces that contribute to success

- Alaska is emerging as a worldwide peony supplier
- Alaska approved by USDA to produce industrial hemp
- Alaska has the highest percentage of beginning farmers in the country (2017 Census of Agriculture)
- Due to climate change, the growing season is lengthening

#### Threats External forces that contribute to success

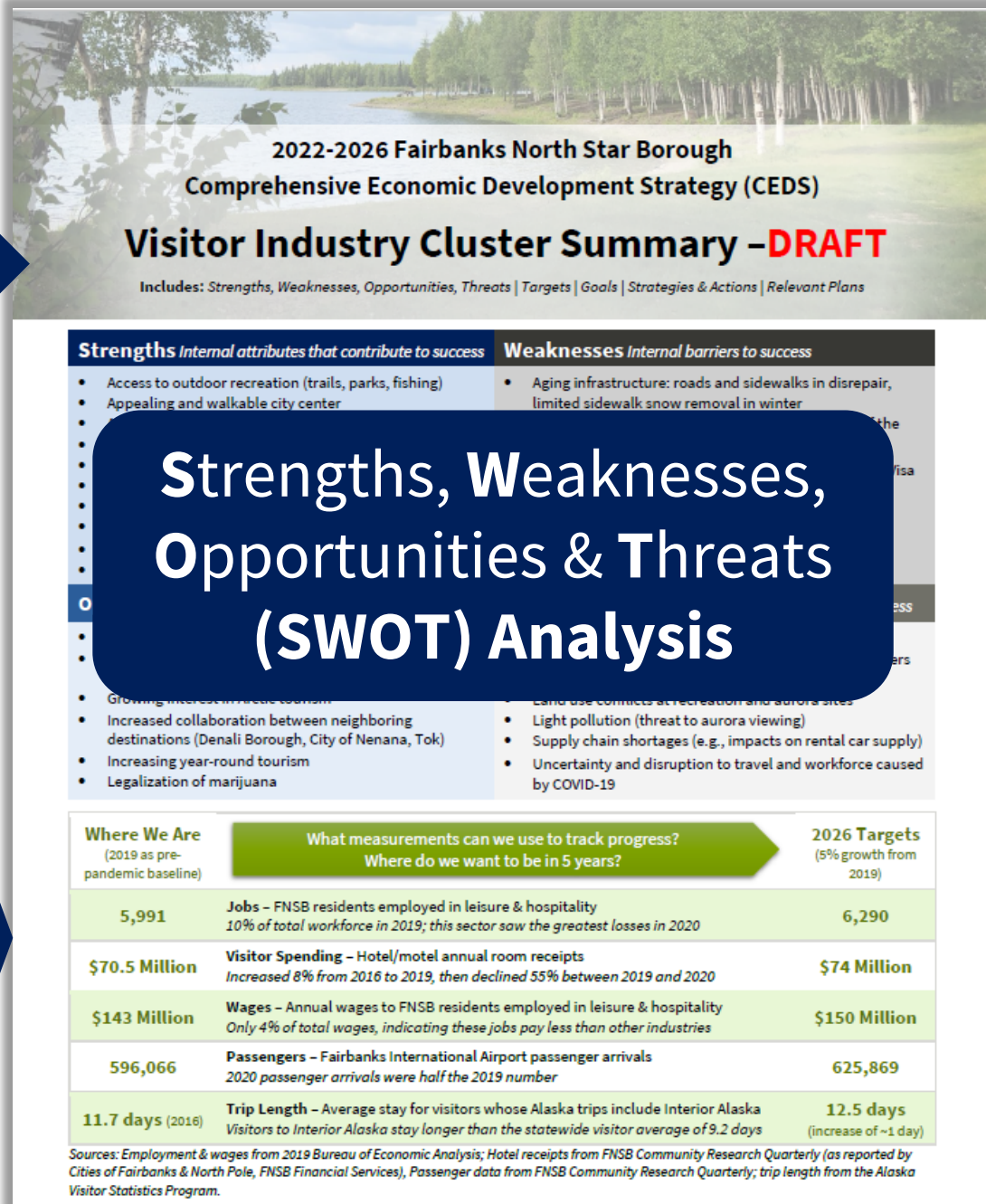
- Climate change
- Reliance on imported food and vulnerable to disruptions create major food security challenges
- Reduction in state funding for agricultural facilities

Where We Are	What measurements can we use to track progress? Where do we want to be in 5 years?
<b>274 Farms</b> (2017)	<b>Farms</b> - Total number of farms in Interior Alaska Out of 990 total in the state; increase of 26% from 2012
<b>\$10.4 M</b> (2017)	<b>Sales</b> - Total market value of agricultural products sold in Interior Alaska Up 14% from 2012; approximately 80% comes from crops, 20% from livestock/poultry
<b>285 Jobs</b> (2019)	<b>Employment</b> - Total number of full-time and part-time employment in the agriculture industry in FNSB Farm employment in FNSB increased 31% between 2014 and 2019
	<b>300 farms (2022), 330 farms (2027)</b>
	<b>\$11.4 M (2022), \$12.6 M (2027)</b>
	<b>315 Jobs (2026)</b>

Sources: Farms and Sales data come from the U.S. Department of Agriculture (USDA), Census of Agriculture, 2017; Interior Alaska includes the Fairbanks North Star Borough, Denali Borough, Yukon-Koyukuk Census Area and Southeast Fairbanks Census Area; Employment data comes from the Bureau of Economic Analysis, Total Full-Time and Part-Time Employment by Industry (release dates for future censuses)  
The USDA Census of Agriculture is only conducted once every five years, which is why these targets show years 2022 and 2027

# One-Pager Breakdown (Front)

## Title



**2022-2026 Fairbanks North Star Borough  
Comprehensive Economic Development Strategy (CEDS)**

**Visitor Industry Cluster Summary – DRAFT**

Includes: Strengths, Weaknesses, Opportunities, Threats | Targets | Goals | Strategies & Actions | Relevant Plans

<b>Strengths</b> Internal attributes that contribute to success	<b>Weaknesses</b> Internal barriers to success
<ul style="list-style-type: none"><li>• Access to outdoor recreation (trails, parks, fishing)</li><li>• Appealing and walkable city center</li></ul>	<ul style="list-style-type: none"><li>• Aging infrastructure: roads and sidewalks in disrepair, limited sidewalk snow removal in winter</li></ul>
<ul style="list-style-type: none"><li>• Growing interest in Arctic tourism</li><li>• Increased collaboration between neighboring destinations (Denali Borough, City of Nenana, Tok)</li><li>• Increasing year-round tourism</li><li>• Legalization of marijuana</li></ul>	<ul style="list-style-type: none"><li>• Land use conflicts at recreation and aurora sites</li><li>• Light pollution (threat to aurora viewing)</li><li>• Supply chain shortages (e.g., impacts on rental car supply)</li><li>• Uncertainty and disruption to travel and workforce caused by COVID-19</li></ul>

<b>Where We Are</b> (2019 as pre-pandemic baseline)	<b>What measurements can we use to track progress?</b> Where do we want to be in 5 years?	<b>2026 Targets</b> (5% growth from 2019)
<b>5,991</b>	<b>Jobs</b> – FNSB residents employed in leisure & hospitality 10% of total workforce in 2019; this sector saw the greatest losses in 2020	<b>6,290</b>
<b>\$70.5 Million</b>	<b>Visitor Spending</b> – Hotel/motel annual room receipts Increased 8% from 2016 to 2019, then declined 55% between 2019 and 2020	<b>\$74 Million</b>
<b>\$143 Million</b>	<b>Wages</b> – Annual wages to FNSB residents employed in leisure & hospitality Only 4% of total wages, indicating these jobs pay less than other industries	<b>\$150 Million</b>
<b>596,066</b>	<b>Passengers</b> – Fairbanks International Airport passenger arrivals 2020 passenger arrivals were half the 2019 number	<b>625,869</b>
<b>11.7 days</b> (2016)	<b>Trip Length</b> – Average stay for visitors whose Alaska trips include Interior Alaska Visitors to Interior Alaska stay longer than the statewide visitor average of 9.2 days	<b>12.5 days</b> (increase of ~1 day)

Sources: Employment & wages from 2019 Bureau of Economic Analysis; Hotel receipts from FNSB Community Research Quarterly (as reported by Cities of Fairbanks & North Pole, FNSB Financial Services), Passenger data from FNSB Community Research Quarterly; trip length from the Alaska Visitor Statistics Program.

## Measures of Success

How can we track progress?  
Generally includes baseline  
(2019) and targets (2026)  
with growth of 5%; some  
variation between sectors

# One-Pager Breakdown (Back)

**Other  
Resources**  
Regional and  
community plans  
and resources  
related to the focus  
area

## Visitor Industry Goals – long term improvements and changes we want to see



1. Interior Alaska is celebrated as a year-round, world-class vacation destination.
2. Fairbanks is a prominent international hub for military and civilian travel.
3. Interior Alaska is recognized and rewarded for its outstanding natural and cultural resources.

## Strategies & Actions – the activities we will implement over the next 5 years and who will lead them

1. Coordinated Marketing/Planning – Fund destination marketing and planning for Fairbanks. (Goals 1, 2, 3)	
a. Promote Fairbanks as an in-state destination for Alaskans.	
b. Promote Interior Alaska as a road trip destination for Canadians, and Lower 48 visitors.	
c. Collaborate with neighboring destinations (Denali Borough, Nenana, Tok) on marketing.	
2. Top-Ranked Military Destination – Fairbanks North Star Borough. (Goals 1, 2, 3)	
a. Consider...	
3. International Aurora Tourism – Fairbanks North Star Borough. (Goals 1, 2, 3)	
a. Create...	
4. Year-round... (Goals 1, 2, 3)	
a. Increase...	
b. Support...	
c. Expand...	
5. Recreation Opportunities – Fairbanks North Star Borough. (Goals 1, 2, 3)	
a. Complete and implement the FNSB Recreational Trails Plan.	
b. Support establishment of the Alaska Long Trail.	
c. Conduct a conceptual design study for renovation of the Carlson Center, including expanding indoor recreation, fitness, and multipurpose space.	
6. Quality Infrastructure & Effective Policies – Implement infrastructure and policy recommendations from regional plans that help create livable, vibrant communities and destinations. (Goals 1, 2, 3)	
a. Maintain and implement the Chena Riverfront Plan.	
b. Complete and implement the Fairbanks Downtown Plan.	
c. (see also strategy 5, action a).	

## Other Relevant Resources

- Alaska Visitor Statistics Program. Alaska Travel Industry Association. [View here.](#)
- Chena Riverfront Plan. Fairbanks North Star Borough Chena Riverfront Commission. Amended 2016. [View here.](#)
- Comprehensive Recreational Trails Plan. Fairbanks North Star Borough. Est. completion spring 2022. [View here.](#)
- Explore Fairbanks 2022 Strategic Marketing Plan. Explore Fairbanks. 2021. [View here.](#)
- Feasibility Study & Market Analysis for the Management Options of the Carlson Center. Fairbanks North Star Borough. 2020. [View here.](#)
- Fairbanks Downtown Plan. Fairbanks North Star Borough. Est. completion Fall 2022. [View here.](#)



Developed as part of the 2022-2026 FNSB Comprehensive Economic Development Strategy (CEDs).

[www.FNSBCEDS.com](http://www.FNSBCEDS.com)

**Goals** long term  
improvements we  
want to see (5+  
years)

**Strategies &  
Actions**  
how we will accomplish  
goals and meet targets



# Next Steps

## Summit

- Industry Cluster breakouts – *today*
- Influencer breakouts – *tomorrow*
- Closing hybrid plenary – *tomorrow afternoon - 4 pm*
- Post-Summit communications, 1-pagers & summary of breakout discussions – *end of February*

## CEDS Draft & Final

- Public review draft release – *target: April 2022*
- Final draft adoption – *target: summer 2022*

# Thank you!

## **Brittany Smart**

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