

December 31, 2017

Professional Services Proposal

Haines Baseline Economic Data Report

Submitted to

**Haines Economic
Development Corporation**

Submitted by


McDowell
GROUP



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December 31, 2017

Mr. Kyle Gray
Board President
Haines Economic Development Corporation
PO Box 1449
Haines, AK 99827

Dear Mr. Gray,

McDowell Group is pleased to submit this professional services proposal to prepare the *Haines Baseline Economic Data Report*. With more than 40 years studying economic conditions and economic development opportunities in Southeast Alaska, McDowell Group is ideally suited to prepare the baseline document and set the stage for effective economic development planning.

We bring to this project the following qualifications and experience:

- In-depth experience and subject-matter expertise in the economic sectors most important to the Haines economy including travel and tourism, seafood, mining, education, health care and social services, and transportation.
- More experience than any other firm in gathering and interpreting the economic and socioeconomic data that is needed for a clear and accurate understanding of baseline conditions and development opportunities in Haines.
- A long track record of assisting communities with their economic development information and planning needs, including Juneau, Valdez, Petersburg, Sitka, Ketchikan, Anchorage, Yakutat, Kake, and others.
- A high level of familiarity with Haines, including more than 20 research and consulting assignments related to business opportunities and economic conditions in Haines.
- A project team that includes professionals that have been involved in economic development programs at the highest levels of state government. McDowell Group Principal Susan Bell (a former Haines resident) is past Commissioner of the Alaska Department of Commerce, Community, and Economic Development (DCCED). Joe Jacobson is former Director of the Division of Economic Development, within DCCED.

We are committed to providing the professional services needed for HEDC to successfully launch and sustain an economic develop program that can have a meaningful, on-going effect on business opportunities and creating a more resilient economy. We are confident our team's unique set of skills and highly relevant professional experience will give Haines the highest possible return on its investment.

Please call if you have any questions about our proposal or qualifications.

Sincerely,

A handwritten signature in dark ink, appearing to read "Jim Calvin", with a long horizontal flourish extending to the right.

Jim Calvin
Principal

Understanding of the Project

Effective economic development initiatives require a clear understanding of the forces that shape Haines' economic well-being. Without that understanding, it is not possible to draw a map from where the community is today to where it would like to be in five or ten years into the future.

The *Haines Baseline Economic Data Report* will provide the foundation needed to produce a companion document, the *Haines 5-Year Economic Development Plan*. Together, these projects represent HEDC's first critical effort to engage the community in proactively building a stronger, more resilient economy that provides meaningful economic opportunity for the people who choose to make Haines their home.

The *Haines Baseline Economic Data Report* will serve several important purposes. It will provide a thorough and objective analysis of what drives the local economy and where the economy is likely headed in the absence of proactive economic development work. It will also provide a set of metrics from which the community can set goals and measure progress toward those goals. Finally, we recommend that the baseline research include original research in the form of a household survey to objectively measure household-level economic well-being, community values, and opinions about the goals and strategies for economic development in Haines.

McDowell Group's scope of work for preparing the *Haines Baseline Economic Data Report* is presented below.

Scope and Methods

SECONDARY DATA COLLECTION AND ANALYSIS

Economic baseline research and analysis will begin with compilation of all relevant published data and a range of unpublished data that together reflect trends and conditions in the Haines economy. Sources of data will include federal government sources such as U.S. Census and American Community Survey, Bureau of Economic Analysis, and Bureau of Labor Statistics; various state agencies, including the departments of Labor and Workforce Development, Fish and Game, Revenue, Commerce, Community and Economic Development; and local sources, including the Haines Borough.

Data from these and other sources will provide a broad picture of trends in the local economy in terms of population demographics, labor force characteristics, sources of employment and wages, sources of personal income and income distribution, business sales, and a variety of industry-specific trends. We will prepare either five-year or ten-year time series (trend) analysis, depending on availability and quality of each data set.

An essential aspect of baseline analysis is accurately interpreting the data, recognizing the strengths and weaknesses of various data sets, and having the experience necessary to fill in the blanks left by inaccurate, incomplete, or non-disclosable data. Too often, economic data for Alaska's smaller communities and economies is presented as accurate and complete, when it is often more misleading than informative.

A fully-formed economic baseline must include analysis of forces at work in the industries and activities most important to the community. Understanding which forces are within local influence and which are not is critical for successful strategic economic development planning. With a professional staff of 16, McDowell Group has subject-matter expertise in sectors important to Haines, notably the visitor industry, commercial fishing and seafood processing, mining, health and social services, transportation, and others. We look forward to supporting HEDC's efforts with our many years of experience in market research and business development in these areas.

In addition, to further enhance the baseline data analysis, we will interview local business owners and agency managers in for-profit and non-profit sectors of the economy. A basic premise underlying our economic development planning work is that the barriers to growth and opportunities for expansion are most evident to the people managing local businesses and agencies.

Useful baseline analysis also includes a look ahead. The purpose of economic development planning is to create opportunity that might not otherwise exist in the absence of that planning. The scope of our baseline research will include an analysis of the trajectory of the Haines economy, and how forces affecting the Alaska economy are likely to play out locally.

Finally, additional value can be added to the baseline document by including information about the multiplier effects of various forms of investment and spending in Haines. With a resume that includes numerous local, regional and statewide economic impact studies, McDowell Group will provide that important perspective.

DATA COLLECTION THROUGH SURVEY RESEARCH

All Haines residents likely support progress towards an economically healthy, resilient, and prosperous community. However, economic development and economic well-being mean different things to different people and goals for the future may differ accordingly. To establish a baseline of community attitudes and priorities, we propose conducting a random-sample telephone survey of 200 adult Haines residents. The sample will include landline and cell-only users. Under our careful management, the survey results will be statistically representative of all Haines residents with a maximum margin of error of ± 6 percent at the 95 percent confidence level. Sub-group analysis will include examination of survey results by respondents' age, income, and potentially other demographic characteristics such as gender.

The survey instrument will be designed in close consultation with HEDC. The survey can measure residents' sense of personal economic well-being (whether improving or not), perceptions about the health of the local economy, their expectations for the local economy in the future, perceived barriers to local economic growth and diversification, opinions about what economic development goals the community should be pursuing, support for various economic and infrastructure development projects, support for public investment in economic development programs and initiatives, and a variety of other information. This survey research pulls together what may prove to be varied opinions on how Haines is doing economically, what the community should seek to achieve in terms of economic development, and how best to get there. Random sample surveying is an essential part of the public outreach effort. No other method (town meetings, mail surveys, on-line surveys alone) can yield results that are truly representative of the entire population.

The telephone survey, while generating results that are statistically representative of the entire community, will give a relatively small percentage of residents the opportunity to voice opinions about important economic development issues. However, in our *5-Year Economic Development Plan* proposal, we propose to convert the telephone survey instrument to a web-based, open-access survey. This approach gives everyone in the community an opportunity to conveniently participate in the community engagement process. The project team will use public service announcements, press releases, and other social media tools to inform the community about the opportunity to participate in the online survey.

It is important to note that online survey results will not be blended with the telephone survey results. The online survey would be subject to self-selection bias, meaning its results may not be representative of the community overall. Results for the two survey efforts will be reported separately.

Project Management

Our fundamental philosophy is that we are not done until clients are completely satisfied with all aspects of our work. It is imperative that McDowell Group clients feel they have received an excellent return on their investment in professional research, planning, and consulting services.

McDowell Group employs a project management model designed to ensure that:

- Project goals and timelines are clearly understood by both the client and the consulting team.
- Communications are always open between the client and the consulting team.
- The client is kept informed of project progress, and findings are discussed in advance of written deliverables so that work products are consistent with expectations.
- The final product always meets or exceeds client expectations.

To be certain our scope of work fully meets the needs and expectations of HEDC, we suggest a project kick-off meeting to clearly define the data collection effort. The range of potential baseline data is immense, considering all the economic, social, and infrastructure data information that might be included. It will be important to narrow the focus to capture baseline data most relevant to the goals of HEDC.

We will also take the opportunity to spend time in Haines to connect with other key stakeholders, such as the Chamber of Commerce, borough officials, and others that HEDC might suggest.

Project Team Overview

Detailed resumes for team members are provided in the following section of our proposal.

- McDowell Group Principal Jim Calvin will supervise the baseline data project. Jim will have final responsibility for the successful outcome of the project. Jim's specialties socioeconomic impact analyses, cost/benefit studies, market research, and business feasibility studies. He has been studying business, industry, and economic conditions in Alaska for 31 years.
- Our team also includes McDowell Group Principal Susan Bell. Prior to re-joining McDowell Group in 2015, Susan served as Commissioner of the Alaska Department of Commerce, where she led state

initiatives to market Alaska and enhance the state's business climate. She served as State Co-Chair of the Denali Commission and as a board member for the Alaska Railroad Corporation, Alaska Energy Authority, Alaska Gasline Development Corporation, and Alaska Industrial Development and Export Authority.

- Senior Consultant Joe Jacobson brings to the project 10 years of experience studying Alaska's economy in various roles. As Director of the State of Alaska's Division of Economic Development, he was responsible for a staff of 56 and an annual budget of over \$30 million. He previously oversaw the Alaska Seafood Marketing Institute's \$9 million International Program. Most recently, he served as Vice President of Business Development for Huna Totem Corporation.
- Heather Haugland has been with McDowell Group for 19 years, serving in a wide variety of project management and analyst roles. Heather is particularly experienced in visitor industry-related research, co-managing the Alaska Visitor Statistics Program, and project manager of several Haines specific assignments, including the Haines Winter Visitor Industry Economic Impact and Market Assessment
- Kirsten Shelton joined McDowell Group in 2010. She specializes in economic and community development planning. Kirsten co-managed McDowell Group's *Juneau Economic Plan*, prepared for the City and Borough of Juneau.

Project Schedule

The following table presents a project timeline for successful completion of the *Haines Economic Data Report* by May 1, 2018.

Haines Baseline Economic Data Report Project Schedule	
Project Task or Deliverable	Timeline
Notice to proceed and project launch	Early January
Project kick-off meeting and site visit	Mid-January
Secondary data collection and analysis	January to Mid-March
Business interviews	February
Household survey research	Feb 1 to Mid-March
Deliver baseline data report	April 1
Presentation of baseline data report and HEDC work session	TBD

Project Budget

McDowell Group's proposed budget for the *Haines Baseline Economic Data Report* totals \$25,000, and includes \$15,000 for the baseline data collection and analysis and \$10,000 for the random sample telephone survey and summary report. We propose to split the full cost of survey research between the baseline data phase and the economic development planning phase. Funding for a detailed report of survey results and the online survey would be incorporated into the budget set aside for production of the 5-year plan. We are very flexible and open to working with HEDC to develop a budget strategy that best meets the needs of the project.

Experience and Qualifications

McDowell Group Overview

McDowell Group is Alaska's most experienced full-service research and consulting firm, with offices in Juneau and Anchorage and a staff of 16 multi-disciplinary professionals. We have served Alaska's research needs for 45 years, conducting approximately 2,000 studies for over 400 public and private-sector clients. We offer these professional services:

Economic Research, Planning and Development

- Economic Development Research & Planning
- Economic and Socioeconomic Impact Assessments
- Benefit/Cost Analyses
- Community Economic Base Studies
- Cost-of-Living Research

Survey Research

- Surveys – Telephone, Mail, Internet & Personal Intercept

Business and Organizational Consulting Services

- Market Demand Assessment and Financial Feasibility Studies
- Strategic and Business Planning
- Management and Organizational Effectiveness Consulting
- Labor Force Assessments

Our clients include most state and federal government agencies in Alaska, including the Alaska departments of Commerce, Community and Economic Development; Transportation and Public Facilities; Health and Social Services; Environmental Conservation; Administration; Fish and Game; Labor and Workforce Development; and the Legislature. Our federal government clients include the National Park Service, the Bureau of Indian Affairs, and the USDA Forest Service.

We have longstanding professional relationships with local governments and local government organizations in Anchorage, Mat-Su, Kenai Peninsula, Fairbanks, Kodiak, and virtually every community in Southeast. In the private sector, our clients include businesses and organizations in the oil and gas industry, mining, health care, commercial fishing and seafood processing, the tourism industry, forest products, and the transportation sector, among a variety of others.

We have provided services to a wide array of economic development organizations throughout Alaska including the Alaska Department of Commerce, Community, and Economic Development, Anchorage Economic Development Corporation, Fairbanks Economic Development Corporation, Juneau Economic Development Council, Southeast Conference, and numerous ARDORS and Chambers of Commerce.

Relevant Experience

McDowell Group brings to this project long-term experience in the industries and economic drivers important to Haines. For example, research and consulting in Alaska's seafood industry is a core-competency. McDowell Group has been Alaska Seafood Marketing Institute's (ASMI) research contractor for 18 years, managing the *Seafood Market Information Service* and providing a wide range of professional services related to seafood market conditions and opportunities, as well as seafood industry economic impact analysis. McDowell Group has also prepared a wide range of seafood industry infrastructure development plans and feasibility studies for public and private sector clients.

McDowell Group is the State of Alaska's visitor industry research contractor. We have prepared six of seven generations since 1985 of the *Alaska Visitor Statistics Program*, a comprehensive statewide visitor survey project that provides a foundation of market intelligence used by visitor industry businesses and development organizations throughout Alaska. McDowell Group provides a wide range of services for DMOs, including convention market development, economic impact studies, and others.

McDowell Group understands the socioeconomic impacts of mining. We have prepared baseline analysis and impact assessment on virtually every operating mine and mine development project in Alaska.

We offer expertise in port development planning, including recent work for the ports of Anchorage, Valdez and Nome. We recently completed a comprehensive assessment of rail extension and port development potential for Mat-Su Borough's Port MacKenzie.

Haines may have opportunity to better capitalize on its outdoor recreation assets. In 2016, in association with SE Group, we prepared the *Valdez Year-Round Mountain Recreation Site Study*. The City of Valdez contracted for this study to understand how it could capitalize on its substantial alpine recreation opportunities to diversify the economy. The study included a detailed analysis of Valdez visitation and how market segments would likely respond to proposed mountain recreation infrastructure and attraction development. The report also included an analysis of economic and community impacts, a gap analysis, and recommendations.

We also understand the economics of evolving industries and issues. For example, in 2017 we completed the *Southeast Alaska Transboundary Watersheds Economic Impact Analysis*, a detailed study of "river economics" for Salmon State, including the Taku, Stikine and Unuk river systems. Last year we also prepared the *Economic Impacts of Locally-Grown Produce in Southeast Alaska*, a study conducted for the Sustainable Southeast Partnership and Southeast Alaska Watershed Coalition. Several years ago, we prepared, under contract to The Nature Conservancy, *An Assessment of the Economic Impact of Forest Restoration Efforts in Southeast Alaska*.

McDowell Group has been assisting communities with their economic development information and planning needs for 45 years. Several projects that best illustrate the range of McDowell Group's experience in economic development planning related work are described below.

JUNEAU ECONOMIC PLAN

The City and Borough of Juneau (CBJ) contracted with McDowell Group in 2014 to prepare the *Juneau Economic Plan*, a 10-year economic development road map for Juneau. This Plan is the result of the CBJ Assembly desire to identify strategic initiatives to position the community on a path of increasing economic resiliency and

prosperity. The planning process included development of a detailed economic baseline report to identify trends in Juneau's economy and provide an understanding of the forces shaping the local economy. A statistically-representative telephone survey of 400 Juneau households was conducted, to gather household perceptions and priorities regarding economic development challenges and opportunities in the community. An open-access online survey was also conducted to give all Juneau residents an opportunity to offer opinions about local economic development. A total of 563 residents participated in that survey. Further, an online business survey of more than 200 businesses and other employers in Juneau provided the perspective of the business community and non-profit organizations on issues related to economic development in Juneau.

A wide-ranging community outreach and communications effort was conducted, including presentations to approximately 25 CBJ Committees, special interest or other community groups; town meeting-workshops, and media outreach (project website, Facebook page, Twitter outreach, an email contact list, and press releases). The project also included research into best practices and case studies from other communities engaged in economic development activities. The planning document begins with an overview of economic development planning concepts and practices, including a detailed discussion of the critical role of local government. Juneau's collective economic development vision is described in the plan along with the community's core economic development principles. The plan culminates with an Action Plan for Juneau's economy, including detailed descriptions of eight key economic development initiatives.

SOUTHEAST ALASKA CLUSTER INITIATIVE PROGRAM ASSESSMENT

In 2016 McDowell Group conducted a Program Assessment of the Southeast Alaska Cluster Initiative for the U.S. Forest Service. The program review focused on four cluster working groups that had sustained activity: ocean products, visitor products, renewable energy, and research and development. Projects tasks included review of Cluster Initiative background documents, focus group discussions, interviews with 50 cluster participants and key stakeholders, and analysis of economic and socioeconomic indicators. The qualitative research tasks captured participants' perspectives on the cluster working group process, impacts and outcomes of the cluster group's efforts, and recommendations to improve the cluster group and regional economic development efforts. The project concluded with presentation of the project findings and recommendations to Forest Service leadership and USDA Economic Diversification Team.

ANCHORAGE ECONOMIC INDICATORS, FORECAST AND BUSINESS CONFIDENCE SURVEY

McDowell Group has served as research contractor for the Anchorage Economic Development Corporation since 2008. In that capacity, McDowell Group prepares an annual employment forecast, as well as three-year forecasts for a range of indicators, such as population, personal income, port activity, and building permit values, among others. McDowell Group also conducts an annual Business Confidence Index survey of Anchorage area businesses, to gauge expectations for business expansion and economic growth.

VALDEZ COMMUNITY GAP/MARKET ANALYSIS

The *Valdez Community Gap/Market Analysis* provided a valuable foundation for community planning and economic development. The study included compilation and analysis of baseline data, measuring trends and providing an ability to measure the effects of economic development initiatives. The study incorporated a telephone survey of 250 households and interviews with community and business leaders, providing insights

into opportunities and challenges from the local perspective. The project culminated in identification of economic development opportunities, barriers and recommended strategies.

PETERSBURG STRATEGIC DEVELOPMENT PLAN

McDowell Group's comprehensive planning project for the City of Petersburg resulted in an action plan for enhancing Petersburg's economy. In the first phase, community opinions were gathered through a statistically valid survey of Petersburg households that revealed clear preferences for particular types and scales of development. A companion survey of businesses generally supported these preferences. Baseline conditions were detailed in the *Petersburg Economic Profile*. Finally, McDowell Group worked with the Petersburg economic development steering committee to formulate strategies, actions and timetables for potential developments.

Several other McDowell Group projects worth noting include:

- *Matanuska-Susitna Borough Tourism Infrastructure Needs Study*
- *Kodiak Island Borough Comprehensive Plan Economic Profile*
- *Wrangell Downtown Revitalization Analysis*
- *Juneau Long Range Waterfront Plan*
- *Sitka Economic Profiles*
- *Ketchikan Economic Indicators and Industry Profiles*
- *Juneau Economic Indicators, Household and Business Economic Benchmark Survey*
- *City and Borough of Juneau Economic Indicators*
- *The Impact of Sealaska Corporation on the Southeast Alaska Economy*
- *Economic Impact of Kensington Mine*
- *The Economic and Program Impacts of the SouthEast Alaska Regional Health Consortium*
- *The Economic Impacts of the Visitor Industry in Juneau*
- *The Economic impacts of the Visitor Industry in Ketchikan*
- *Sitka Charter Fishing Visitor Profile and Impact Analysis*

Haines-Related Projects

McDowell Group has a long track record of research and consulting assignments in Haines. A sample of projects includes:

- *Haines Winter Visitor Industry Economic Impact and Market Assessment*
- *Haines Cruise and Ferry Passenger Survey*
- *Economic Impact of the Alaska Marine Highway System (with Haines profile)*
- *Haines Convention Center Feasibility Study*
- *North Lynn Canal Ferry Service Analysis*
- *Jilkaat Kwaan Cultural Heritage Center Management and Marketing Plan*
- *Haines Downtown Planning*
- *Haines Tourism Development Plan*
- *Chilkoot Indian Association Long-Range Economic Strategy*

- *Port Chilkoot Cruise Ship Dock Market Study*
- *Haines Assisted Living Economic Profile (in progress)*

We have conducted a wide variety of other projects that have included a Haines-related research and analysis component, particularly transportation infrastructure studies, visitor industry research, health care survey research, and other areas.

Key Project Team Members

Jim Calvin, McDowell Group Principal



Jim Calvin is a life-long Alaskan with 30 years of experience conducting economic and socioeconomic impact analyses, benefit/cost studies, market assessments, and business feasibility studies. He has led more than 500 research and consulting projects related to Alaska industry and economics.

Jim has extensive experience with local economic development analysis and planning. He managed McDowell Group's comprehensive economic development plan for the City and Borough of Juneau. He was project manager for the Valdez Community Market/Gap Analysis in 2007. He led a similar effort in Petersburg in 2001. Jim has also prepared local-level visitor industry development plans in Juneau, Yakutat, and Kake.

Jim has conducted community and regional-level economic modeling and analyses throughout Alaska, including North Slope Borough, Northwest Arctic Borough, Anchorage, Fairbanks, the Kenai Peninsula Borough, Kodiak, the, the Southwest Alaska region, Cordova, Valdez, and most communities in Southeast Alaska, including Haines. He has measured the economic and socioeconomic impacts of numerous natural resource development projects and transportation infrastructure projects.

Jim's nearly three decades of studying economic conditions in Alaska includes managing or supervising virtually all of McDowell Group's economic and socioeconomic impact studies. All these studies require detailed baseline data collection and analysis. Statewide studies prepared by McDowell Group under Jim's leadership include:

- *The Role of the Oil and Gas Industry in Alaska's Economy (2013 and 2017)*
- *The Economic Impact of Alaska's Visitor Industry (1999, 2010, 2012, 2013, 2015)*
- *The Economic Impact of Alaska's Mining Industry (Annual Updates 2006-2014, 2017 update in progress)*
- *Economic Impact of Critical Habitat Designation (2013)*
- *Economic Impacts of the Alaska Support Industry Alliance, (2013)*
- *The Economic Impacts of the Cruise Industry in Alaska (2004, 2006, 2008, 2013)*
- *Economic Value of the Alaska Seafood Industry (2013, 2015, 2017)*
- *The Economic Costs of Alcohol and Other Drug Abuse in Alaska (2012, 2017)*
- *Economic Impact of Alaska's Regional Housing Authorities (2012)*
- *Economic Impact of Early Learning and Child Care Services in Alaska (2010, 2015)*

Jim has conducted feasibility studies for a variety of for-profit and non-profit facilities and business ventures, including residential and commercial space developments, ports and harbors, hotels, industrial parks, and a range of other ventures located throughout Alaska. Projects managed or supervised by Jim include:

Marine Infrastructure

- *Port MacKenzie Rail Extension and Port Market Analysis*
- *Southcentral Alaska Ports Freight and Fuel Analysis*
- *Valdez Port Market Analysis*
- *Kodiak Island Wide Ferry Feasibility Study*
- *Gold Creek Marina Market Demand Assessment*
- *Feasibility of a Cruise Ship Pier in Sitka, Alaska*
- *Icy Strait Point Feasibility Study*
- *Demand and Revenue Assessment for a New Harbor in Saxman*
- *Tolstoi Bay Deepwater Port Feasibility Study*
- *Icy Strait Point Feasibility Study*
- *Mt. Roberts Marina Demand Study*
- *West Douglas Deepwater Port and Marina Feasibility Study*
- *Rainforest Island Ferry Market Assessment Update*
- *Port Chilkoot Cruise Ship Dock Market Study*

Seafood Industry

- *Alaska Mariculture Initiative Economic Analysis to Inform a Comprehensive Plan*
- *Kake Seafood Plant Feasibility Study and Business Plan*
- *Dillingham Seafood Processing Plant Feasibility Study and Business Plan*
- *Atka Pride Seafoods Plant Restructuring Plan*
- *Feasibility Study of a Nelson Lagoon Seafood Processing Plant*
- *Valdez Fisheries Development Association Regional Cold Storage Facility Business Plan*
- *Feasibility Study and Business Plan for a False Pass Seafood Processing Plant*
- *Feasibility Study for Reopening the Hydaburg Seafood Plant*
- *Business Plan and Feasibility Study for a Public Cold Storage in Wrangell*

Public Facilities

- *Bethel Pool Feasibility Study*
- *Skagway Municipal Pool Feasibility Study*
- *Kettleson Library Life Cycle Cost Analysis*
- *Feasibility Analysis of the Alutiiq Museum Building*
- *Demand Assessment for a Juneau Multi-tenant Nonprofit Center*
- *Seward Library Museum Feasibility Analysis*
- *Feasibility Study for a Soldotna Conference Center and Visitor Center Expansion*
- *Wrangell Museum and Civic Center Needs Assessment and Economic Analysis*
- *Kodiak Meeting/Convention Facility Demand Assessment*
- *Haines Convention Center Feasibility Study*

Other Market Assessments and Feasibility Studies

- *Pro Forma and Economic Impact Assessment of Blood Bank of Alaska Facility Expansion*
- *Global Hawk Flight Services Market Demand Assessment*
- *KANA Child Care Center Feasibility Study*
- *Market Assessment for Dimond Center Hotel Development*
- *Market Assessment for the Mt. Roberts Tram*
- *Alaska Veterans Home Feasibility Study*
- *SHI Soboleff Cultural and Visitors Center Feasibility Study*
- *Feasibility Study and Business Plan for a Kodiak Maritime Heritage Center*
- *Market Demand Assessment for a Cultural Center and Resort in Carcross*

Jim's formal education includes a Master of Science in mineral economics from the University of Alaska, Fairbanks. He earned his undergraduate degree from Western Washington University.

Susan Bell, McDowell Group Principal



Susan manages a wide array projects including community development and planning, market demand assessments, feasibility studies for public and private investments, public opinion research, and stakeholder outreach.

Prior to rejoining McDowell Group in 2015, Susan served as Commissioner of Alaska Department of Commerce, Community, and Economic Development. She led state initiatives to market Alaska domestically and internationally, develop Alaska's renewable and traditional energy resources, and enhance the state's business climate. She served as State Co-Chair of the Denali Commission and as a board member for the Alaska Railroad Corporation, Alaska Energy Authority, Alaska Gasline Development Corporation, and Alaska Industrial Development and Export Authority.

Susan's community and economic development experience relevant to the Haines Economic Development Plan includes the following projects:

- *Haines Tourism Development Plan*, which included a detailed action plan with recommendations for marketing, infrastructure development, and impact mitigation. Project tasks included a household survey, socio-economic impact analysis, executive interviews with industry leaders and public officials, and a series of public meetings.
- She led the development of the *Marketing and Management Plan* for the Jilkaat Kwaan and the *Haines Downtown Planning* project.
- Susan managed the *Prince Rupert Cruise Industry Opportunity Assessment and Gap Analysis*, which included a detailed assessment of the port's competitive position and strategies to enhance economic activity and visitor satisfaction.
- *Wrangell Downtown Revitalization Analysis* tasks included coordination of public meetings, compilation of socio-economic data, and development of Action Plan and recommendations.
- Susan contributed to the economic development strategies for the *Valdez Community Gap/Market Analysis*.

Heather Haugland, Senior Project Manager



In the 19 years Heather has been with McDowell Group, she has served in a wide variety of roles: project manager, research analyst, survey designer, and survey analyst, among others. Heather is particularly experienced in survey research, visitor industry analysis, economic impact analysis, and education-related studies. Among her roles, Heather tracks Alaska's visitor traffic, including traffic to Haines via cruise ship data, border crossings, and ferry passenger embarkations. Heather graduated from Harvard University with an honors degree in English.

Following is a list of Heather's project experience relevant to the proposed project.

- *Haines Winter Visitor Industry Economic Impact and Market Assessment*
- *Haines Cruise and Ferry Passenger Survey*

- *Haines Tourism Management Plan*
- *Haines Convention Center Feasibility Study*
- *Economic Impact of the Alaska Marine Highway System*
- *Alaska Visitor Statistics Program*
- *Regional Action Plan to Increase Educational Attainment in Southeast Alaska*

Joe Jacobson, Senior Consultant



Joe has enhanced Alaska's economy in various roles for over a decade. He served as Director of the State of Alaska's Division of Economic Development, overseeing a staff of 56 and an annual budget of over \$30 million. He coordinated with Office of the Governor, economic development agencies, local governments, and private sector entities to implement economic development initiatives across the state.

Prior to leading the Division of Economic Development, Joe developed and implemented Alaska Seafood Marketing Institute's \$9 million International Program. Most recently, he served as Vice President of Business Development for Huna Totem Corporation. There, he developed a new five-year strategic plan for Icy Strait Point, expanded cruise line and consumer marketing efforts, enhanced and expanded tour offerings, and increased tour revenues by 20 percent.

He holds an M.A. in International Relations from City College of New York, and a Bachelor's in Outdoor Studies from Alaska Pacific University.

Joe's economic development experience closely aligns with Haines opportunities. As Alaska's Economic Development Director, he implemented the state's \$19 million tourism marketing program, administered 10 revolving loan programs, and developed several new initiatives including the following:

- *Alaska North to Opportunity promotional material development*
- *Alaska unmanned aircraft industry strategy*
- *Maritime industrial services sector development*
- *Rural cultural tourism development*
- *Minerals industry promotion*
- *Value-added seafood processing*
- *Mariculture industry development*

Kirsten Walker, Senior Analyst



Kirsten Shelton joined McDowell Group in 2010. She specializes in economic and community development and planning. She recently managed several major economic impact studies, a community economic development planning process, and development of socioeconomic indicators. Before joining McDowell Group, Kirsten administered an economic development program for six years in Bellingham where she directed long-range planning, business communications, public relations, and marketing projects. Kirsten holds a Master of Environmental Management from Duke University, with a concentration in Resource Economics and Policy. She was born and raised in Juneau.

Projects relevant to this scope of work include:

- *Haines Assisted Living Community Cost/Benefit Study (in progress)*
- *Juneau Economic Development Plan*
- *Juneau Economic Baseline Study*
- *Alaska Mariculture Initiative Economic Analysis to Inform a Comprehensive Plan*
- *Economic Analysis Southeast Alaska Transboundary Watersheds*
- *Best Starts for Juneau's Kids – Economic Analysis*
- *CBJ Parks and Recreation Survey*