

Alaska FSM Sector Overview & Gap Analysis/Needs Assessment Survey

Prepared for:

Alaska Joint Fisheries Seafood Maritime Workforce Forum

Prepared by:

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McDowell Group

Presentation Contents

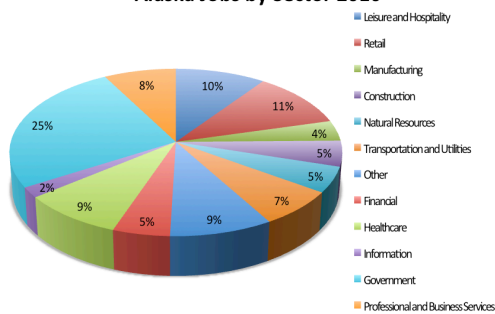
- ♦ Alaska FSM Sector Overview
- ♦ FSM Education, Training and Employment Resources
- ♦ Gap Analysis and Needs Assessment Survey

McDowell Group Role

- ♦ Define the FSM Sector
- ♦ Profile its current and evolving training needs
- ♦ Help UA analyze gaps and opportunities

Alaska Fisheries Seafood Maritime Sector Overview

Alaska Jobs by Sector 2010



Overview of FSM Businesses and Organizations

- ♦ Approx. 30 different NAICS (Industry) codes, for example:
 - 112511 – Finfish farming and Fish hatcheries ☺
 - 311711 – Seafood canning
 - 336611 – Shipbuilding and repairing
 - 483111 – Deep-sea freight transportation
 - 488320 – Port and harbor operations
 - 926110 – Administration of economic development programs

Overview of FSM Jobs and Workers

- ♦ Types of Jobs – About 80 SOC (Occupational) codes identified so far by UA
 - ♦ At least 70,000 workers
 - ♦ Perhaps 20% of all rural residents of working age.
- ♦ Annual Payroll ???
- ♦ If we can identify firms/organizations, DOLWD can tell us occupations, employment and earnings.

UA: 80+ Occupations Identified

- ♦ In addition to ones already mentioned:
 - Fisheries management, Marine biology, Hydroacoustics, Hydraulics, Refrigeration, Diesel mechanics, Marine electrical systems, Electronics, Underwater construction, Welding, Bio-remediation, Logistics, Vessel operations, Marine safety, Business management, Marketing, Law, Quality control, Recreational guiding, Food science and preparation, Regulatory enforcement, Equipment design, Environmental monitoring,

FSM Activities – Fisheries/Seafood

- ♦ Alaska produces more than half of all US seafood.
- ♦ Pollock is the most by volume, but salmon has more wholesale value than any other fish.
- ♦ Mariculture industry (shellfish) is small but growing.

Fisheries Labor Force

- ♦ 20,000 Alaska permit holders and crew not covered by NAICS codes
 - ♦ Independent business people
 - ♦ Occupational activities estimated but not tracked
- ♦ 30,000 total workers (includes perhaps 1,000 hatchery workers)
- ♦ ADF&G employs 1,400 fisheries-related personnel.

Seafood Labor Force

- ♦ 24,000 workers
 - ♦ Average employment about 17,000, but more than twice that during peak months.
- ♦ ¾ of processing workers are non-residents
- ♦ Though most employment is on processing lines, there are also skilled technical and supervisory positions.

FSM Activities - Maritime

- ♦ Personnel and businesses at more than 30 major ports and harbors.
- ♦ Vessel operations and management
- ♦ Boatbuilding and vessel services/electronics
- ♦ 30 Marine transportation companies
- ♦ Academic and applied science
- ♦ Professional services (including guiding)

Maritime Labor Force

- ♦ Alaska Marine Highway: 1,100 employees
- ♦ Other transportation and freight transport jobs not precisely identified yet
- ♦ 24 Coast Guard bases, stations and ships with 1,800 employees
- ♦ # Workers ???
- ♦ Annual Payroll ???

Importance of the FSM Sector to Communities

- ♦ 200+ coastal communities
 - ♦ 34,000 miles of coastline
- ♦ CDO Groups – 65 communities
 - ♦ Direct payroll of 1,600 workers (2008)
- ♦ 8 seafood processors and 3 marine transportation companies among Alaska's 100 largest firms.

Regions – Fisheries/Seafood

Region	2009 Ex-vessel Volume (1,000 MT)	First Wholesale Value (\$million)
Aleutian/Pribilof Islands	497	\$736
Bristol Bay	87	250
Kodiak	157	261
NW/Arctic/YK	4	16
Southcentral	78	289
Southeast	134	374
At-Sea	883	1,396
Total	1,840	\$3,323

Regions – Fisheries/Seafood

Region	2009 Workers	% of Workers
Aleutian/Pribilof Is.	11,600	62%
Bristol Bay	13,900	58
Kodiak	6,600	42
NW/Arctic/YK	4,500	15
Southcentral*	11,600	19
Southeast	15,000	17
At-Sea	7,300	n/a
Total	70,500	12%

Regions – Maritime

- ♦ Needs more research

FSM Education Training and Employment Resources

Education and Training for the FSM Workforce

- ♦ University of Alaska
 - Fisheries or resource management
 - Fisheries and marine sciences and technology
 - Including occupational endorsements in diesel mechanics, welding and commercial refrigeration, vessel operations, and many other maritime-related areas
 - Business, economics and other related education
- ♦ MAP workshops and education programs

Education and Training for the FSM Workforce

- ♦ ADOLWD/Alaska Workforce Investment Board
- ♦ Non-UA Education and Training
 - 8 to 10 training organizations provide 60 to 70 FSM-related classes, but most are peripheral, such as cooking, hazmat, basic safety, etc.
 - Of 15 apprenticeship programs listed by the Alaska Job Center (DOLWD), just one – Merchant Marine – is directly related to FSM.

FSM Workforce Employment Resources

- ♦ Alaska Job Centers
- ♦ Alaska DOLWD Career Ladder/Lattice
- ♦ UA career counseling

Occupational Needs Assessment Survey

Purpose of the FSM Occupational Survey and Training Gap Analysis

- ♦ Define the FSM Sector in more detail
- ♦ Identify unmet needs across the FSM Sector, including career paths
- ♦ Identify relevant education/training/certification sources
- ♦ Identify opportunities for the University of Alaska to support Sector development that benefits Alaska communities

Occupational Needs Assessment Survey

- ♦ Workforce trends
- ♦ Position similarities - where do skills/abilities/duties overlap?
- ♦ Geographic overlap?
- ♦ Existing vs. needed training

Occupational Needs Assessment Survey

- ♦ Survey sample and fielding
 - Not random, as many types of FSM organizations as possible
 - Need to reach the right people at each organization
- ♦ Analysis of results
 - Mid-April

In Conclusion

Summary

- ♦ The FSM Sector is large, not clearly defined, and has data challenges.
- ♦ But critical to Alaska's economy and coastal communities
- ♦ UA training efforts are broad but not coordinated around FSM. Other training opportunities are limited.
- ♦ McD Group gap analysis and survey will help match needs and resources.

Next Steps

- ♦ A survey has been drafted but will be refined based on today's proceedings.
- ♦ Distribution will begin about March 15.
- ♦ We need your help.
- ♦ Please be sure to complete the contact information sheet.

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