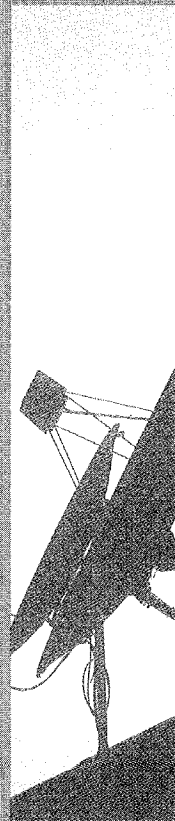


COMMONWEALTH NORTH

ALASKA'S FUTURE IN A NEW WORLD

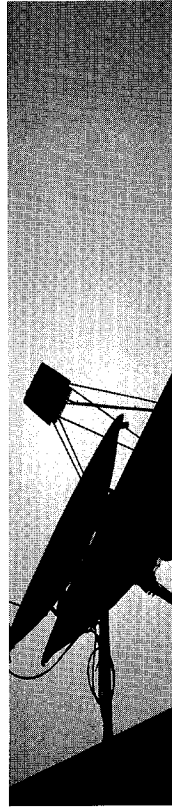


ALASKA'S FUTURE IN A NEW WORLD

A STUDY BY COMMONWEALTH NORTH

EDITED BY TOM BRENNAN

JUNE 1997



introduction

Alaska enters this new world with the essential advantages and the leverage to achieve its goals in the development of its economy, the personal growth of its citizens and in governance of its own affairs.

As the dawn of a new century approaches, Alaska finds itself in an unfamiliar situation. For the first time in its history, the state's future will be determined largely by its own decisions. Prior to 1940, Alaska was a large territory with a small population and little control over its own destiny. Most decisions affecting the broad community, large and small, were made by a distant government with limited understanding of the land and people it governed. Its attention was focused on massive changes then occurring in the world's political, economic and social climate.

The development of America's northern outpost was shaped largely by World War II, followed by the Cold War, then by fighting and continuing tension in the Middle East. These three international events dominated the nation's agenda and resulted in rapid growth in Alaska's population and economic infrastructure. In the 1960s, turbulence in oil-rich areas of the Middle East spurred an intensive search for oil reserves on U.S. soil in Alaska that ultimately led to the discovery of a massive reservoir at Prudhoe Bay. That discovery became a fourth major event that has been the primary determiner of Alaska's course for a generation.

World War II brought construction of the Alaska Highway, the territory's first land link to the other states, and a large influx of military personnel, government investment and growth of the civilian economic base to support the military buildup. The world war was quickly followed by the Cold War and a long period of international tension in which Alaska's strategic importance attracted an unprecedented federal government presence with continued military investment and an influx of civil servants to administer its natural resources, govern the civilian populace and serve federal interests here.

In 1958 the growing frustration of people in the Territory of Alaska resulted in the passage of the Alaska Statehood Act, mandating long-sought recognition that Alaska's still-small

population could better govern its affairs than could relatively uninformed decision-makers in distant Washington, D.C. In a less turbulent world, Alaska would then have taken full charge of its destiny, for good or ill. With the world then descending into the long and most hostile portion of the Cold War, Alaska's civic and political leaders soon found themselves on what New England whalers once called a "Nantucket Sleigh Ride." They were at the helm of Alaska's ship of state, but the speed and course were set by factors over which they had little control.

Alaska's government, civic and business leaders proved to be masters at turning world events to Alaska's advantage. They encouraged the military buildup, convinced oil executives to explore the northern frontier, campaigned long and hard for statehood, and created innovative systems to manage and protect Alaska's resources and rapidly growing revenues. Their skill, courage and tenacity brought Alaska through the storm in a strong and healthy condition.

As the last great "boom" winds down – the peak production years of the Prudhoe Bay Field – the winds are now calm and Alaska faces what older parts of the nation consider a relatively normal environment. To Alaska, it's a new world. The international scene still has troubling elements, and some decisions, vitally important to Alaska, remain the purview of Washington politicians representing interests in conflict with those of Alaska. But, in general, the state looks out on relatively calm waters. On the horizon we can perceive no great storms or pending

world events that will decide Alaska's future. Instead, our fate seems most likely to be determined by our own decisions on the economic, social and political issues before us.

Alaska enters this new world with the essential advantages and the leverage to achieve its goals in the development of its economy, the personal growth of its citizens and in governance of its own affairs. Modern transportation, communications and Alaska's unique global position, as well as its ownership of many resources, provide unprecedented opportunity.

Improvements in transportation and communications have put us on equal footing with much of the world in some respects. What were formerly considered Alaska's disadvantages – distance from large national and international markets, and the internal distances separating its people, are becoming advantages. Rapid and relatively inexpensive movement of people and information make possible life and business decisions that once required the sacrifice expected on an untamed frontier. Work that once gravitated to major commerce centers can now be performed virtually anywhere. The decoupling of work from great cities opens the way for Alaska's advantages – resources, environment, lifestyle and central position in the Northern Hemisphere – to come into play in personal life and work choices and in investment decision-making.

Using those advantages will require many changes in the state's approach to marketing itself and the conduct of its business.

Agenda 2000 is an analysis by Commonwealth North on the condition of Alaska's economy, quality of life, educational systems and government at a pivotal point in its history.

Agenda 2000 is an analysis by Commonwealth North on the condition of Alaska's economy, quality of life, educational systems and government at a pivotal point in its history. This report, and the study group reports from which it was derived, offer a range of recommendations for ways to attract investment, create jobs, improve the lives of those who live here, enhance and improve the education of our citizens and restructure government to use available resources more effectively.

This intensive assessment of Alaska's potential is a sequel to *Compass North*, a study conducted in 1984-85 to determine how the state should adjust its course to meet the challenges of the following decade. Like *Compass North*, *Agenda 2000* was initiated by the Commonwealth North Board of Directors and carried out by marshaling the thinking abilities of community leaders and experts in a wide array of disciplines. The 125 Alaskans who answered the latest call were organized into four panels, which met over a seven-month period. They were tasked to review Alaska's existing economic, social and educational infrastructure, its regulatory scheme and its approach to community problem-solving. Their goal was to determine if Alaska is appropriately equipped and prepared to deal with the new world and to suggest changes where needed.

The panels invited speakers with expertise in specific areas, analyzed the information and opinions collected, and worked them into a series of recommendations, an agenda for the years ahead. Their reports to the Commonwealth North Board of Directors became the foundation for a series of recommendations to Alaska's civic, business and government leadership.

With revenues from large oil fields declining, Alaska has in recent years focused on reducing its government to a size more appropriate to available revenue sources, putting its fiscal house in order. That "right-sizing" is essential to avoid economic disaster and to improve the state's investment climate. We must acknowledge, however, that Alaska cannot prepare to meet the challenges of the new world without spending more money in some areas. Some deferred or deleted expenditures are themselves a tax that will come due, either in forced cash outlays or unacceptable outcomes, early in the next century. Major investments are needed soon in education, transportation infrastructure, technology and economic development. Where possible, Commonwealth North recommends methods by which Alaska can leverage its ownership of natural resources to attract new investment without requiring the state to make large cash outlays.

The focus of the study was in large part a reflection of the economic and political environment in which Alaska now finds itself. It seems unlikely that the oil industry will be able to support Alaska in the manner to which it was previously accustomed, nor will the military or any other agency of the federal government. The oil and government sectors will be an important part of the economy for years to come, but they will be only a part. Instead, Alaska's future will be determined by decisions at many levels, some statewide, some local. Where once Alaskans could march together against external obstacles, now they must work together to achieve common

objectives with tools largely under their own control. More than ever before, Alaska will become the net result of its own decisions, large and small.

Commonwealth North recommends that Alaska adopt and pursue an agenda for this new world, an agenda that will capitalize on Alaska's strengths and achieve its full potential. That agenda should include investments and new approaches in the following areas:

Economic Development
Quality of Life
Education
Government

Some of the initiatives proposed here should be the responsibility of state government, some of local or regional government, and some of the private sector.

More than ever before, Alaska will become the net result of its own decisions, large and small.

economic development

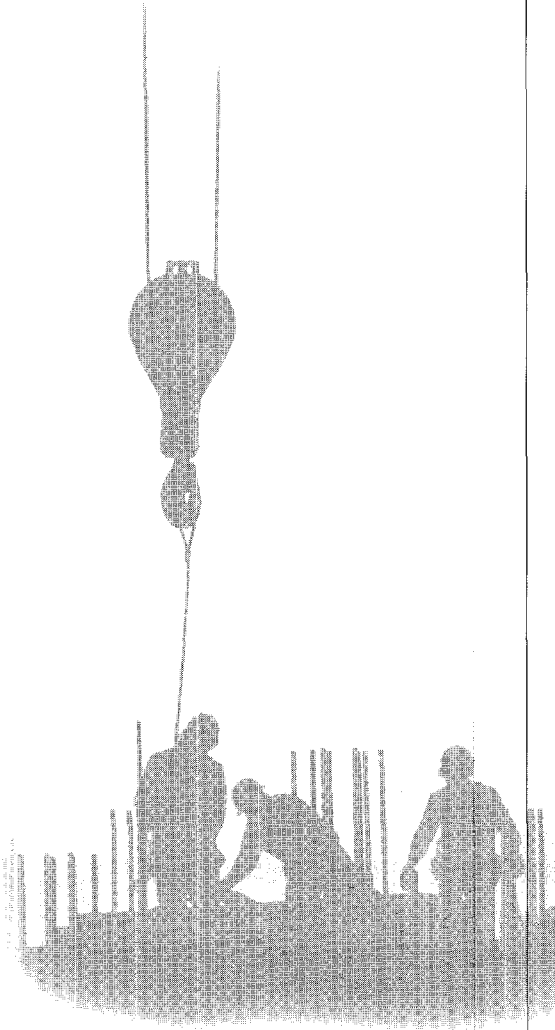
Recommendation:

Use Alaska's unique ownership position and geographic location to expand and encourage natural resources development, to add value to that development through in-state processing and to stimulate investment in a broader range of resource activities.

Oil production remains the foundation of the state's economy and new exploration in frontier areas and investment in existing fields should be encouraged. Huge potential remains under both state and federal acreage; that potential should be fully achieved and a portion of its benefits used to stimulate growth and development of other resource-based industries.

For example, the state has long sought value-added processing within its borders. Traditionally Alaska's natural resources are minimally processed in-state, then shipped quickly and directly to ports in other states and other countries. Secondary processing, the function which creates the largest number of jobs and adds the most value to the resource, has been conducted elsewhere and the benefits have accrued to those locations. Typically commodities such as crude oil are most economically refined near the markets at which they are consumed, since separating it into individual products complicates transportation requirements. But resources such as fish, minerals and timber can be processed near their source and the higher-value products shipped directly to worldwide markets at acceptable and competitive costs.

Other great opportunities exist in the vast natural gas reserves associated with the North Slope oil reservoirs. It is in Alaska's best interest that the necessary delivery infrastructure be constructed as expeditiously as possible and the gas brought to market. Bringing the gas on-line will require contractual relationships, construction of delivery infrastruc-



ture in Alaska, appropriate vessels for international transportation and infrastructure construction in the receiving markets. Many of the needed elements are beyond Alaska's control, but several of the most important—establishing a stable and appropriate tax and regulatory framework—are very much within state jurisdiction. These should be pursued and implemented.

Two gas-related issues have had insufficient attention: Alaska's own need for Alaska North Slope gas and the leverage its royalty ownership position offers for development of other resource prospects along the route of the gas pipeline. Southcentral Alaska has long used Cook Inlet's gas fields to heat its homes and offices and to generate electrical power. Those reserves are finite and will be unable to meet demand within the next decade. One or more spurs from a trans Alaska gas pipeline could provide energy to many Alaska communities and change the financial equations of a wide variety of resource prospects currently considered uneconomic.

Alaska should:

- aggressively inventory its natural resource endowment.
- devise "owner" financing for state resource development expenses. For example, invest in and become a part owner of the Trans Alaska gas pipeline.
- review and streamline rule making and permitting, including a cost/benefit analysis.
- use its natural resources as equity to build additional economic capability.

Recommendation:

Make Alaska an international logistics center.
Target air freight as a major source of economic expansion and value-added industry.

Anchorage International Airport (AIA) has the largest cargo freight operation in the United States and significant potential for further growth. As the center of the polar globe, major markets in Asia, North America and Europe lie within eight hours of Anchorage. Fifty three percent of all air cargo moving between Asia and the United States stops here. Anchorage could achieve global prominence as a center for third party logistics operations such as freight forwarding, packaging and assembly for light weight, high value goods, distribution warehousing and final testing and assembly of electronics.

Such operations could include:

- global product warehousing and distribution,
- repair and return operations,
- parts banking,
- product "staging",
- in-transit "merge" and "configuration",
- "kitting" (final assembly of packaged products).

The use of AIA as support for product development offers additional significant opportunities. Such activities need not be placed directly on the airport grounds, but are greatly enhanced as a competitive value compared to other cities by having AIA cargo operations less than an hour away.

Developing the full potential for tourism as a year-round industry will provide sustainable growth with opportunities for both rural and urban areas.

Such global logistics-based products include:

- high-value, low-weight time-sensitive items,
- electronics (parts, components, finished goods),
- semiconductors,
- scientific and testing equipment,
- pharmaceuticals,
- high-end fashion/garments.

Alaska should also:

- leverage federal funds to build intermodal connections between Anchorage International Airport, the Port of Anchorage, the Alaska Railroad and other Railbelt communities.
- create enterprise zones offering sliding scale and time-limited incentives for development in targeted areas such as value-added processing, packaging and assembly, supply-parts depots for international distribution and centers for trade warehousing.
- encourage state-leveraged investments in freight related businesses. Use its bonding authority where appropriate.
- support “Buy Alaska” programs and create jobs for Alaskans by using in-state business resources wherever possible.
- encourage collaboration between Alaskan communities, Lower 48 and Pacific Rim partners to develop new economic development ventures.
- link education and training to job opportunities and research on new markets.
- develop the fishing industry support infrastructure in Anchorage, including co-location of seafood-related businesses at an Anchorage Fisheries Center. While additional development would be valuable in many fishing and fleet servicing ports, improving the potential of Anchorage and Anchorage International Airport would open new high-value markets to the industry throughout the Northern Hemisphere.

Recommendation:

Build Alaska's full potential as an international tourism mecca.

Alaska receives 1.2 million visitors each year from all over the world, with the peak of activity occurring in the summer months. Developing the full potential for tourism as a year-round industry will provide sustainable growth with opportunities for both rural and urban areas. Developing a winter peak through appropriate infrastructure and destination packaging will make Alaska a world-class year-round experience for visitors.

Alaska enjoys a stable pattern of growth in summer tourism. Over the past ten years, expenditures by tourists have grown to a record \$1.3 billion. Of that, \$598 million (42 per cent) was spent on goods and services in Alaska. The remaining \$831 million was spent on transportation to and from Alaska (not including in-state transportation services). The growth in spending by tourists continues each year. Additionally, Alaska benefits indirectly from visitor expenditures that take place before they arrive in Alaska. These expenditures affect employee wages, in-state operations costs and capital investments by transportation and tour companies.

While summer visitors are predominantly tourists, business visitors make up half of the fall/winter arrivals. Twenty-two percent of fall/winter visitors come to visit family and friends, and only 15 per cent visit Alaska as vacation or pleasure travelers. The Anchorage Convention and Visitors Bureau (ACVB) reports that convention business remains

strong with an annual growth of approximately 8 percent. Efforts to increase tourism during non-summer months have resulted in more travelers to Alaska, yet the summer season still accounts for over 80 percent of visitors.

The greatest opportunity for growth in tourism lies in the fall/winter season. Alaska's winter beauty and unique outdoor activities make the state a world class destination for the adventurous visitor. Further development of winter attractions such as snowmobiling trails, dog sledding, and northern lights viewing would not only help the tourism sector become a year-round industry, but the increased revenues would allow for further development of the summer tourism infrastructure which is nearing full capacity. Additional facilities such as hotels are needed to build summer traffic, but are only economic if they can be kept operating throughout the year. For that reason building tourism in the fall, winter and spring is critical to the growth of tourism throughout the year, including summer.

Alaska should develop a master plan for the expansion and increased value of tourism. The plan should include provisions to:

- identify prospects for new and expanded major tourist attractions.
- create partnerships to invest in tourism expansion.
- build the infrastructure to support new and expanded developments.
- enact a seasonal tax to fund tourism marketing, the cost of tourism demands on state resources and provide funding for expansion.
- expand season and off season uses of tourism facilities.

quality of life

Recommendation:

Strengthen Alaska's sense of community and collective vision for the future. Build the economy to provide jobs and business opportunities, but work to assure that development supports the reasons we live here, including Alaska's unique environment and way of life. Invest in amenities that enhance that way of life.

Improving transportation and communications will shrink distances in this farflung state, opening the way for new inter-regional commerce, alliances and delivery of services. They could also open the way for new internal rivalry and dysfunction. Alaska's community and government leadership at all levels should take the initiative to assure the new opportunities are used to further the best interests of all Alaskans. Such initiatives should include:

- rebuilding support for charitable giving and the arts. During the days of high oil production, the oil companies and their well-paid employees became a major source of funding for charities and arts organizations. Many other Alaskans who once saw support for those activities as their own responsibility—even in Alaska's leanest years—stopped giving or reduced their gifts, feeling their personal sacrifices were no longer needed. That time has passed, the oil companies have reduced their presence and the broader community must now take back the problem.
- building a public health and safety net to assure that all Alaskans benefit from the opportunities of the new world. Change carries with it the obligation to assure that those less adaptable are not left behind. Alaska should work for a cohesive statewide community offering a diverse economic base, educational opportunities sufficient to prepare its citizens to function in that community and affordable housing, safe and dependable water and sewage, and health care.



- linking welfare reform to education, training and job needed reform, but merely limiting benefits is insufficient. Former welfare recipients will need the skills, job opportunities and support services essential to successful transition to the world of work. The transition will only be successful if the community commits the resources to provide training, job-producing economic development and essential services like child day care. It will require an investment in the future, an investment that will ultimately benefit Alaska society at all levels.

- encouraging the development of unique northern architecture and infrastructure amenities such as sidewalks, hiking, biking and ski trails. Roads and sidewalks should be improved, well maintained and promptly plowed after snowstorms. The sight of pedestrians forced into traffic lanes by unplowed sidewalks and ditches lined with up-ended vehicles is inappropriate and unnecessary in snow country. Alaska's homes, offices and public buildings should reflect and complement their natural surroundings and the unique climatic conditions of the North. Year-round recreational opportunities, especially outdoor activities, should be encouraged and developed as an essential aspect of living in our corner of the world.

- assuring the quality of our air and water. Alaska faces tremendous growth in the years ahead, growth that should be encouraged while protecting the environmental values that make Alaska one of the cleanest and most beautiful places on the planet. Alaska's natural

resources are its greatest asset and its strongest attraction. We should encourage broad citizen input into environmental health issues, taking into account available expertise, new technologies and the interests of the broader community.

- encouraging home ownership. Individual and family home ownership is an investment in the community and tends to encourage concern for, involvement in and improved understanding of community issues.

- encouraging volunteerism to help build civic responsibility, provide help for those who need it and take full advantage of the energies and abilities of our people. Volunteers are especially needed in agencies and organizations concentrating on the social services and the amenities of living in northern communities.

- encouraging community planning to assure quality of life and development of quality of life amenities.

- increasing the involvement of local citizens in government planning and increasing citizen participation in the democratic and electoral processes.

education

Recommendation:

Make education, including post secondary education, a priority.

The opportunities and challenges ahead are doubly complicated by the current but necessary emphasis on cutting government budgets, including those for Alaska's educational system, and the changing demographics of our population, especially in urban areas. Budgetary reform is vital, but Alaskans should be aware that some of the cuts being made and new ones under consideration represent deferral of essential investments. They are debts that will come due and eventually be paid, one way or another. Inevitably the time will come when Alaska will decide what services it wants enough to pay for them and how those bills will be paid.

Alaska's changing demographics are an added complication that has little-understood ramifications. The trend in the 1970s and 1980s was toward in-migration of highly skilled upscale workers to fill oil industry and high-end technical jobs. With those jobs becoming increasingly scarce, combined with parallel growth of lower-paying jobs in the retail and visitor sectors and increasing in-migration of low-income less-educated families, the challenge for our educational system is imposing.

Many new Alaskans are immigrants who have language problems but are highly motivated and able to overcome their disadvantages, if the opportunity to do so is available. But in many cases our teachers lack the training and equipment to meet the need. The lack is not a failing on the part of the teachers but on the system to provide the skills, tools and working environment to do their jobs by the standards of the day. With changing demographics often come lower test scores, growing requirements on the educational system and an increasing need for engagement of the public in discussions on how to maintain educational standards and student performance. Alaska is losing the opportunity to develop the brain power of its young people and the opportunities they need to reach their potential.

The education system's failure is acute at virtually all levels, including and perhaps especially the university level. Alaska's universities should be leaders in research and development, particularly in the areas where Alaska's needs and opportunities are unique. They could and should be breaking new ground and incubating the entrepreneurs who will build Alaska's future. But for the most part the university system is well behind the times. Many young Alaskans seek higher education outside the state, but that option is usually expensive. And for those without the financial resources, education must be offered in-state or they won't get it.

Therefore, Alaska should:

- ensure adequate state educational funding to assure student performance be within the top quarter of the national average.
- ensure 19-year-old residents have a high school diploma, a graduation rate of 90 percent and ensure that they graduate with "real world" competencies.
- unify and consolidate rural school districts wherever possible.
- encourage all high school graduates to pursue a two or four-year degree.
- encourage choice and competition within and among schools and school districts and significantly increase the involvement of parents and of the private sector in the design and delivery of educational programs.
- increase accountability for improved education through standardized testing, benchmarking and uniform standards.

Recommendation:

Adopt higher education as a full partner in Alaska's development.

- Plan and finance new and expanded training and college and technical degree programs to meet Alaska's work force needs and prepare Alaskans to meet future challenges.
- Restrict student loans to in-state institutions except in cases in which a degree program is not offered in the state. Offer incentives for those who pursue education outside Alaska and return to the state after graduation and for those who receive in-state higher education and remain in the state, especially in fields where educated workers are needed and in short supply.
- Offer both need-based and merit scholarships.
- The universities should develop residential capacities necessary to meet the demand for students desiring campus life experiences and expand campus planning to partner with the private sector to create university districts.
- New university initiatives should be planned and financed to build an international reputation.

Recommendation:

Make Alaska technologically competitive by the 21st century.

- Make computer fluency a priority educational goal.
- Increase student participation in science and math and fund the improvement of the infrastructure, equipment, and labs necessary to support these programs.
- Support integrating, expanding and operating the universities, public schools, libraries, hospitals and public television and radio stations to provide for distributed delivery of educational programs and data, as well as video and audio conferencing.

role of state government



*Alaska must set its own course,
pursuing its potential both constrained
by its means and inspired by its vision.*

Building the Alaska described in this report will require getting Alaska's state fiscal house in order and developing priorities for investing in new initiatives and deciding how to pay for those investments without deterring the economic development on which they hinge. Whether a shrinking budget and a growing state are compatible remains to be seen. In some respects they are competing ideals, but since they are ideals, they are viable paths to the future. The state cannot take one path and ignore the other. Alaska must set its own course, pursuing its potential both constrained by its means and inspired by its vision.

Many of the recommendations offered here do not require spending more money. Many do require commitment of resources, thoughtful planning and innovative approaches to economic development and governance. Some entail risk. All require willingness to accept change and new directions.

Recommendation:

Redefine the role of state government in economic development.

Since Alaska is often the resource owner, the regulator and a primary beneficiary of development, its role is complex and sometimes conflicting. The state should redefine that role to encourage economic growth while protecting the state's collective interests and those of its individual citizens. That redefinition should include:

- developing a framework for balanced assessment of the impacts of development, both positive and negative.
- making improvement of transportation infrastructure for development a high priority.
- supporting Alaska manufacturing and Alaska hire.
- encouraging co-location of offices and shared services for government agencies, both state and federal, with overlapping or compatible responsibilities.

Recommendation:
Diversify state revenues.

Pursue a balanced strategy incorporating some or all of the following:

- Diversify use of permanent fund earnings, using a portion of revenues to fund state and community infrastructure needs.
- Re-enact taxation on personal income and/or consumption.
- Increase the motor fuels tax to maintain roads.
- Use incentives to get local governments to use local tax capacities.
- Improve investment of state general fund revenues.
- Streamline state procurement.

Recommendation:
Become a recognized model as natural resource owner and trustee.

- Make state-owned resources available for private sector development on a timely and predictable basis.
- Retain state management of fish and game
- Resolve the subsistence priority issue.
- Support the state's land and revenue-sharing rents and royalty rights.
- Provide leadership in conservation and enhancement of Alaska's Continental Shelf fisheries.

Recommendation:
Maintain a competitive digital telecommunications infrastructure without state intercession. Allow the marketplace to drive telecommunications development.

New and coming telecommunications technology is bringing all Alaskans into a broader world, with important implications for economic development, delivery of a wide range of health and educational services and improvement in the quality of our lives. It will also enable the development of Alaska as a unified community in ways only beginning to be understood. The physical distances that have long separated us may become largely irrelevant as the ability to communicate and deliver vital services accelerates and expands. New job and investment opportunities will open as Alaska utilizes its global position to create new industries like those described in the economic development section of this report, many of which require advanced telecommunications capability.

Whether Alaska is able to take full advantage of the opportunities presented will depend on the health and growth of its telecommunications infrastructure. Competition will be a critical component to the existence and improvement of such an infrastructure. Alaska is farther along than most other states in development of advanced telecommunications applications. Our remote location, limited surface transportation and vast distances have spurred early and positive movement in that direction. Initially government played an active role in telecommunications development, but successful continuation and extension of those efforts will require a healthy marketplace, which in turn requires government abstention. Subsidies, where necessary, should be provided to the user, not the supplier.

Whether Alaska is able to take full advantage of the opportunities presented will depend on the health and growth of its telecommunications infrastructure.

Where consumer fees cannot support needed services, as perhaps in distance education or using telecommunications to facilitate sophisticated health care in remote communities, the telecommunications providers should be encouraged to partner with medical care providers and other parties at interest. Other partnerships might be viable to provide distance education, with costs shared by education providers and recipients.

The State should not build, own or operate any telecommunications infrastructure that can be provided by the private-sector, nor should it be an investor in such projects. It will always be a large user of telecom services, but should limit its role to procurement of services through a stringent and value-based selection process, determined solely by its own need to deliver services.

Alaska should:

- use its position as a large user to influence network advances.
- contract with the private sector to maintain satellite interconnections.
- seek competitive bids for provision of advanced telecommunications technologies to state government.
- use rigorous cost/benefit analyses in acquisition of telecommunications and information technology services and infrastructure.
- actively support universal access to state services and information to all citizens.
- encourage inter-governmental sharing of information resources via private-sector telecommunications solutions.

For additional discussion of issues addressed in this publication, see the following four study group reports, available from the Commonwealth North office:

- *Economic Stability in the Twenty First Century: Realities and Aspirations*
- *Report of the Quality of Life Study Group*
- *Education and the State's Workforce*
- *Report of the Role of State Government Study Group*

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