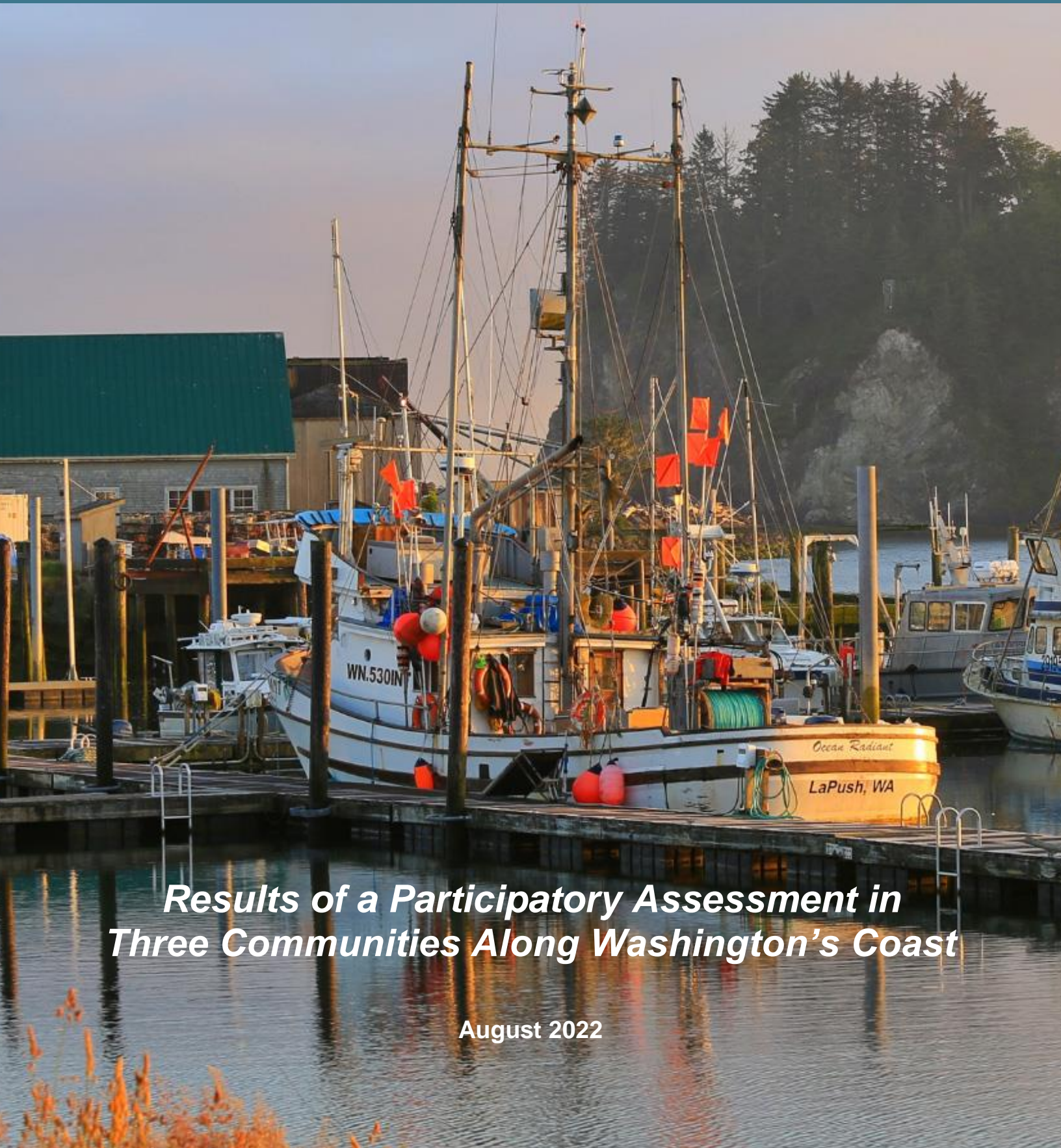


Enhancing Small Business Opportunities in the Seafood Sector



*Results of a Participatory Assessment in
Three Communities Along Washington's Coast*

August 2022

The Olympic Seafood System Alliance (OSSA) is a new and growing alliance of organizations and businesses aiming to support better livelihoods in the region’s seafood economy. Our goal is to increase economic opportunities for emerging entrepreneurs, owner-on-board fish harvesters, and other small seafood businesses.

Funding to support OSSA’s formation and community assessment work has been provided by the Thread Fund, The Nature Conservancy, Washington Sea Grant, and USDA’s Regional Food System Partnership Program.

This work has been led by the Center for Inclusive Entrepreneurship (CIE), with Rural Development Initiatives (RDI) and Tree Ring Consulting as implementation partners. Support partners include The Nature Conservancy, Washington State agencies (Department of Agriculture, Department of Fish and Wildlife, and Department of Natural Resources), and Washington Sea Grant.

This assessment report was produced by Rural Development Initiatives (RDI), under contract with Center for Inclusive Entrepreneurship (CIE).

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Washington Department of
Fish and Wildlife



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Executive Summary

This document shares the findings of a grassroots, system wide value chain assessment of the Washington coast seafood sector. The assessment was funded through a Regional Food System Partnership (RFSP) planning grant awarded to the Center for Inclusive Entrepreneurship (CIE), with additional funding from The Nature Conservancy, the Thread Fund, and Washington Sea Grant. CIE designed and implemented this program in partnership with Rural Development Initiatives (RDI) and Tree Ring Consulting, and with advisory support from Washington's Department of Natural Resources (DNR), Department of Fish and Wildlife (DFW), Department of Agriculture (WSDA), Washington Sea Grant (WSG), and The Nature Conservancy. This partnership is called the Olympic System Seafood Alliance (OSSA). A funding proposal has been submitted to continue and expand this work.

The long-term purpose of this work is to stimulate community and regionally-led partnerships and actions to address gaps within and opportunities to strengthen the region's seafood system so that it works more effectively for emerging entrepreneurs, owner-on-board fish harvesters, and other small seafood businesses. A near-term objective of this planning project is to help stakeholders identify opportunities for collaboration within communities and regionally, and to better position communities and the region to access funding to move these opportunities forward. Another near-term objective is to build partnerships and communicate with agencies and other organizations who are in a position to support the region to develop the seafood sector. The aim of this report is to summarize opportunities that communities surfaced and prioritized, and articulate possible next steps and resources needed to further these priorities.

For this work, CIE and RDI are using the WealthWorks approach to economic development to engage communities to assess the seafood value chain, and specifically identify how best communities and partners can strategically support the seafood sector to build broad community wealth along Washington's coast. With funding from the first phase, this work took place in the communities of Westport, Taholah, and La Push along Washington's coast from January, 2021, through May, 2022.

The assessment process included interviews with 44 key stakeholders, a survey with 71 respondents, and a community assessment meeting in each of the three communities. Based on needs emerging from the meetings, we are in a phase of supporting these communities as they further explore opportunities, plan implementation activities, and look for resources. We are connecting communities to partners, as well as presenting findings to partners and others who may be in a position to provide resources. We are seeking funding to continue to support the initial three communities and extend the participatory assessment work into additional communities on the North Olympic Peninsula.

Emerging Opportunities & Priorities

This section summarizes the opportunities and priorities that have emerged in each community, as well as those common across the region. These opportunities and priorities were identified through survey results, emerging themes from stakeholder interviews, and a facilitated assessment process at community meetings to brainstorm and rank opportunities. Communities are listed in order that the community workshops took place.

The 71 survey responses from Westport, Taholah, La Push, and surrounding areas represent a wide range of roles including boat captains and owners, processors, wholesalers and distributors, crew and deck hands, family members, those with tribal fishing rights, and others. Participation was balanced among the three communities, with 17 responses from La Push, 18 from Taholah, 20 from Westport, and 16 from communities nearby Westport and/or Taholah. Respondents represented a wide range of incomes and ages, though more heavily represented older age groups. Approximately 41% were women, and approximately 55% identified as Native American or Alaskan Native. (For more information on survey responses, see annexes for data from all communities combined, as well as responses by community.)

Of the total respondents, 43 expressed that they are somewhat or very concerned about the future for fishing and seafood businesses in their community. We hope that this assessment can help to address those concerns by highlighting the possibilities for community members to expand seafood sector livelihoods in a way that contributes to inclusive economic opportunities, resilient local economies, and thriving communities.

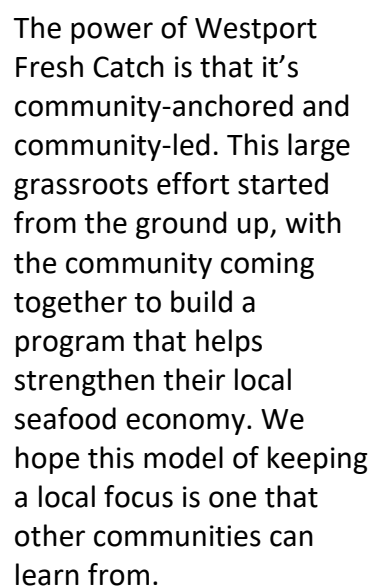
Westport

This section describes the community priorities that emerged through OSSA's engagement of Westport stakeholders—including 22 survey responses, and input from ten people who attended the community workshop in October of 2021—and identifies potential next steps and resources that could support community efforts.

Long Term Vision: More Local Channels for Seafood

A number of the opportunities that surfaced in Westport are centered around the community's desire to highlight its cultural identity as a working fishing town to increase economic opportunity for local fishermen, local businesses, and the community as a whole.

While Westport stakeholders value larger processors and the critical role they play in selling large quantities of seafood outside the region, they want to move beyond a zero-sum mindset and focus on ways to increase the pie for everyone.



The power of Westport Fresh Catch is that it's community-anchored and community-led. This large grassroots effort started from the ground up, with the community coming together to build a program that helps strengthen their local seafood economy. We hope this model of keeping a local focus is one that other communities can learn from.

A modest portion of seafood channeled to local markets can be used to enhance the identity of Westport not just as a beach town, but as a working fishing community. It can draw in more tourists interested in the community's story, and in knowing where their seafood comes from. This will result in more dollars circulating in the local economy, provide some higher value sales opportunities for fishermen, and increase related tourism business activity.

Emerging Priorities

The following is a list of opportunities and challenges in the order that roughly reflects how they have been prioritized by the community.

1. Local Branding & Marketing -

Westport Fresh Catch: A core group of committed, active community members is moving forward a marketing and branding effort to increase seafood tourism opportunities. They identified this effort as the most accessible next step toward their longer-term vision. This community team has reanimated an earlier branding project and is organizing their efforts under the umbrella of *Westport Fresh Catch*.



Westport Fresh Catch has accessed around \$10,000 of lodging taxes through the Lodging Tax Advisory Committee (LTAC) to implement a strategy that creatively considers tourist engagement before, during, and after visits. Before visitors head for Westport, *Westport Fresh Catch* reaches out with information about local seafood purchasing opportunities, and encourages them to bring coolers to bring product home when they leave. Once in Westport, *Westport Fresh Catch* caters to visitors by:

- coordinating and promoting local fishermen for visitors who want to buy fresh seafood right off the dock;
- connecting local seafood supply to local restaurants (with nine restaurants participating so far);
- deploying a suite of marketing assets (such as flyers, coasters, decals, and table tents for restaurants with QR codes connecting to online stories of local products);
- providing fillet demonstrations; and
- highlighting underutilized species to promote interest in a wider diversity of seafood products.

After visits, *Westport Fresh Catch* is maintaining communications to promote ongoing purchases and encourage return visits.

Westport Fresh Catch is also in the process of developing a map of locations to access local seafood; working with vacation rentals, hotels, and seasonal shops to display table tents advertising local seafood; educating seasonal employees; and helping coordinate a supply of local products to participating restaurants.

The group has presented to the City Council, Grays Harbor Port Committee, and has held one community kick-off event, and the community has responded with very positive feedback and excitement.

Next Steps: *Westport Fresh Catch* will be piloting these efforts during the 2022 tourist season, and results will inform their future efforts. They intend to expand their geographic reach to more of the Grays Harbor area than just the south coast to expand distribution of product. A key next step will be in solidifying this entity, likely as a non-profit, and securing funding or a business model to support staffing.

- 2. Marketing Underutilized Species:** A total of 13 survey respondents indicated interest in *fishing and sales of underutilized species* (tied for the most interest with *direct-to-consumer sales*). Expanding markets for underutilized species is one way to expand the overall “pie” in alignment with sustainable fisheries practices. And, it supports the overall community vision of expanding local market opportunities by providing species to restaurants, such as rockfish and lingcod, that are available year-round.

Westport Fresh Catch is already incorporating activities into their tourism marketing and branding work. Each month they will highlight a different fishery, including rockfish and lingcod, two underutilized species. They will have fillet demonstrations, hand out recipes, and coordinate restaurants to have specials in order to make these species available in the market and get them on the plates of tourists.

- 3. Fishermen’s Cooperative:** Community members envision a community-owned public market that includes a food hub/commercial kitchen, seafood market, commissary for food trucks and pop-ups, as well as the infrastructure, including a hoist, to support such a market—where a mix of locals and tourists can find fresh-caught storied seafood. Such an arrangement would enable fishermen to expand direct-to-consumer markets while sharing the marketing and sales efforts. While the community thinks a cooperatively owned market has low feasibility in the near term, they see it as an expression of their long-term vision and are interested in taking incremental steps in that direction.
- 4. Washington State Seafood Commission and Seafood Brand:** Another priority identified at the community workshop is establishment of a Washington State seafood commission and a state seafood brand. Success would look like every package of seafood landed in the state being labeled as Washington seafood. Similar to the

fishermen’s cooperative, the community has assessed this opportunity as relatively low in terms of feasibility. However, the Westport branding effort that the community is moving forward is a smaller scale version of the same idea—to give local seafood a voice/brand that they can control and carry forward without waiting for a larger scale effort to happen.

- 5. Off-Shore Wind:** There are plans to develop an offshore wind farm that may interfere with prime fishing grounds, and location and partners are still emerging.¹ Concerns about this wind farm interfering with fisheries were mentioned by six survey respondents, and this topic received the most “votes” for being a high priority at the community workshop. There are lots of unknowns about this plan, with unclear level of challenge and opportunity for coastal communities, but there are concerns about this farm being a detriment to seafood supply in the future depending on how it is implemented. There are already significant sections of the ocean under conservation, so fishermen are very concerned about further reduction of fishing grounds.

Potential Resources Needed

There is a strong team of Westport community members who are actively addressing the priorities above. However, their capacity is limited. An approach that has worked well in other communities, including along the North Coast of Oregon, is to have a dedicated, paid, value chain coordinator (this could be a part time person) to accelerate this work and create more gain in a shorter timeframe.

Taholah

This section describes the community priorities that emerged through OSSA’s engagement of Taholah stakeholders—including 24 survey responses, and input from 30 people who attended the community workshop in Ocean Shores in April of 2022—and identifies potential next steps and resources that could support community efforts.

Emerging Priorities

Over two-thirds of survey respondents are somewhat or very concerned about the future of the seafood sector in the community. At the workshop, community members discussed a number of interrelated issues including creation of businesses related to traditional fishing practices, expanding fishing guide apprenticeship opportunities for youth, and using technology to increase the community’s capacity to monitor illegal fishing on tribal fishing grounds. Additional priorities emerged from surveys and interviews, including support services for fishing businesses.

¹ <https://www.seattletimes.com/seattle-news/environment/seattle-developer-pushes-for-was-first-floating-offshore-wind-farm-off-olympic-peninsula/#:~:text=The%20proposed%20site%20%E2%80%94dubbed%20the,would%20become%20operational%20in%202030>

The following list of opportunities includes those that OSSA partners are in a position to potentially support. Issues related to Tribal management and governance that came up during the workshop are not included here because we recognize that these issues are outside the bounds of our role. We plan to explore opportunities with community members in more depth in the coming months, and to work in ways that support and align with Quinault Pride Seafood, the tribally owned and run seafood entity.

- 1. Surf Sack Business Opportunity:** Based on an interest that emerged at the community workshop, our team is supporting a tribal entrepreneur to start a “surf sack” business in coordination with the Cedar Root Business Center, which provides support to Quinault small business owners and entrepreneurs. Surf sacks are sacks that clam diggers attach to their belts to hold clams as they dig. This entrepreneur was taught by his father how to make the knots for these traditional sacks, and in creating this business, is keeping alive this historical knowledge and practice.

Next Steps: The business is developing the product and testing both tribal and non-tribal markets. The business will explore price points and markets, as well as other potential products such as crab pots and netting.

- 2. Fishing Guide Support:** Through the survey and community workshop, community members expressed interest in development of a fishing guide map as well as more options for fishing guide apprenticeships and safety training.

Next Steps: Our team plans to bring fishing guides together to support planning around possible next steps for specific efforts listed above.

- 3. Retirement and Succession Planning:** In the survey, the top challenge (selected by 11 respondents) was *retirement or succession planning*. Many expressed an interest in keeping assets in the community when business owners retire. Additionally, five respondents indicated they wanted assistance with *retirement and succession planning*.

Next Steps: Our team will speak with community leaders and members to learn more about needs around this issue, as well as sharing information with the Cedar Root Business Center.

- 4. Insurance:** Six survey respondents indicated they wanted assistance with *insurance*. In our interviews, boat insurance specifically emerged as an interest, and specifically an approach where people could come together and pool insurance to get a better rate.

Next Steps: Our team will research and share any relevant models of shared insurance with interested stakeholders, as well as sharing this interest with the Cedar Root Business Center and other partner organizations.

La Push

This section describes the community priorities that emerged through OSSA's engagement of La Push stakeholders—including 19 survey responses, and input from 19 people who attended the community workshop in April of 2022—and identifies potential next steps and resources that could support community efforts. Our team has presented findings to the Tribal Council, which is supportive of this work.

Emerging Priorities

The following is a list of opportunities in the order that roughly reflects prioritization by the community. Additional issues related to Tribal management and governance came up during the workshop, but we recognize that these issues are outside the bounds of our role and we are not including them here.

- 1. Growing the Tribal Fleet:** Currently there are four active fishing boats owned by tribal members. The community sees broad benefit in increasing this number to closer to seven or eight. They are interested in starting an apprenticeship program with a tribally owned boat that could provide a pathway to boat ownership and a fishing livelihood. Washington Sea Grant could potentially be a strong partner in such a program. A larger fleet might also support local marine industry development—for boat maintenance and repair, retail fishing gear and supplies, and more. These goods and services could be supplied by a fisherman's cooperative at competitive prices relative to other businesses.

Next Steps: CIE and partners will convene stakeholders to further explore interest and develop next steps.

- 2. Expanding Market Opportunities That Maximize Value:** Community members are interested in increasing market opportunities that maximize the value of local seafood, and potentially creating a fishermen's coop similar to the Cape Flattery Fishermen's Coop in Neah Bay run by the Makah Tribe. (This topic was highlighted at the community meeting, and was also reflected in survey responses, in which the top five selected opportunities related to accessing markets.) Specifically, they are interested in developing more value-add products, branding that tells the story of local fishermen (such as "Quileute Caught" to raise awareness of the source), and more direct to tourist sales. There were also participants who highlighted an interest in shipping products elsewhere, such as Eastern Oregon.

Next Steps: Short-term possibilities include piloting a pop-up market for summer tourism (such as a tent at the dock), and other small-scale experiments around distribution such as aggregated transport and drop shipping, which would require modest resources. We have been convening stakeholders to explore interest in this, as well as longer-term initiatives.

- 3. Boat to School Opportunities:** The local school district superintendent is very interested in accessing locally caught fish for the school's cafeteria as a good source of protein, to

support the local economy, and to recognize and celebrate culturally important foods. (In addition, eight survey respondents from La Push identified *Sales to Local Schools and Other Large Buyers* as an opportunity of moderate or high interest.) This work aligns with programs being developed and supported by the Washington State Department of Agriculture (an OSSA partner) to link more schools with local food, so there are potential partnerships and grant opportunities the community could explore.

Next Steps: Support the community to explore what local seafood is available, when, and how Peninsula schools could access it, and then work with the Department of Agriculture to apply for resources, potentially with technical assistance provided by CIE or other OSSA partners.

- 4. Infrastructure:** *Access to Cold Storage* and *Access to Ice* were in the top five challenges listed in survey responses, and these issues also came up in interviews. Our team would be interested in engaging the Tribal Council to see if they would like support in exploring opportunities and writing grants to access funding through the EDA or other potential partners. There is potential funding available from the Washington State Department of Agriculture (an OSSA partner) to support boat to school value chain infrastructure, which might simultaneously address the infrastructure needs and the interest in boat to school programs, for example by supporting ice equipment and rolling stock for distribution.

Priorities Across Communities

Common priorities that emerged in two or three communities include the following:

- 1. Marketing Underutilized Species:** Westport's interest in this topic and their current marketing activities are already noted above. In addition to 13 survey respondents from Westport, nine respondents each from Taholah and La Push also expressed moderate to high interest in fishing and sales of underutilized species. The Nature Conservancy's work in this area, particularly on the marketing side, could provide opportunities for fishermen in these communities to add or increase product lines that support more diversified and sustainable fisheries.
- 2. Boat to School Opportunities:** In addition to La Push's interest in this opportunity noted above, 14 survey respondents from Taholah and seven from Westport also expressed moderate or high interest. Boat to school efforts are often challenging because of the higher price point of seafood relative to other proteins, as well as seasonality of seafood products, so programs may need to be modified or tailored to the specific conditions of coastal communities. Perhaps there could be incentives for use of underutilized species. The Washington State Department of Agriculture is promoting a Boat to School initiative, and the fact that WSDA is an OSSA partner gives us unique opportunities to bring attention to community challenges as this and similar initiatives develop.

-
3. **Producing Compost from Fish Waste:** Ten survey respondents from Taholah, seven from La Push, and six from Westport expressed moderate to high interest in *producing compost from fish waste*. However, respondents expressed confusion and concern about legal requirements and limitations for using fish waste in commercial products. There is a need for further education, as well as an opportunity to engage potential entrepreneurs to develop products.
 4. **Kelp Production:** Kelp production was a moderate or high interest of eight survey respondents in Taholah, seven in La Push, and one in Westport. One person noted a desire for more hands-on knowledge about this opportunity. Next steps may include connecting interested entrepreneurs with The Nature Conservancy and Department of Natural Resources about this topic.
 5. **Training on Fish Handling and Bleeding:** Survey respondents expressed some interest in fish handling and bleeding (nine from Taholah, five from La Push, and three from Westport). While the overall survey numbers were not as high as some other areas, most of the respondents from both Taholah and La Push expressed high, rather than medium interest, suggesting that those who are interested feel strongly that this would be beneficial.
 6. **Accessing Loans and Capital:** Many survey respondents identified access to loans and capital as a challenge (nine respondents from La Push, seven from Westport, and six from Taholah), and a number expressed interest in assistance (four from La Push, seven from Taholah, and five from Westport). Our team will engage and share information with Community Development Financial Institutions (CDFIs) and lenders, such as the Taala Fund, JST Capital, and the Lummi CDFI.

Next Steps

When communities have identified next steps for the opportunities listed above, they have been noted. However, in most cases, next steps are still being formulated. Our team plans to share results of this report with OSSA partners and other stakeholders more broadly, and to engage in discussions of how partners might be able to support communities with prioritized opportunities, and to brainstorm resources that communities could access to support this work. We are also seeking funding to continue supporting these three communities as they address their priorities, and to expand the participatory assessment work into additional communities.

Background

RFSP

USDA's Regional Food System Partnerships (RFSP) Program is implemented under the Local Agriculture Market Program (LAMP). RFSP supports partnerships that connect public and private resources to plan and develop local or regional food systems. The program focuses on strengthening the viability and resilience of regional food economies through collaboration and coordination. For more information, see: <https://www.ams.usda.gov/services/grants/rfsp>

Center for Inclusive Entrepreneurship

The Center for Inclusive Entrepreneurship (CIE) was the lead organization on this project. CIE offers highly accessible and inclusive first step training and support to low-income emerging entrepreneurs and existing microenterprises in underserved rural communities throughout Washington State. Established in 2013, CIE has contributed to the journeys of over 2,000 people who have launched over 250 new businesses, creating over 300 new jobs, and obtaining over \$4.25 million in startup and expansion capital.

CIE has a longstanding interest in entrepreneurship as a strategy for building capacity to lead systemic change that builds sustainable, resilient, and equitably shared community wealth. Since 2013, CIE has partnered with The Nature Conservancy to explore how grass-roots triple bottom line entrepreneurs can build leadership capacity and contribute to a diverse and resilient local economy in rural and tribal communities on Washington's Olympic Peninsula. With funding through the USDA's Rural Business Development Grant, TNC and CIE launched the Washington Coast Works: Sustainable Small Business Competition, a 4-year initiative helping over 60 emerging entrepreneurs develop business plans and access \$80,000 in seed grant funding, leading to the development of the Coast Works Alliance to pursue systemic community wealth building projects, including in the seafood sector. Coast Works participants and winners include several people starting and growing small fish harvesting and other seafood businesses in the project region. CIE recently completed a two-year project for the Taala Fund, a Native Community Development Finance Institute serving the Quinault Indian Nation, helping them develop the Cedar Roots Business Center to re-envision programs and support for innovation and entrepreneurship for the Quinault community in and around their reservation in Taholah.

Website: cie-nw.org

Rural Development Initiatives

RDI is a nonprofit 501(c)(3) organization that strengthens rural people, places, and economies in the Pacific Northwest. Established in 1991 to help Oregon's rural communities move forward after devastating shifts in resource-based economies, RDI has worked in over 300 communities across the region. RDI works to develop networks of rural leaders, revitalize rural economies, and elevate rural voices and priorities, and has supported over 8,000 rural leaders working for community and economic vitality, engaged over 700 rural Latinx in entrepreneurship trainings, helped create and implement local economic development strategies in hundreds of rural

communities, and convened over 3,500 people to uplift rural at 12 biennial Regards to Rural conferences.

For the past seven years, RDI has served as one of six national WealthWorks hubs, advocating for doing economic development differently, providing training, and leading and coaching implementation efforts in the Pacific Northwest. RDI has used this approach on the Coast of Oregon to support improved livelihoods for small boat fishermen and small seafood businesses, which began in 2015 and has resulted in increasing multiple forms of wealth in the region and a robust regional group actively coordinating with the broader regional food system. RDI has also used this approach to support community and regional efforts in the food and forestry sectors.

Website: rdiinc.org

WealthWorks

WealthWorks is an approach to local and regional economic development that brings together and connects a community's assets to meet market demand in ways that build livelihoods that last. It aims to advance a region's overall prosperity and self-reliance, strengthen existing and emerging sectors, and increase jobs and incomes for lower-income residents and firms — all at the same time. It can work for people, firms and places of all sizes, shapes and success levels. The WealthWorks approach is designed to produce and sustain these results:

- Build a more self-reliant and robust area economy.
- Bring underutilized community assets—people, place, property and know-how—into fuller participation and production.
- Create wealth that sticks—because it is locally owned, controlled, and reinvested.
- Increase upward mobility overall and advance the livelihoods of lower-income people, firms, and places.
- Strengthen industry sectors that fuel the economy in alignment with environmental sustainability and long-term resilience.
- Forge valued partnerships that can ably and flexibly connect again and again to power increasingly resilient regions.

For more information, see www.wealthworks.org

Process

The initial phase of the Olympic Seafood System Partnership work funded by USDA was carried out from October 2020 through September of 2022. This work included engaging state and regional level partners to better understand support they can provide to communities, and engaging seafood stakeholders from the three communities: Westport, Taholah, and La Push.



Engagement included the following:

- Interviews with key stakeholders at state, regional, and community levels.
- Engaging key agencies and organizations as support partners. (This support is varied and includes funding, staff engagement, information and knowledge sharing, and a shared interest in supporting communities in their efforts to promote economically and environmentally sustainable fisheries).
- Surveys of community members.
- A community workshop in each of the three communities.
- Follow up engagement and support of community groups.
- Ongoing updates and dialogue with state and regional partners/stakeholders.

The workshops included sharing of feedback from surveys and interviews, and a participatory value chain mapping process in which community members “mapped” their value chains, including assets, challenges, and opportunities. They then ranked challenges and opportunities on two dimensions of feasibility and impact, and then selected the priorities and opportunities that they most wanted to work on together. We then supported small groups to brainstorm next steps, who should be involved, and what resources are needed to successfully address the particular challenge or opportunity.

Our work is guided by the principles embodied in the WealthWorks approach to economic development (described above) which focuses on building multiple forms of community wealth, enhancing local ownership, and expanding equitable access to economic opportunity.

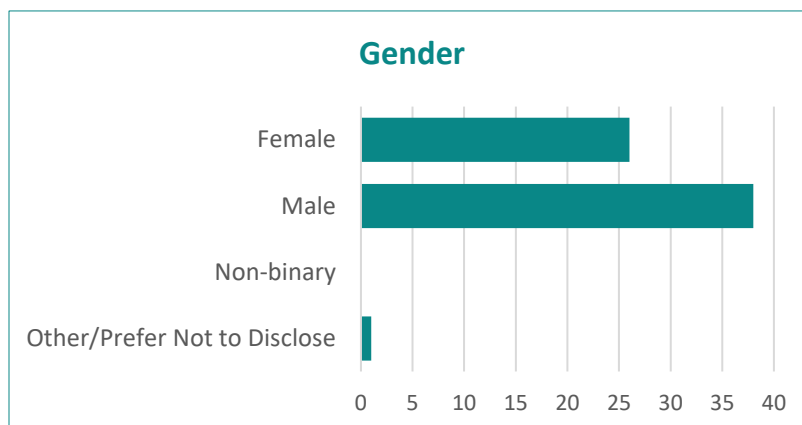
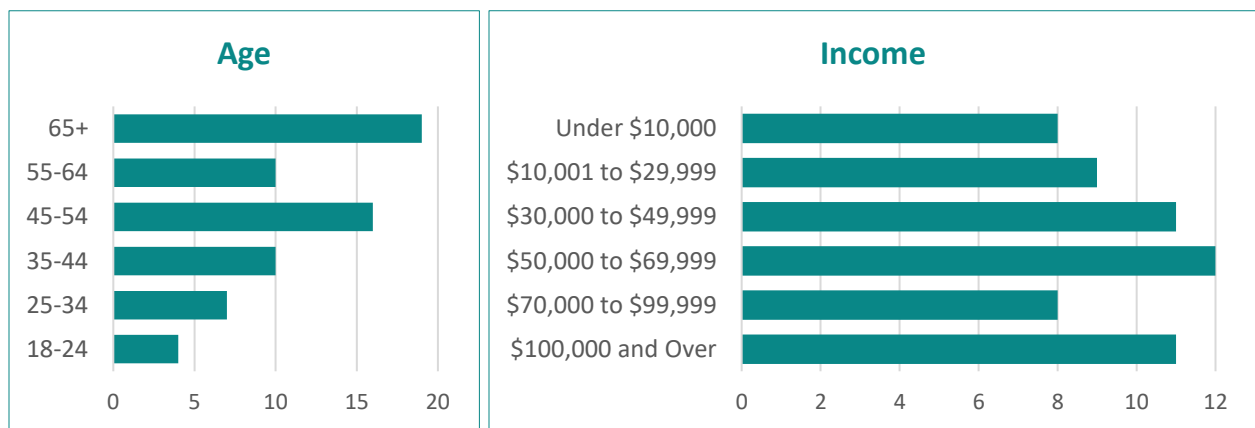
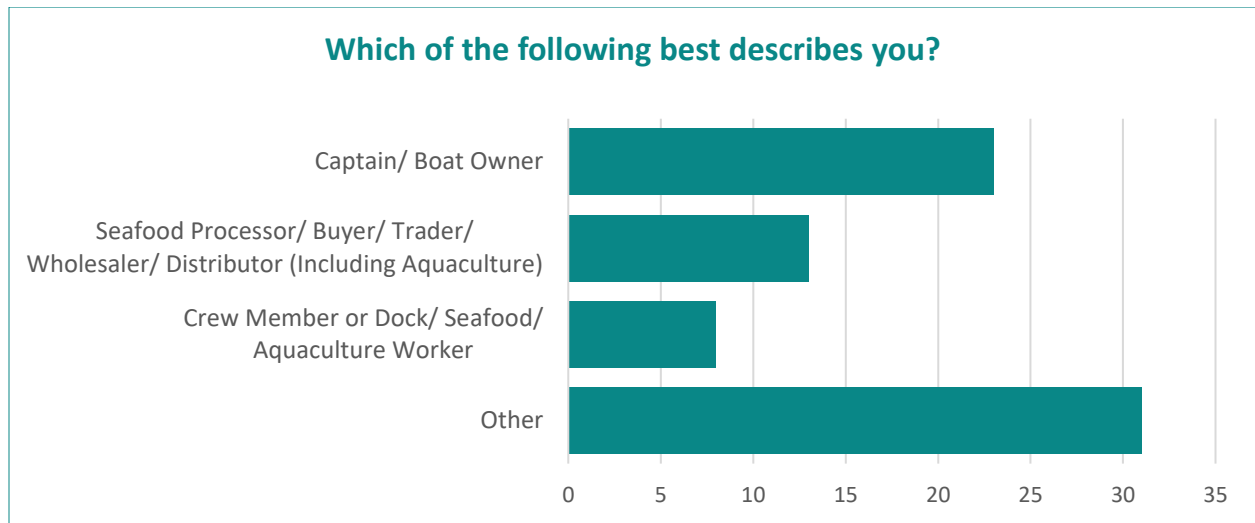
Based on the information emerging from the community meetings, we are in a phase of connecting communities to partners and resources to address their needs, as well as presenting findings to partners and others who may be in a position to provide resources.

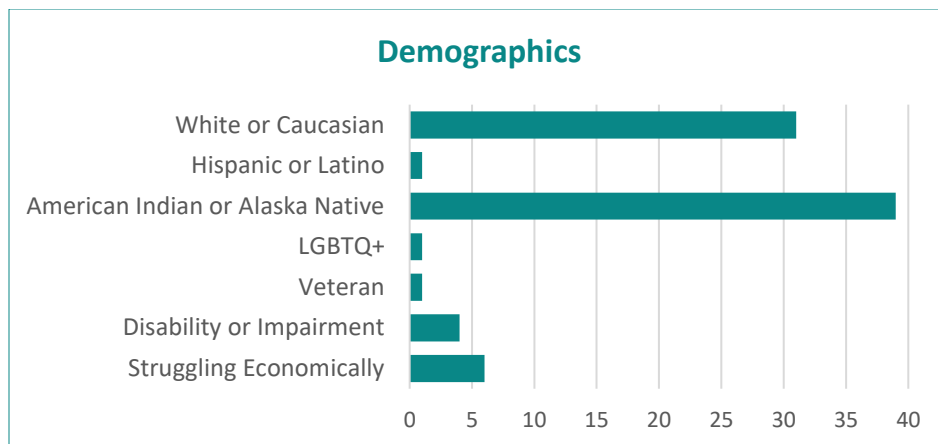
We are seeking funding to continue to support the initial three communities, and extend the participatory assessment work into additional communities on the North Olympic Peninsula.

Annexes

1. All Survey Results
2. Westport Survey Results
3. Westport Community Meeting Results
4. Taholah Survey Results
5. Taholah Community Meeting Results
6. La Push Survey Results
7. La Push Community Meeting Results
8. Interview List

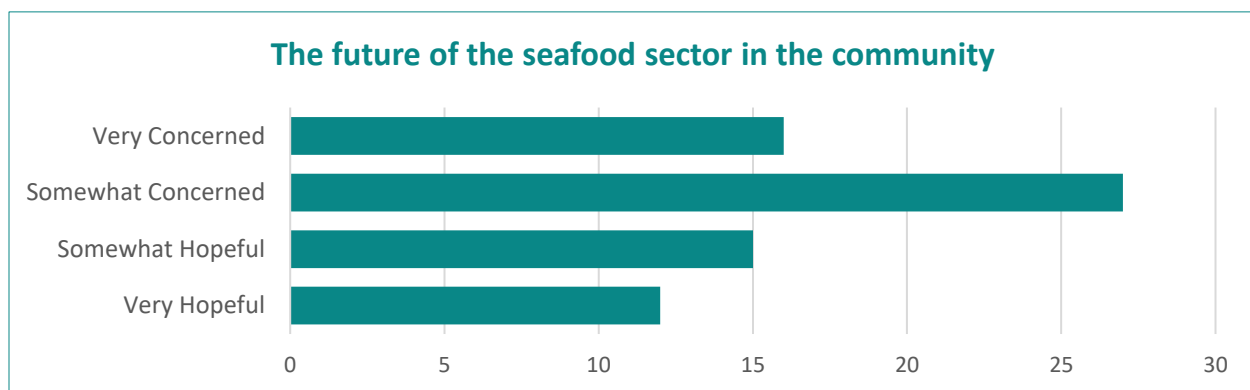
Annex 1: All Survey Results



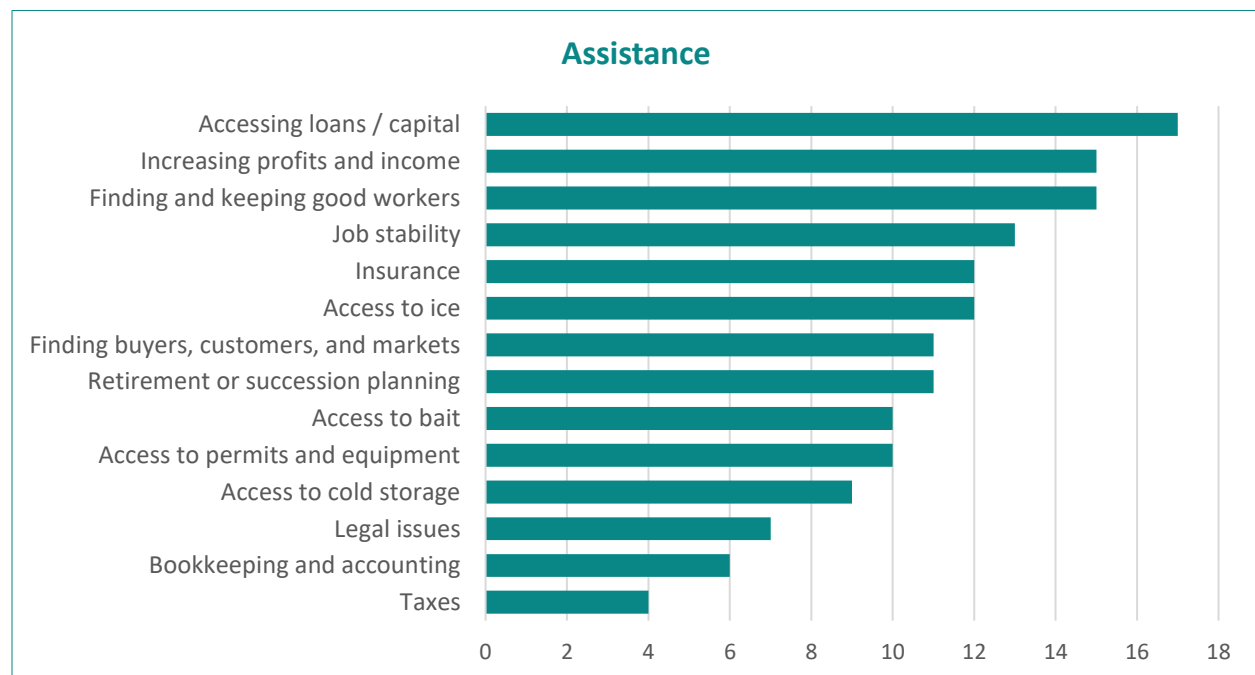
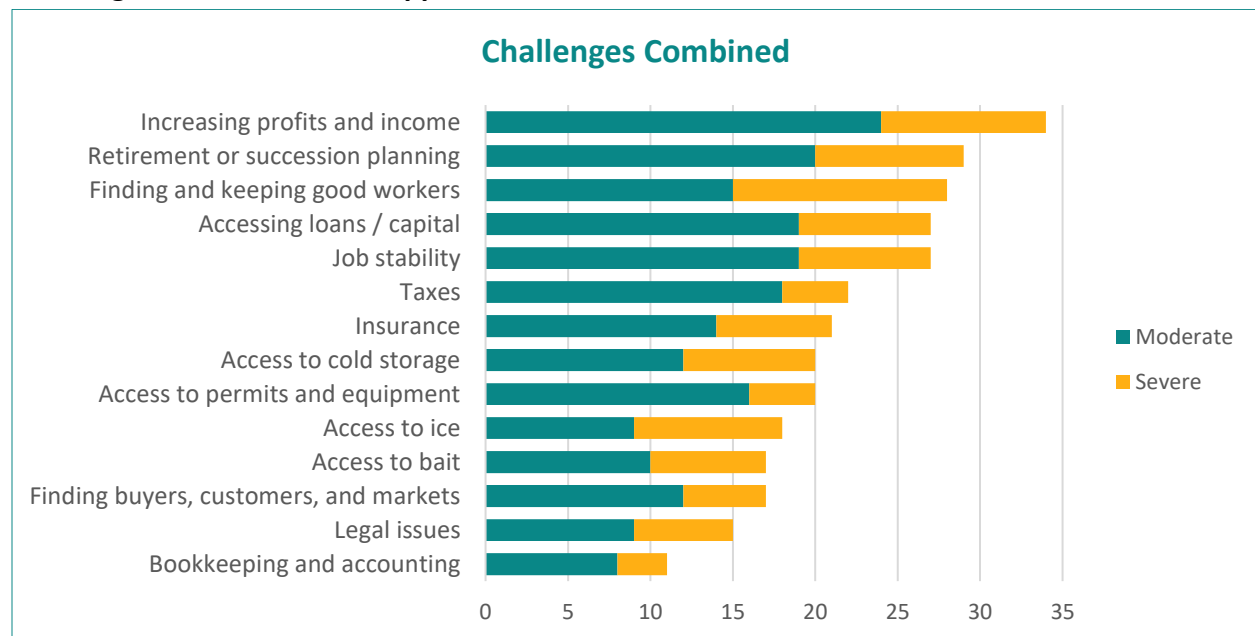


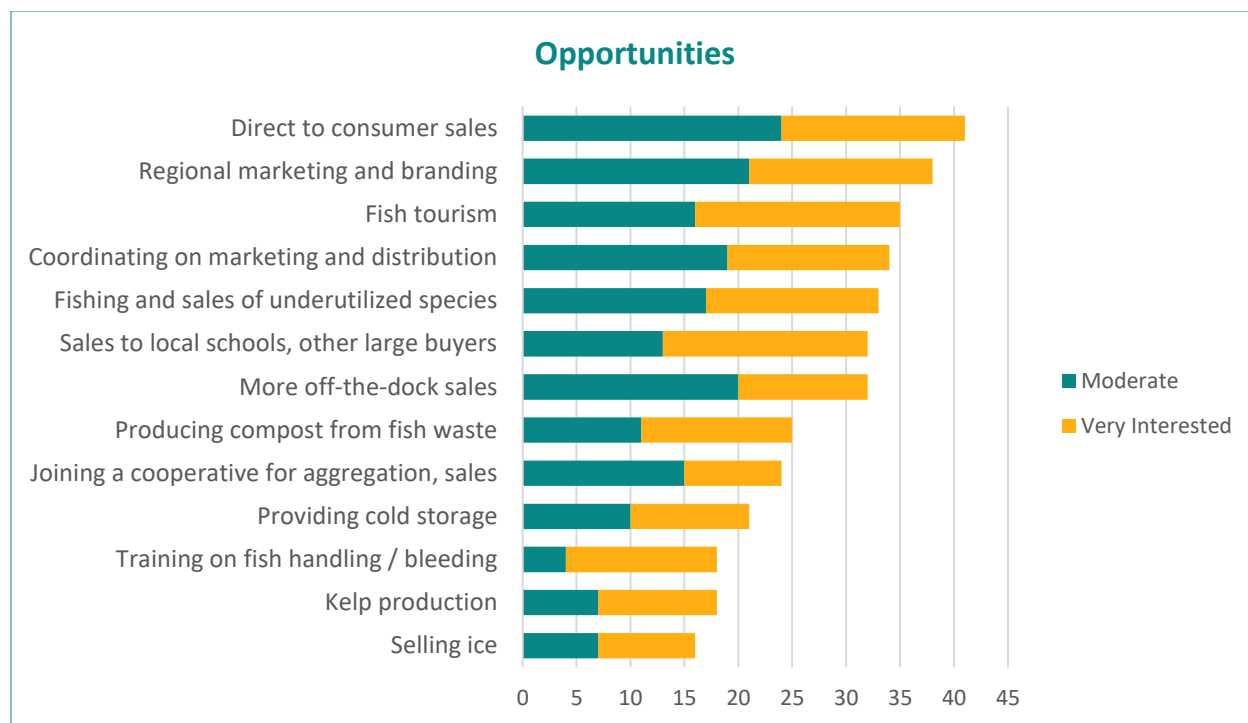
Categories that were not selected: Black or African American; Asian or Pacific Islander; Immigrant or DREAMer; English as 2nd Language

In general, how do you feel about the future for fishing and seafood businesses in your community?



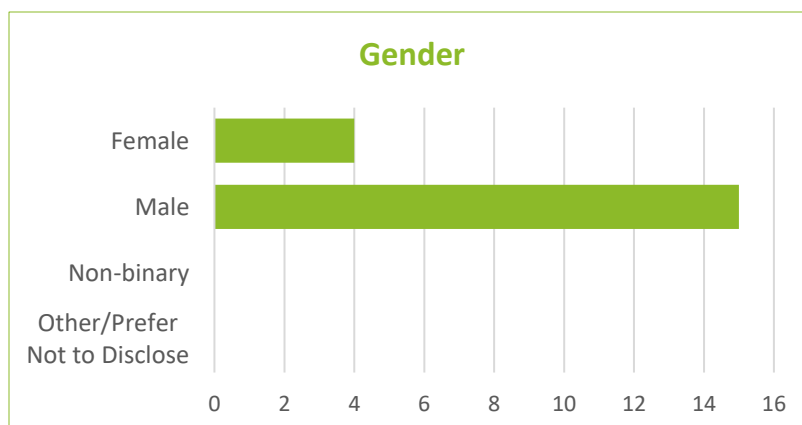
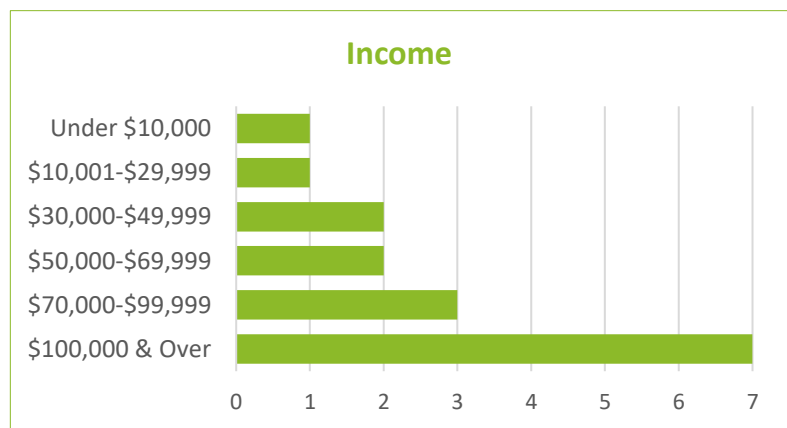
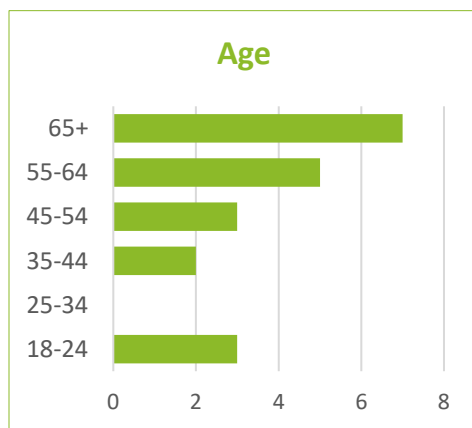
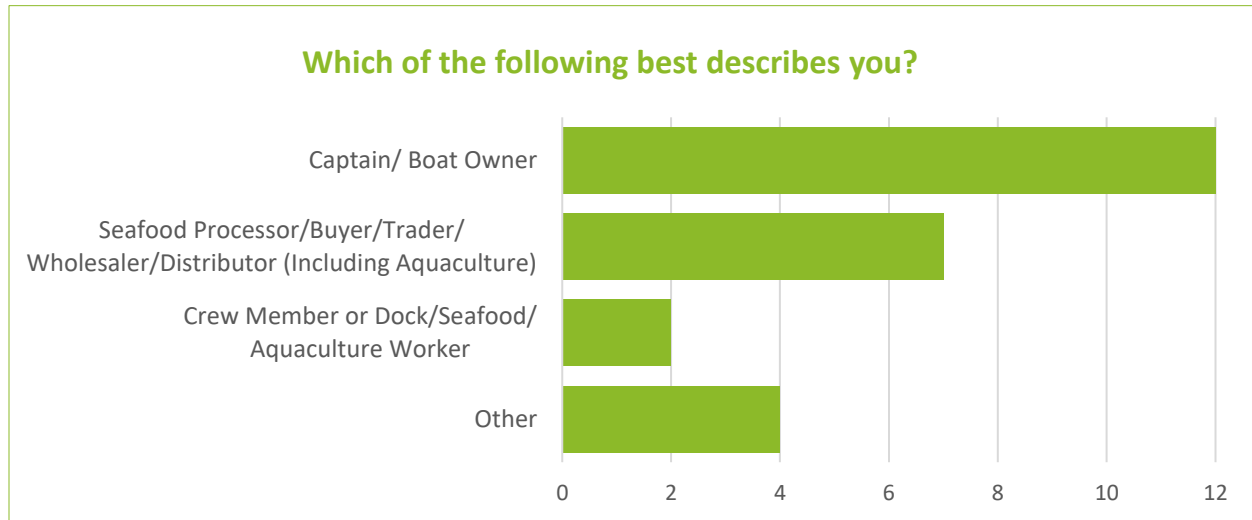
Challenges, Assistance, and Opportunities

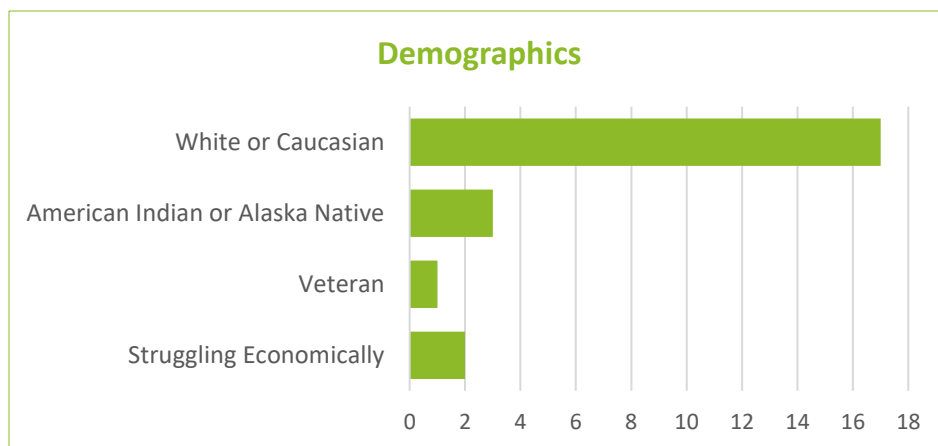




Annex 2: Westport Survey Results

The 22 survey responses from Westport represent a wide range of roles (boat captains and owners, processors, wholesalers and distributors, crew and deck hands, among others), a majority were over 55 years old, and a large majority were men. Over 50% make more than \$70,000 in income per year.

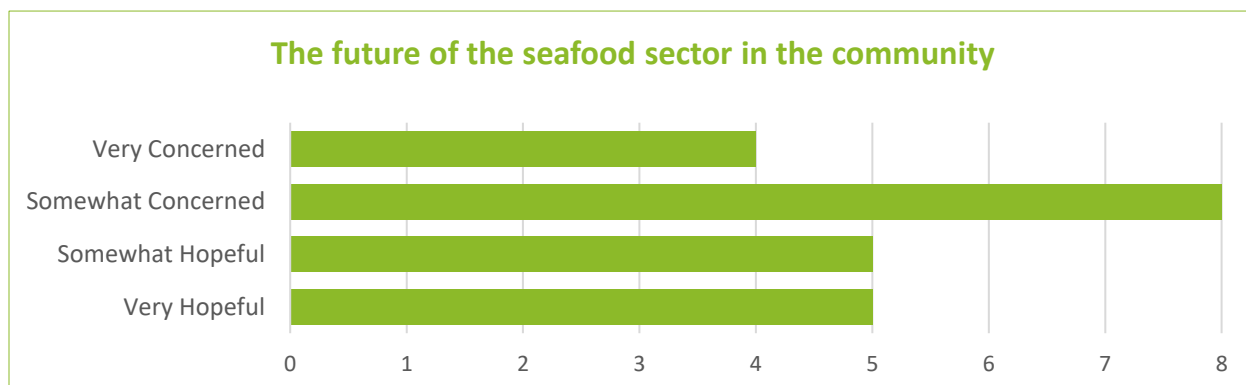




Categories that were not selected: Hispanic or Latino; Black or African American; Asian or Pacific Islander; Immigrant or DREAMer; English as 2nd Language; LGBTQ+; Disability or Impairment

In general, how do you feel about the future for fishing and seafood businesses in your community?

Over half are somewhat or very concerned about the future of the sector.



Over half of the survey respondents from Westport are somewhat or very concerned about the future of the seafood sector, and they listed a variety of issues as cause for this concern. The most frequently listed issues include the following:

- **Regulatory issues**, including restrictions related to whales, taxes and fees, fishing permit costs, and gear regulations (mentioned by seven survey respondents);
- **Concerns about offshore wind** interfering with fisheries (mentioned by six survey respondents);
- **Climate change and environmental issues**, including sea temperature, domoic acid, weather changes due to climate change (mentioned by three survey respondents);

Challenges, Assistance, and Opportunities

Top challenges facing respondents are diverse, and include increasing profits and incomes, finding and keeping good workers, taxes, insurance, and retirement and succession planning. Respondents indicated they wanted assistance with accessing loans and capital, insurance, and job stability.



Which of the following opportunities interest you the most?

There is significant interest in increasing marketing and sales.



The six opportunities that received the most expressions of interest are all related to marketing, distribution and sales, and are interrelated. Notably, ***fishing and sales of underutilized species*** is the opportunity of most interest.

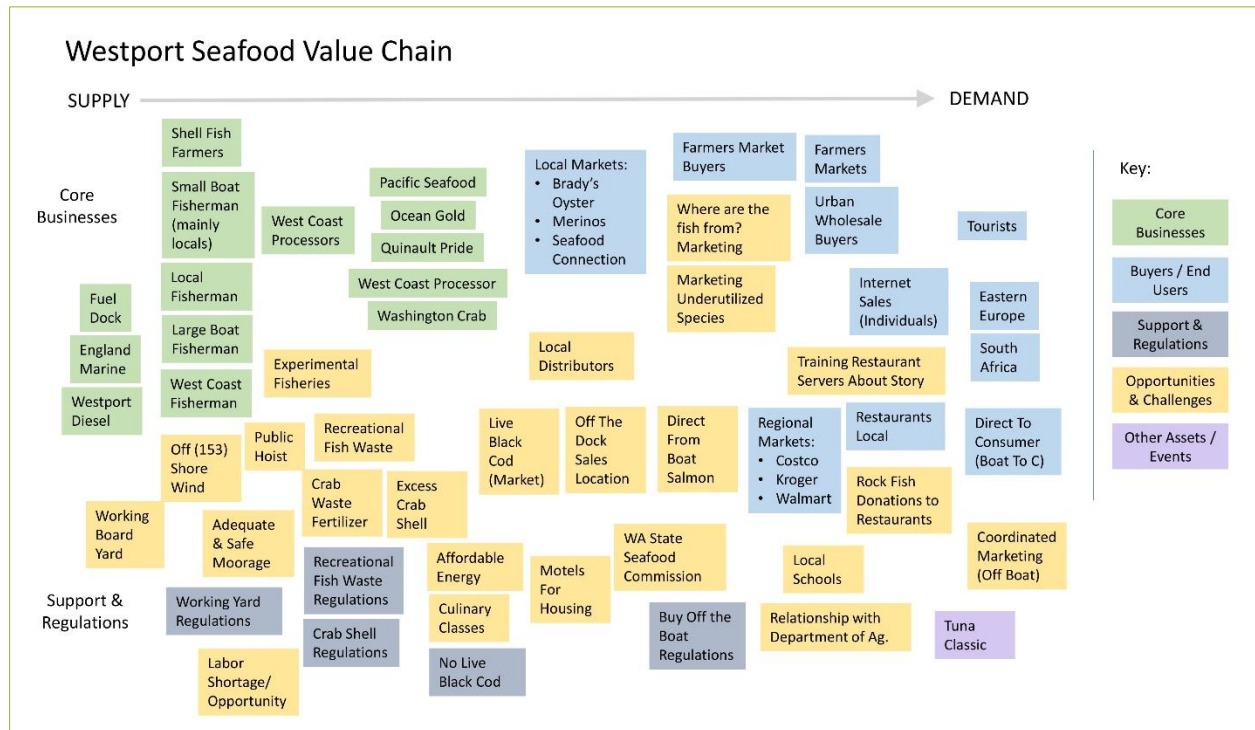
Another area of interest is producing compost and other products from fish waste (6 people expressed an interest), but a survey taker noted that the WA Department of (DOE?) has classified fish waste as industrial refuse so that it is not currently legal to use fish waste as fertilizer.

An area of interest that was not offered in the multiple choice options, but which five people mentioned in open ended questions, is a public hoist and boat yard to increase opportunities for small fishermen to sell to small buyers and directly to the public.

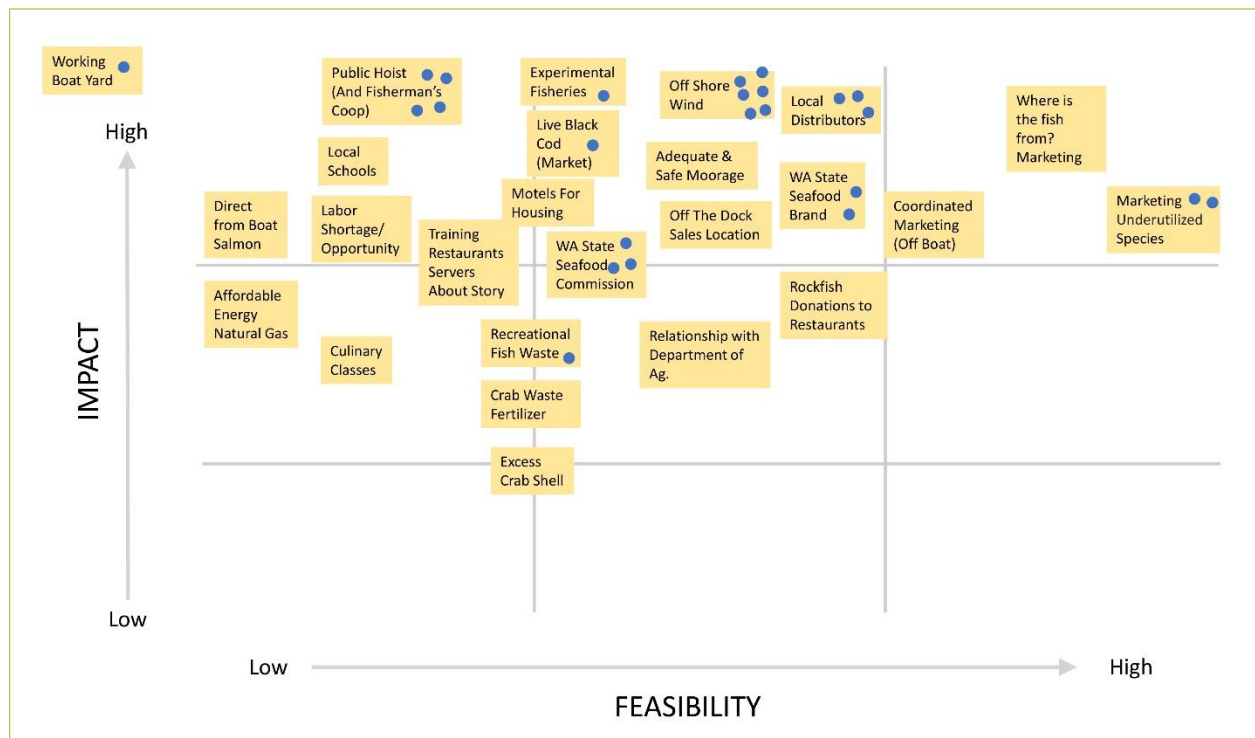
Annex 3: Westport Community Meeting Results

The following are results from the workshop held in Westport on October 28, 2021.

a. Westport Value Chain Mapping Results



b. Westport Feasibility Impact Analysis



The Westport participants prioritized opportunities and challenges as follows:

1. Off-shore Wind (6 dots)
2. Public Hoist (and Fishermen's Cooperative) (4 dots)
3. Local Distributors (3 dots) - happening
4. WA State Seafood Commission (3 dots)
5. WA State Seafood Brand (2 dots)
6. Marketing Underutilized Species (2 dots)
7. Experimental Fisheries (1 dot)
8. Live Black Cod (1 dot)
9. Recreation Fish Waste (1 dot)
10. Working Boat Yard (1 dot)

They then decided to break out into two groups to discuss 1) the public hoist and fishermen's cooperative, and 2) the potential for a WA State Seafood Commission and a WA State seafood brand.

Notes from Breakout Sessions

1. Group 1: Hoist / Fisherman's Cooperative

What does success look like? A community-owned public hoist co-located with food hub/commercial kitchen, seafood market, commissary for food trucks and pop-ups and others – where a mix of locals and tourists will find fresh-caught storied seafood.

Who are the stakeholders?

- Gov. Inslee's Maritime Blue initiative
- Washington State legislators representing the region
- Washington Department of Commerce's Tourism Marketing Authority
- Port of Grays Harbor
- Westport Marina
- Pacific Seafood
- Ocean Gold
- Washington Crab Producers
- D&M Live Crab
- Quinault Pride
- local fisherman
- local seafood businesses

What resources are needed?

- A location
- Hoist and related equipment
- An entity (co-op?) to operate the hoist, food hub and commissary

-
- Tenants for the market space
 - Insurance
 - Financing
 - USDA Grants
 - Allocate a % on moorage
 - Landing tax*

*Currently, taxes on landings go into Washington State's general fund which is apparently administered by the Department of Revenue. It would likely require legislation to direct these funds to Westport.

2. Group 2: WA Seafood Commission / WA Branding Breakout Group

What does success look like?

- Similar to Alaskan Seafood, every package says "WA Seafood"

Steps:

- Dept of Ag - find out steps
- Votes by fisherman and processors
- Outreach/advocacy

Challenges:

- Would take time to get everyone on board
- Needs to be financed by industry (smaller operations are interested; larger ones not so much)
- Working across tribal & non-tribal fishermen (will the Quinault Tribe be interested?)

Resources:

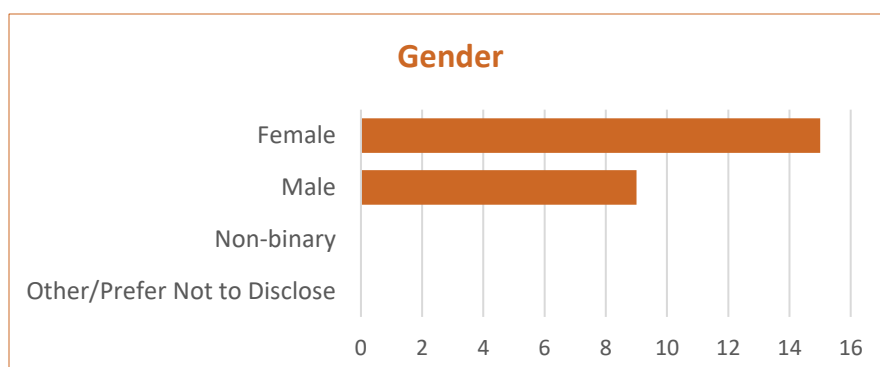
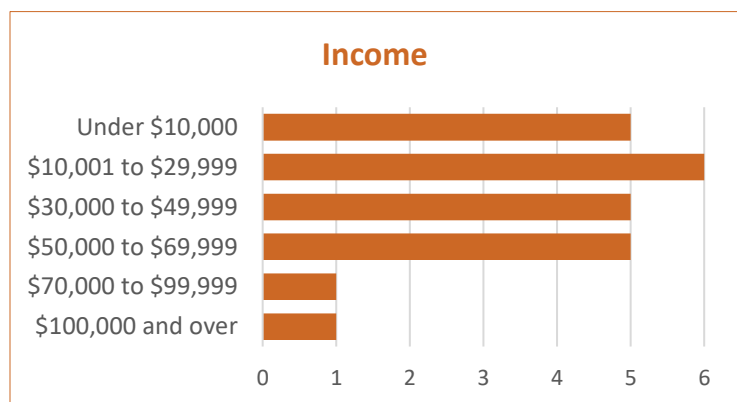
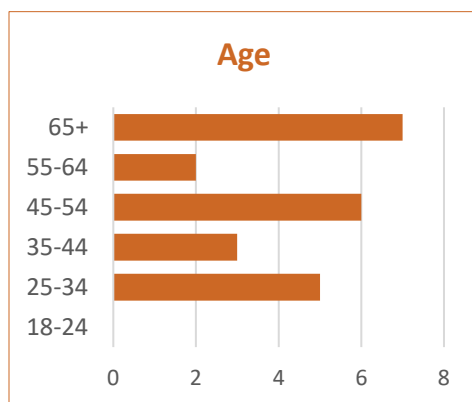
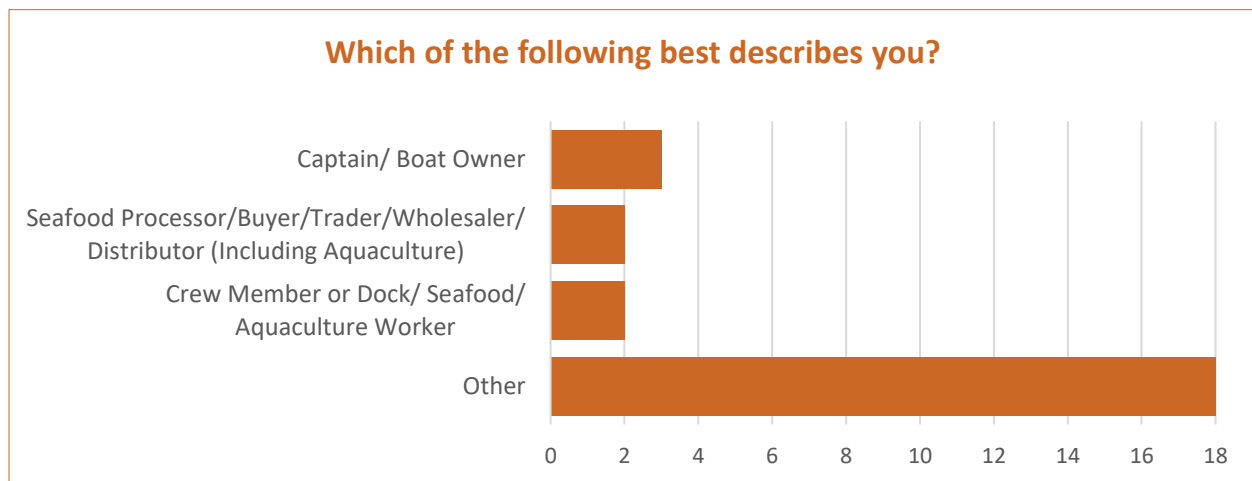
- Someone to lead/capacity

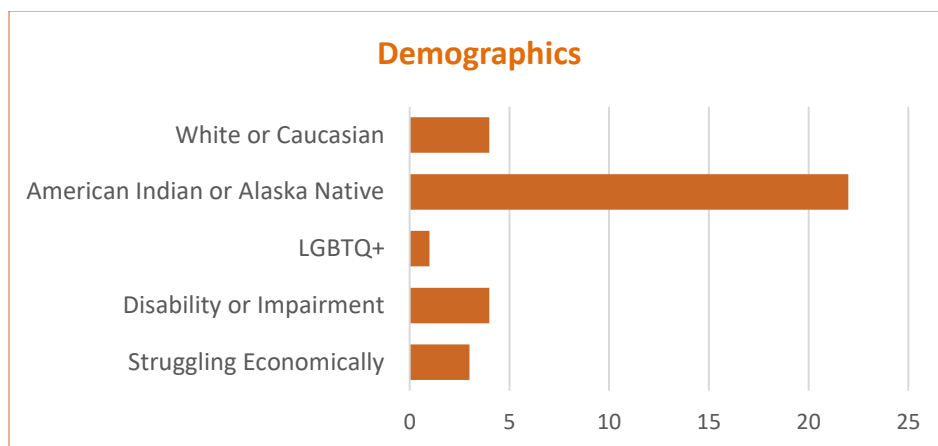
Who To Involve:

- Small businesses - all of them
- Associations - Dungeness

Annex 4: Taholah Survey Results

The 24 survey responses from in and around the Taholah community (a community on the Quinault Indian Reservation) represent a wide range of roles (ground owners, fishing guides, boat captains and owners, processors, wholesalers and distributors, crew and deck hands, among others). The “other” category includes primarily fishing guides and “ground owners,” that is, families and individuals who have allocations on different parts of the Quinault and Queets Rivers to fish or lease out to others. A diversity of ages is reflected, though a majority were over 45 years old, and a majority were female. Over 50% make less than \$50,000 per year. A majority of survey respondents identified as *American Indian or Alaska Native*.

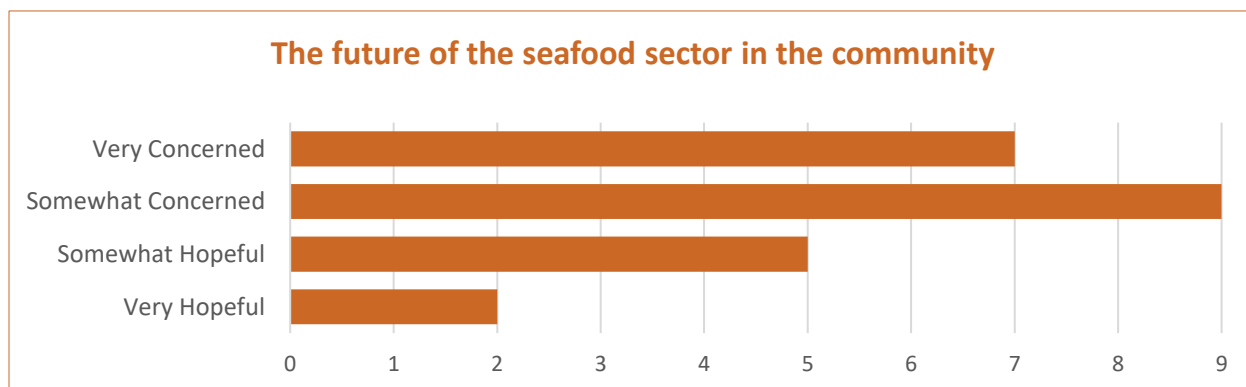




Categories that were not selected: Hispanic or Latino; Black or African American; Asian or Pacific Islander; Immigrant or DREAMer; English as 2nd Language; Veteran

In general, how do you feel about the future for fishing and seafood businesses in your community?

Over half are somewhat or very concerned about the future of the sector.

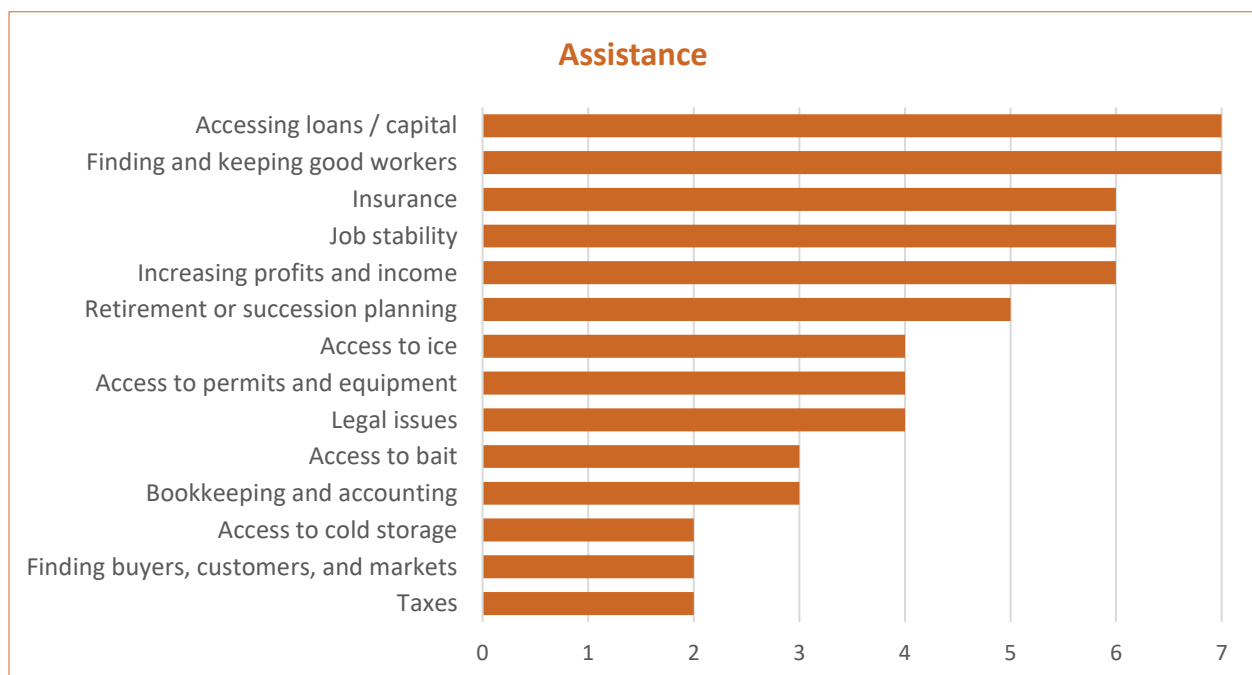
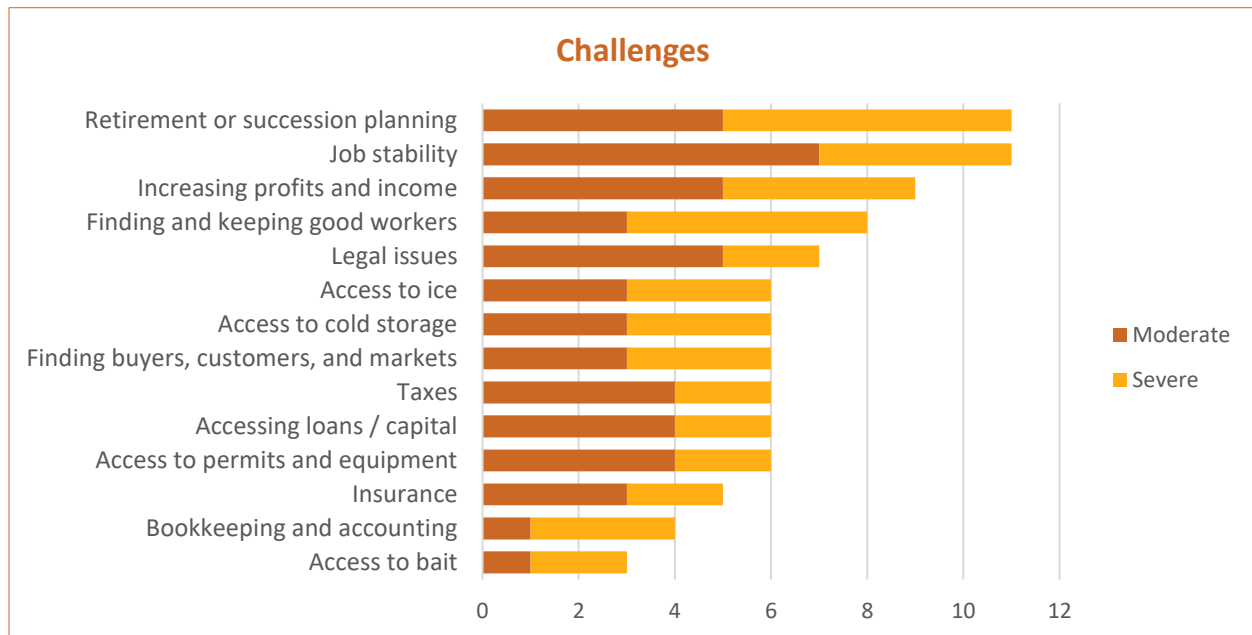


Over half of the survey respondents from Taholah are somewhat or very concerned about the future of the seafood sector, and they listed a variety of issues as cause for this concern. The most frequently listed issues include the following:

- **Declining fish numbers**, including salmon, clam, and crab, with a noticeable decrease over the years (mentioned by nine survey respondents);
- **Regulatory issues**, including restrictions related to using seafood resources for businesses, Title 51, ocean limits, Tribal council and enterprise committee restrictions (mentioned by five survey respondents);
- **Climate change and environmental issues**, domoic acid and climate change (mentioned by three survey respondents);

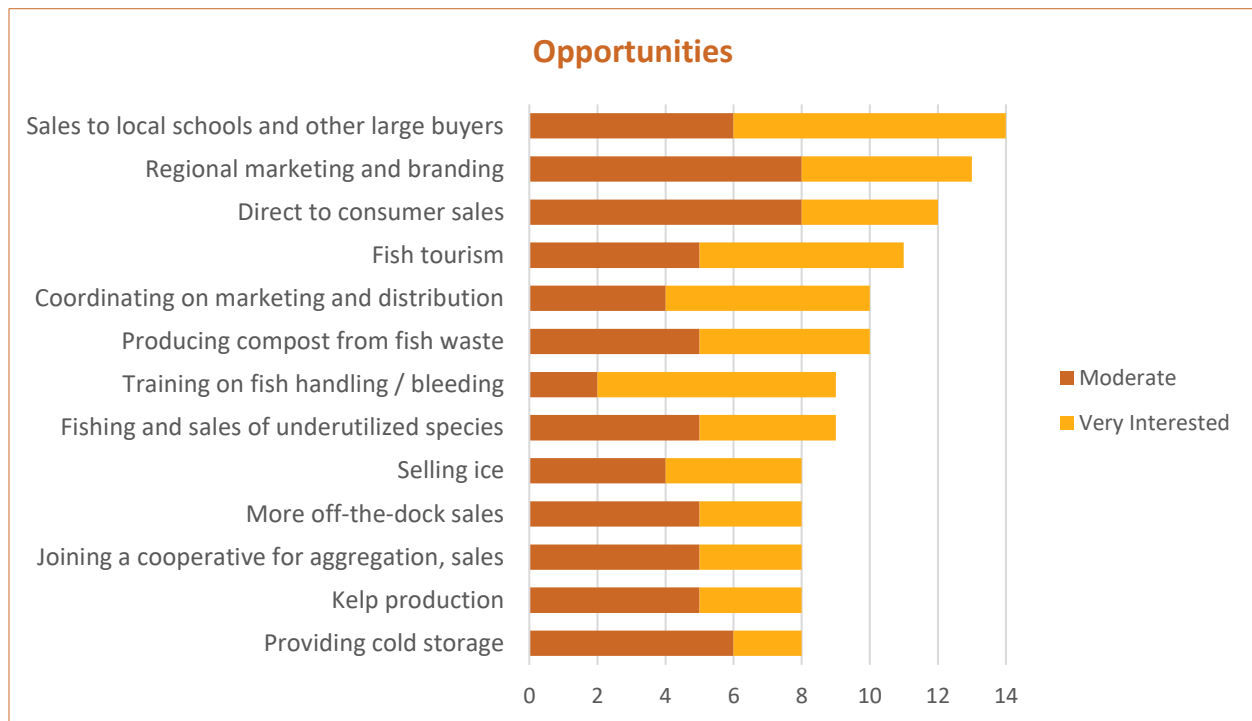
Challenges, Assistance, and Opportunities

Top challenges facing respondents are diverse, and include retirement and succession planning, job stability, increasing profits and incomes, finding and keeping good workers, legal issues, and access to ice and cold storage. Respondents indicated they wanted assistance with accessing loans and capital, finding and keeping good workers, insurance, and job stability.



Which of the following opportunities interest you the most?

There is significant interest in increasing marketing and sales.



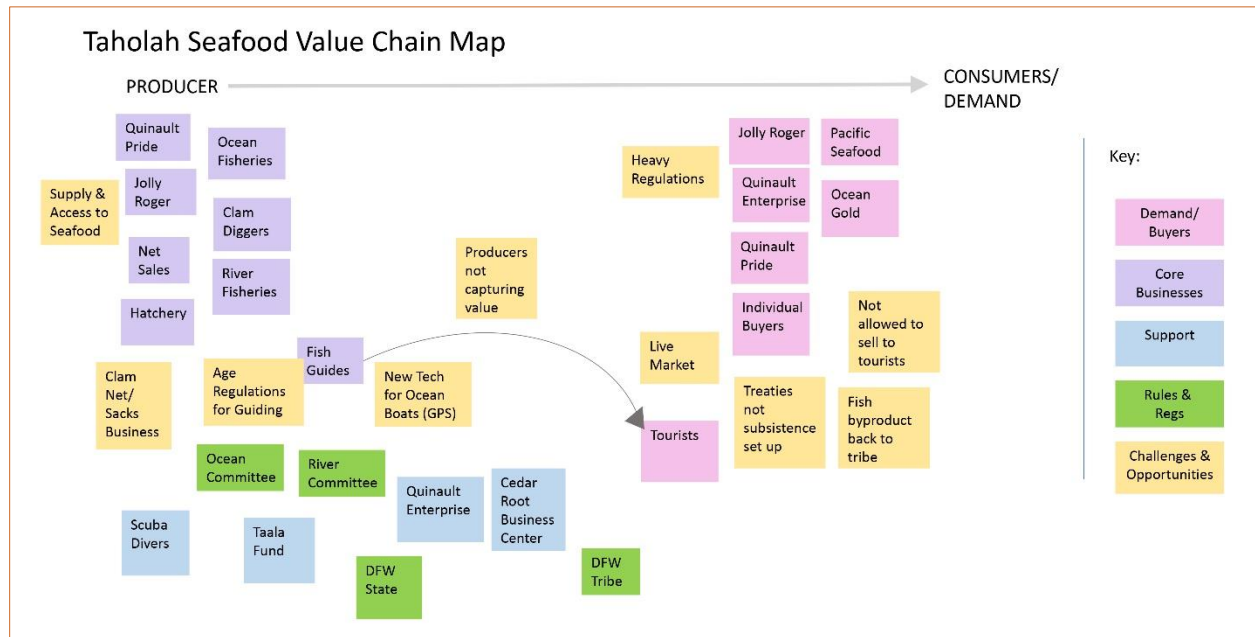
The six opportunities that received the most expressions of interest are related to marketing, distribution and sales, fish tourism, and producing compost from fish waste. Notably, ***sales to local schools and other large buyers*** is the opportunity of most interest.

Other areas of interest submitted in open-ended response include seaweed; fishing guide training and safety; building crab post; clean up watershed so fish can go up and spawn.

Annex 5: Taholah Community Meeting Results

The following are results from the workshop held in Taholah/Ocean Shores on April 15, 2022.

a. Taholah Value Chain Mapping Results



b. Taholah Feasibility Impact Analysis



The Taholah participants prioritized opportunities and challenges as follows:

1. Teach Youth to Make Surf Sacks (18 dots)
2. Age Regulation for Guiding (13 dots)
3. Ocean Fisheries Enforcement (Tribal) (8 dots)
4. New Tech for Ocean Boats (GPS) (7 dots)
5. More Independent Buyers (3 dots)
6. Fish Byproduct Back to Tribe (3 dots)
7. State Quotas Timing (2 dots)
8. Live Market (1 dot)
9. Treaties Not Subsistence Set Up (1 dot)
10. Not Allowed to Sell to Tourists (1 dot)

They then broke out into groups to discuss 1) lowering fishing guide age, 2) technology, 3) surf sacks, and 4) Ocean Fisheries LE.

Notes from Breakout Sessions

Lowering Fishing Guide Age Group

Currently 18: Goal – 14-16

No Limit on # guides

[focus on teaching]

- Passing on culture

Steps

- Business Committee
- Make a guide committee?
- Talk to a council person

Who Involved

- Whole fish committee (overall committee)
- Council
- Whole tribe
 - Tweetie & Mathew

Resources

- ?

Related Problem

- Fights over fishing holes
- Increase enforcement needed?

Technology

1. End of pirating fish
 - New industry: boat watchers
 - New industry: supplying technology

-
- Crab pot GPS
 - New source of revenue: penalties
2. Steps
 - Work with DFW for consistent regulations
 - Grant funds for equipment
 3. Who?
 - Tribal liaisons
 - E.g. Pacific NW Fisheries Commission
 - DFW leadership
 - WA state legislators
 - Tribal policy coordinators & council
 4. Funding for
 - Installation
 - Equipment
 - Enforcement
 - monitoring

Surf Sacks

\$; Traditional; Cultural; Knowledge; Market Outside Tribe

- teaching our youth, tribal members; buying supplies, learning, safety precautions class; community center or school
- teachers; community; parents; youth
- web, twine; needles; knives; plastic ring; army belt roll; funds; a market and surplus stores; advertising signs

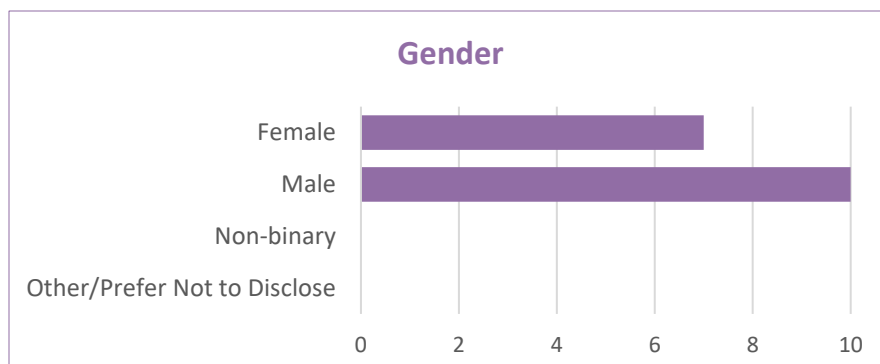
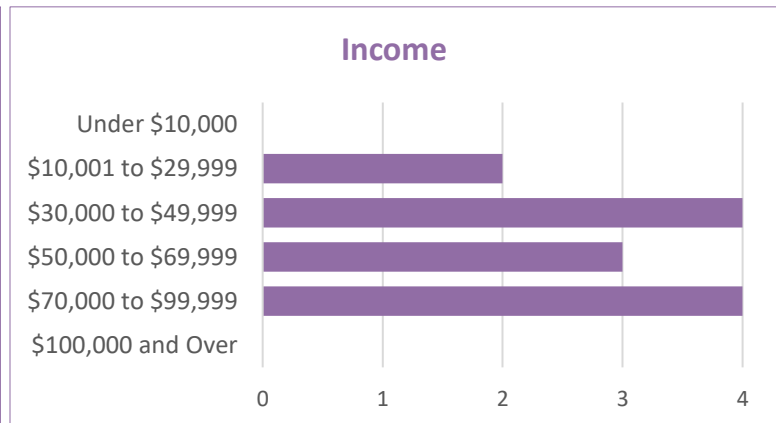
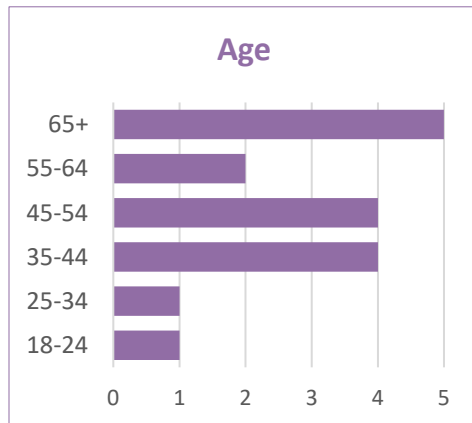
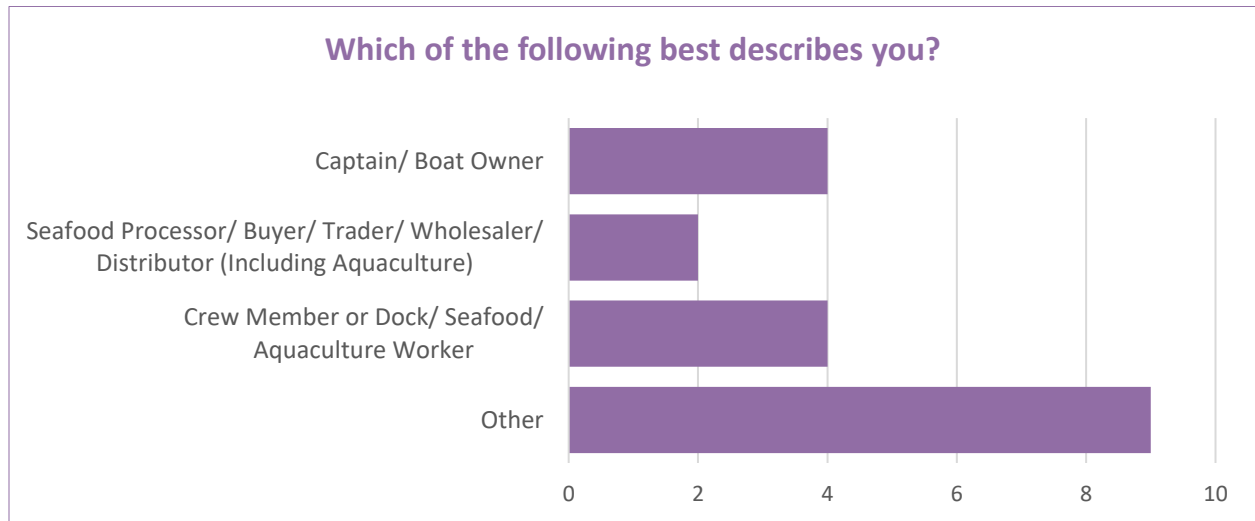
Ocean Fisheries LE

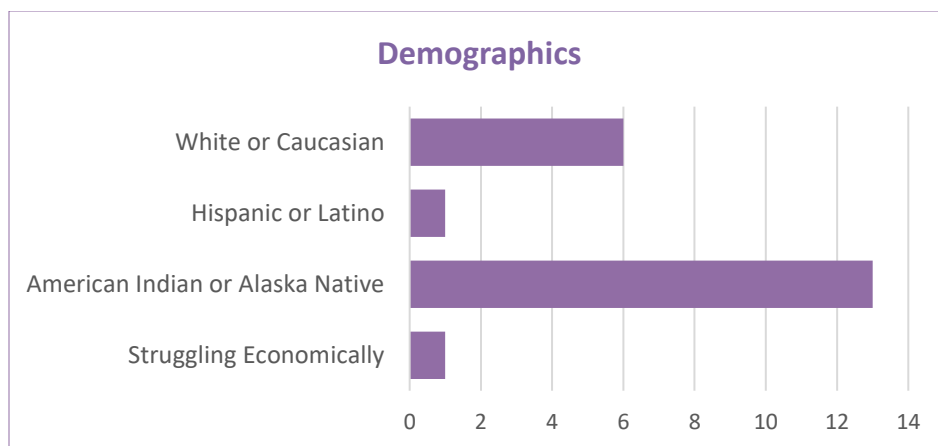
Expanding the treaty area! With 2 fisheries vessels.

1. Cost of vessel with equipment fully loaded and get funding from the tribe. Hire more LE and coast guard training. Start a petition for ocean enforcement that will go to our annual general council.
2. QIN Tribal members and tribal council.
3. Ocean committee, tribal council, tribal fisheries enforcement, QIN tribal members

Annex 6: La Push Survey Results

The 19 survey responses from the community of La Push (a community of the Quileute Tribe) represent a wide range of roles (boat captains and owners, processors, wholesalers and distributors, crew and deck hands, family members of fishermen, among others). The “other” category includes primarily family members. A majority were over 35 years old and male, and a majority of survey respondents identified as *American Indian or Alaska Native*.

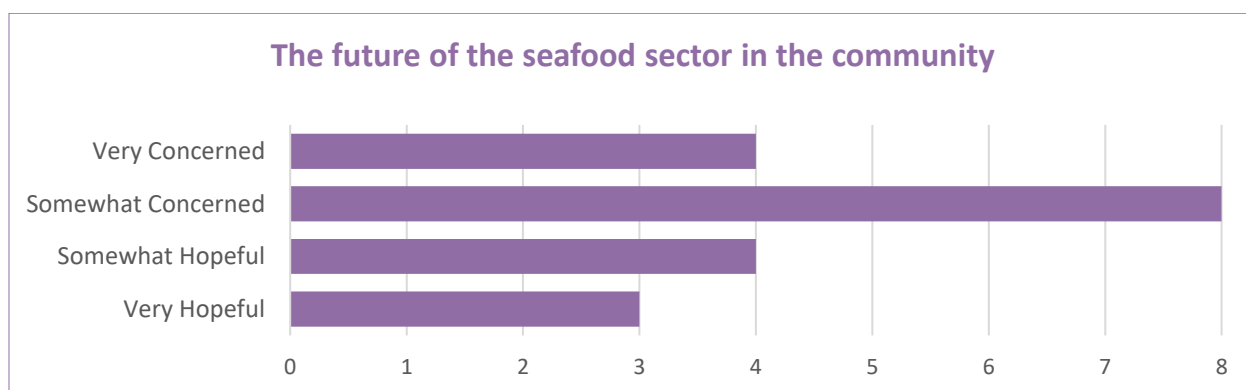




Categories that were not selected: Black or African American; Asian or Pacific Islander; Immigrant or DREAMer; English as 2nd Language; LGBTQ+; Veteran; Disability or Impairment

In general, how do you feel about the future for fishing and seafood businesses in your community?

Over half are somewhat or very concerned about the future of the sector.

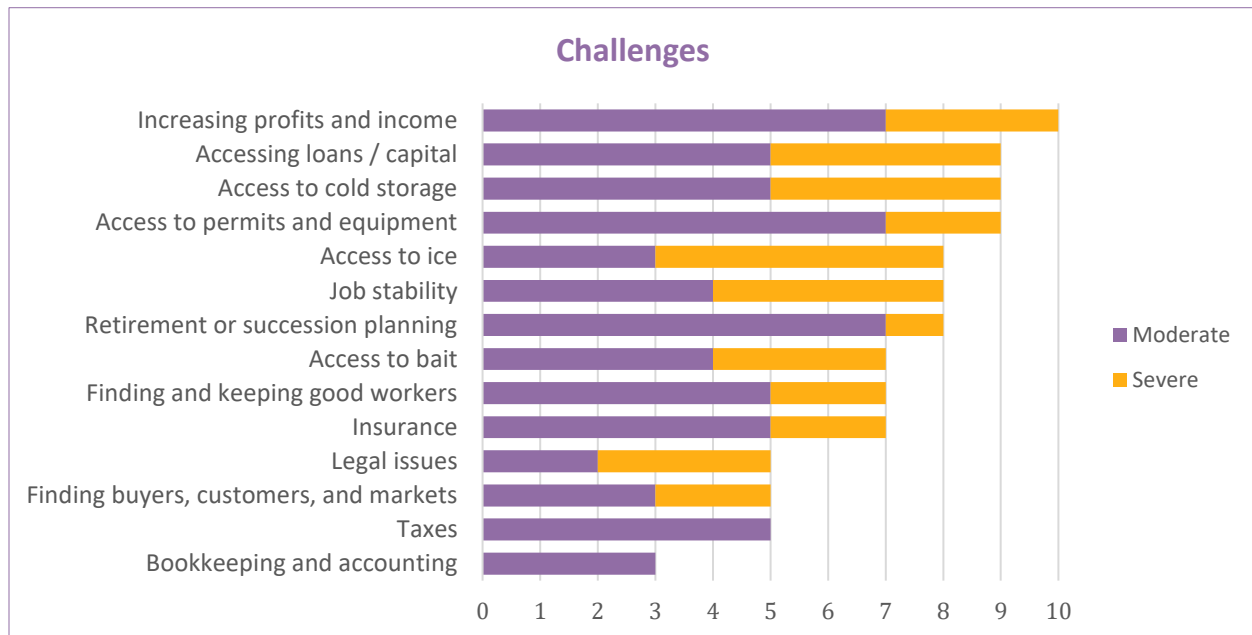


Over half of the survey respondents from La Push are somewhat or very concerned about the future of the seafood sector, and they listed a variety of issues as cause for this concern. The most frequently listed issues include the following:

- **Fewer fishermen**, as a result of younger people working in other industries and declining fish species (mentioned by five survey respondents);
- **Climate change** (mentioned by three survey respondents);
- **Closure of cannery/seafood processing plant** (mentioned by two survey respondents)

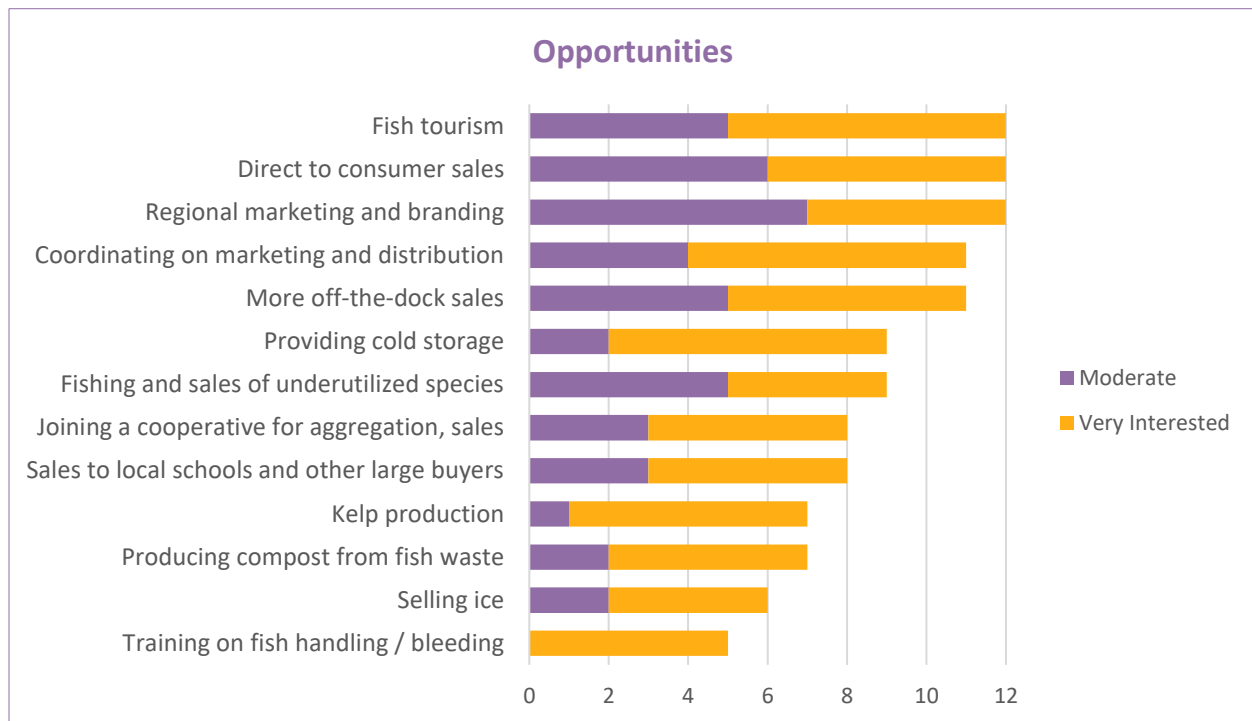
Challenges, Assistance, and Opportunities

Top challenges facing respondents are diverse, and include increasing profits and incomes, accessing loans and capital, access to cold storage, access to permits and equipment, access to ice, and job stability. Respondents indicated they wanted assistance with access to ice; increasing profits and income; and finding buyers, customers, and markets.



Which of the following opportunities interest you the most?

There is significant interest in increasing fish tourism, and marketing and sales.



The six opportunities that received the most expressions of interest are fish tourism, marketing, distribution and sales, and cold storage. Notably, ***fish tourism*** is the opportunity of most interest.

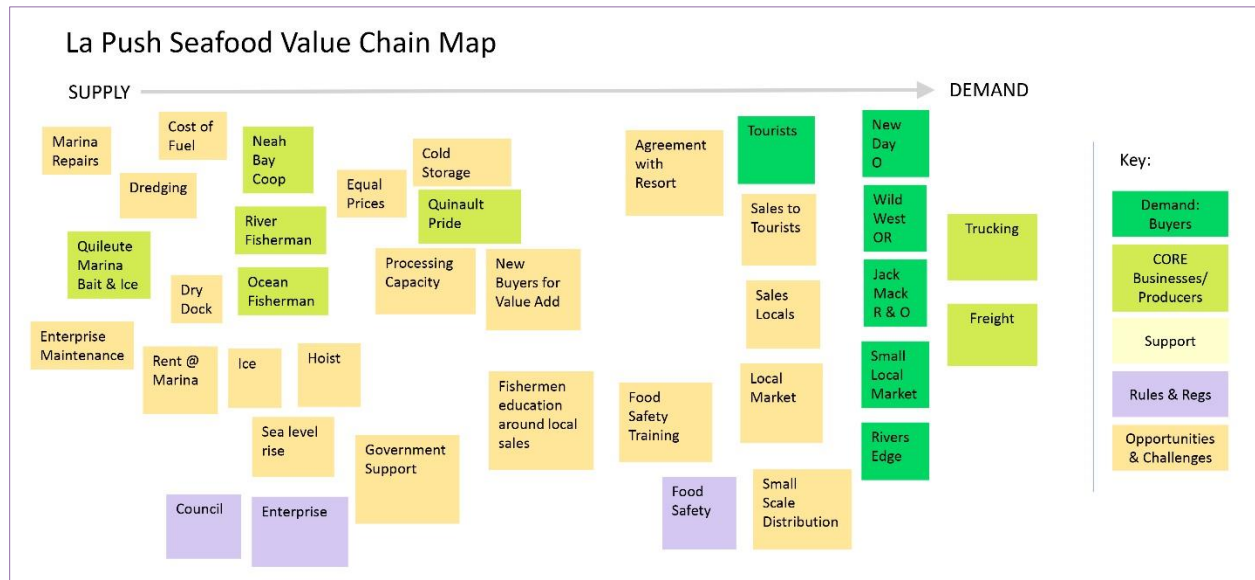
Another area of interest is producing fishing and sales of underutilized species.

Additional areas of interest that were not offered in the multiple choice options, but people mentioned in open ended questions, are fishing business opportunities (smoking, traditional, canning) – mentioned by three survey respondents – and access to grants (mentioned by two survey respondents).

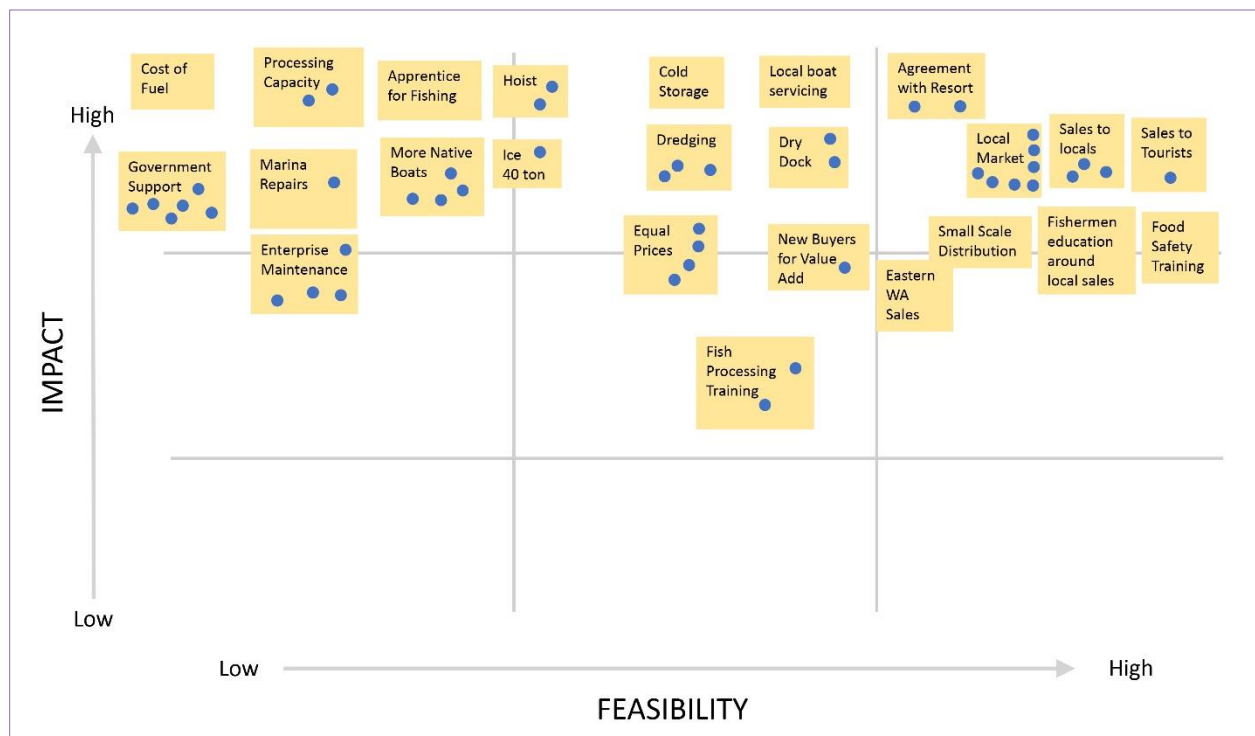
Annex 7: La Push Community Meeting Results

The following are results from the workshop held in La Push on April 16, 2022.

a. La Push Value Chain Mapping Results



b. La Push Feasibility Impact Analysis



The La Push participants prioritized opportunities and challenges as follows:

1. Local Market (7 dots)
2. Government Support (6 dots)
3. More Native Boats (4 dots)
4. Enterprise Maintenance (4 dots)
5. Equal Prices (4 dots)
6. Dredging (3 dots)
7. Sales Locals (3 dots)
8. Processing Capacity (2 dots)
9. Hoist (2 dots)
10. Dry Dock (2 dots)
11. Agreement with Resort (2 dots)
12. Fish Processing Training (2 dots)
13. Marina Repairs (1 dot)
14. Ice 40 Ton (1 dot)
15. New Buyers for Value Add (1 dot)
16. Sales to Tourists (1 dot)

They then broke out into two groups to discuss 1) More Quileute Boats, and 2) Quileute Government Support, and 3) Enterprise Maintenance.

Notes from Breakout Sessions

More Quileute Boats

Success: More boats- above min. of 7

Currently 4 active tribal boats

- captains are aging out
- Need 2-3 more not active
- 7 to ensure not leaving quotas on table
- Protecting and harvesting “usual and accustomed fishing grounds/boundaries” – “U+As”

[Might be an opportunity for a training program/career pathway]

Steps:

- Financing – look for grants/SBA loans
- Education
- Interested and qualified participants
- Training – young people

WHO: Enrolled tribal members who are qualified

- (privately owned)
- Financial org

Resources:

- Loan/grants – Craft3?
- Gear
- Certifications
- Deck hands
- Training program
- Maintenance
- Insurance

Local Market

- Fishermans Co-op
- Initial meeting – organize equality, who’s in charge, etc.
- All fishermen – young to old
- Marketing, storage, building, funding, permits

Quileute Government Support

Success:

- Healthy, happy, wealthy people

Steps:

- Meetings – general people involved

Resources

- The people, government, voices: no outsiders running things
1. Set goals – priorities – funding
 2. Listen to the voice of the people
 3. Open line of communication/by-all
 4. Re-assure a joint effort is going to take place
 5. Pull ears
 6. Elders speak listen/wisdom keepers
 7. Equality of all members

Enterprise Maint.

Success:

- Improved business/safety

Steps:

- Updated facilities
 - o Pumps – fuel
 - o Ice machines
 - o Hoist
 - o Update marina

Who needs involved:

- funding agencies/source
 - Enterprise
 - QTC
 - Enterprise fishers committee

Resources:

- Better marketing
 - Funding
 - Tribal government support
 - Enterprise fishers committee

Equal Market:

- Coop
- Quileute Pride
- Smoked fish
- Fish oil – vit.

Annex 8: Interview List

Westport

Molly Bold	Port Director
Greg Mueller	Director WA Trollers Association
Rob Bearden	Westport Mayor
Hilary Bearden	Dungeness Admin
Troy Meyers	Westport City Councilman
Larry Thevik	Chairman of WA Dungeness Association
Mike Cornman	Owner Westport Seafood Inc and Merinos
Jennifer Custer	WEfish Non-profit
Adrienne Jones	Owner Seafood Connection
Mikayla Evans	Owner Seafood Connection
Jenna Keeton	Sea Grant
Anna Kim	Resident
Perry Graham	Fisherman
Kim Roberts	Westport Winery
Owner	Tokeland Hotel
Owner	Aloha Alabama
Nikki Demmert	Fisherwoman, Chef
Shauna Best	Thyme and Tide

Taholah

Rex Rhoades	Boat Captain
Jim Stanley	Boat Captain
Chris Franks	Boat Captain
Van Ravendancer	Seafood Buyer
Sonny Davis	CEO Quinault Pride
Natalie Charley	Taala Fund
Tomi Charley	Fish Committee
James Blackburn	Clam Digger

La Push

James Jaime	Head of Quileute Enterprise
Emily Foster	Lonzo's Seafood
Frank Hanson	Olympic Natural Resources Center (UW)
Rio Jaime	Tribal Councilman
Jimmy Richeson	Fisherman
Sally Jaime	Fisherman
Corey Murphy	Fisherman
Darryl Penn	Fish Buyer – Chairman, Seafood Committee
Gene Ewan	Quileute Harbor Master
Rick Palumbo	Owner, Jack Mackerel Seafoods
Garrett Rasmussen	Quileute DNR Co-director
Zachary Jones	Vice Chairman of Tribe
Boo	Fishermen

Region

Kevin Decker	Sea Grant Economist
Brandii Holmdahl	Sea Grant
Garrett Dalan	The Nature Conservancy
Sarah Fisker	Sea Grant
Jeann Keaton	Sea Grant