

THE ALASKA MARICULTURE CLUSTER

Grant Evaluation
2023-2025
Executive Summary



Ecotrust

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Introduction

In December 2023, Southeast Conference (SEC) hired Ecotrust’s Measurement and Evaluation (M&E) team to provide grant evaluation services for the Alaska Mariculture Cluster (AMC), a Build Back Better Regional Challenge (BBBRC) grant, as part of its Grant Administration component.

The AMC Partnership

AMC has brought together a broad coalition of partners that include federal, state, and local agencies; Tribal governments, Tribally led nonprofit organizations, and Tribal corporations; financial institutions, private foundations, universities, and industry associations. Prior to the BBBRC grant, many of these organizations had never worked together.¹

Work to Date

Ecotrust’s grant evaluation activities to date have been:

- A Theory of Change for the AMC ²
- Indicators for each AMC Grant Component ³
- Progress updates on the AMC Targets
- Regular updates at Governance Body meetings
- A webinar in November 2025

Methods

Ecotrust’s methods used for grant evaluation have been:

- Analysis of AMC documentation and data
- Semi-structured interviews
- Regionally based focus groups
- A small sample survey
- Site visits and conference attendance

AMC Targets

At the outset of the grant, SEC and its partners in the AMC set targets for reaching Alaska Native and rural communities:

- Target 1: 25% of grant resources to benefit Alaska Native communities, and
- Target 2: 25% of grant resources to benefit rural communities. ⁴

¹ See Appendix A of the report.

² See Appendix B of the report.

³ See Appendix C of the report.

⁴ For the purposes of this grant evaluation, rural communities are defined as those outside Anchorage, Fairbanks, Juneau, or Ketchikan.

Analysis of work to date shows that AMC is on track to meet both targets, as shown in Figures ES-1 and ES-2 below.⁵

Figure ES-1. Number of AMC Funded Projects by Alaska Native Benefit and Rural Community Involvement⁶

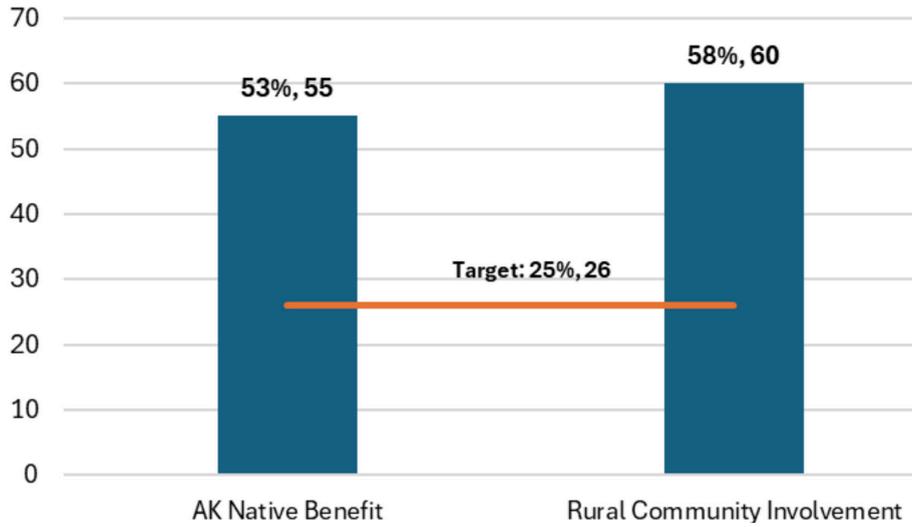
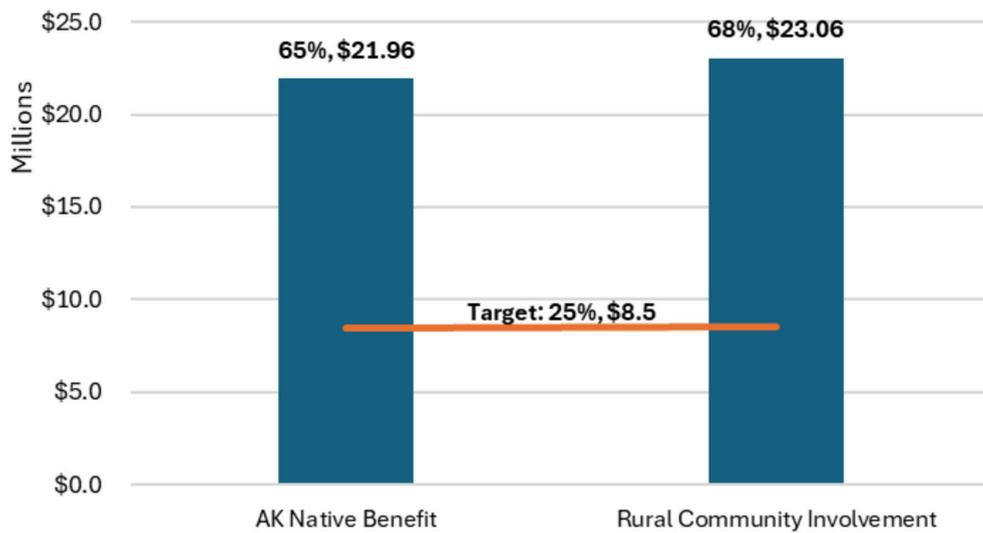


Figure ES-2. Value of AMC Funded Projects by Alaska Native Benefit and Rural Community Involvement



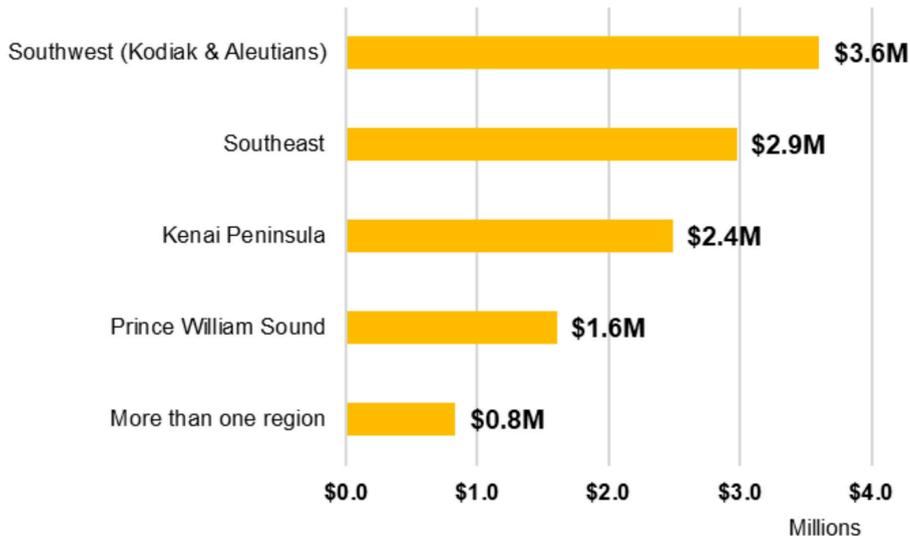
⁵ Criteria for inclusion of projects toward the targets are stated on pages 5-6 of the Report.

⁶ Excludes Match, projects Not Started, and Cancelled projects.

Where is AMC Investing?

Figure ES-3 presents the distribution of AMC funding awarded through RFPs, by target region. In total, AMC has issued 33 RFPs and awarded \$17.9M from those RFPs to date.

Figure 3. Distribution of RFP Funds by AMC Region (\$M) ⁷



Twelve Industry Challenges

Our evaluation report identifies twelve key Industry Challenges, of which each AMC project is addressing at least one. Table 2 below summarizes the Industry Challenges that are specific to the mariculture value chains (seaweed and shellfish); Table 3 below summarizes the Industry Challenges that cut across the whole mariculture industry.

Table ES-1. List of AMC Value Chain Challenges* (reproduced from Table 2 in the full report)

INDUSTRY CHALLENGE	NUMBER OF PROJECTS	COMBINED PROJECTS BUDGET
Site Selection & Permitting	2	\$1,299,386
Hatchery & Nursery Sector	25	\$5,609,317
Cultivation	13	\$1,347,850
Food Safety	3	\$4,305,047
Stabilization, Processing, & Distribution	27	\$5,247,276
Product & Market Development	26	\$4,759,361
Total	96	\$22,568,237

*Excludes Match, cancelled projects, projects not yet started, and projects uncategorized. This list is not mutually exclusive; projects that fall under more than one Industry Challenge are counted twice.

⁷ Includes RFP funding only. Excludes Match, projects Not Started, Cancelled projects, and RFP projects that target "All Regions".

Table ES-2. List of AMC Industry-wide Challenges* (reproduced from Table 3 in the full report)

INDUSTRY CHALLENGE	NUMBER OF PROJECTS	COMBINED PROJECTS BUDGET
Access to Capital	5	\$9,881,532
Access to Subsistence & Food Security	8	\$872,261
Governance & Administration	12	\$4,830,790
Innovation, Technology, & Data	7	\$1,621,916
Outreach, Communication, & Knowledge Exchange	10	\$3,330,052
Workforce Development	8	\$10,722,842
Total	50	\$31,259,393

*Excludes Match, cancelled projects, projects not yet started, and projects uncategorized. This list is not mutually exclusive; projects that fall under more than one Industry Challenge are counted twice.

Key Indicators of Progress

In 2023-2025, measurable achievements of the AMC included:

- 48 new pieces of processing equipment awarded, with total value of \$3.45M
 - Of these, 24 awarded to Alaska Native entities, worth \$2.3M
 - Key Quote: “The drying equipment is a big win for anybody growing seaweed in the region.” - Focus Group participant
- 5 new broad mariculture product categories explored, primarily focused on seaweed
 - Key Quote: “With seaweed, you need a multitude of different products.” - Focus Group participant
- 12 new mariculture species cultivated, of which 4 are seaweed and 8 are shellfish
- 15+ methods of stabilization and processing pilot tested
- 41 new pieces of hatchery and nursery equipment awarded, with a total combined value of \$5.3M.
 - Of these, 15 were awarded to Alaska Native entities, worth \$1.3M
 - Key Quote: “The infrastructure of our hatchery is 100 times better than it was before.” Focus Group participant, Prince William Sound
- 906 trainees across University of Alaska, Prince William Sound College, and Sea Grant workforce development programs, and Native Conservancy immersion trainings.
 - Key Quote: “Probably the most amazing thing I’ve done in my life.” - Interviewee, regarding the Mariculture Occupational Endorsement Certificate (OEC) at University of Alaska
- 867 attendees at technology transfer and knowledge exchange sessions

New Product Categories

In addition to the increased number of mariculture species cultivated, AMC funded research and development has tested and explored five (5) new top-level categories of mariculture products, of which the majority are focused on seaweed. Table ES-3 below summarizes these product categories.

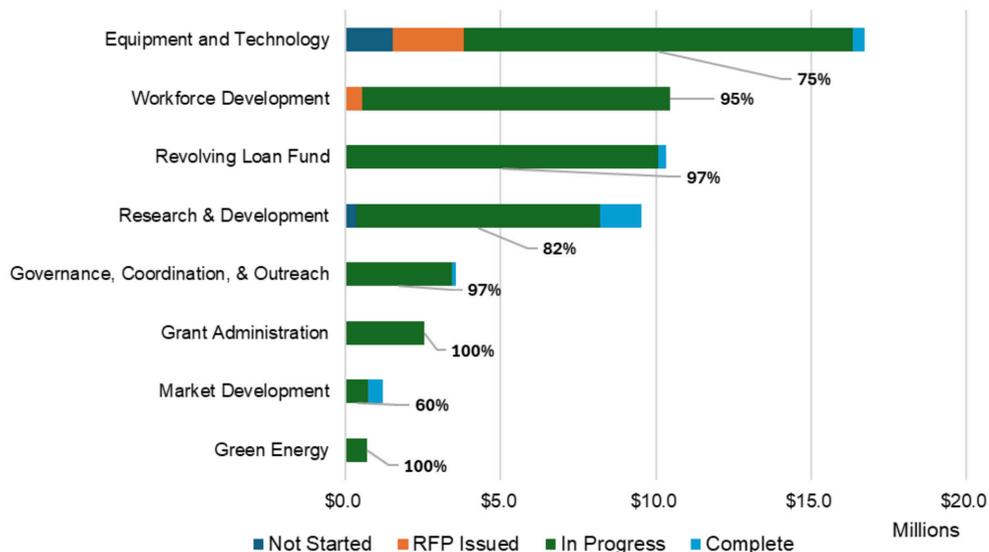
Table ES-3. List of Mariculture Product Categories Tested/Explored (reproduced from Table 11 in the full report)

Agricultural Products
Carbon Credits
Fresh and packaged food products and ingredients
Health and beauty products
Wine/spirits

Conclusion: Work in Progress

AMC has made progress toward resolving all twelve of the Industry Challenges identified above, but significant work remains to be done in the last year of the grant. Many of AMC's intended Theory of Change outcomes, particularly those tied to increased scale of production, are not yet observable. Figure ES-4 below summarizes all AMC expenditures by grant component, by status, showing that over 75% of all project work is still In Progress.

Figure ES-4. AMC Funding Status, by Grant Component (reproduced from Figure 8 in the full report)⁸



⁸ Excludes Match

Though it is still too early to measure many of the intended outcomes, most AMC funding recipients interviewed have expressed enthusiastic appreciation for the grant. Some mariculture affected parties are still waiting to understand the industry's trajectory before committing to large-scale investments in it. The quotes below provide examples of these responses.

AMC Affected Parties In Their Own Words

The following quotes from interviewees and focus group participants illustrate AMC affected parties' perceptions of the grant's impact:

- "It's too early to call it a massive success, but I think we'd be on a different trajectory if it had not occurred." - Focus Group participant
- "It's been a fantastic resource for the industry." - Focus Group participant
- "We're still at a point where we need more information: market costs, what markets are available, and an overall marketing aspect for rural communities." - Focus Group participant
- "I think we'll look back and say that AMC has significantly changed the trajectory of mariculture in Alaska in a positive direction." - Focus Group participant