

**Aggregation of Seafood Resources across
Indian Country:
Feasibility of the Buy Indian Program**

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Abstract

The Tribes of the Pacific Northwest are in a unique position to leverage their resources through aggregation of resources across Indian Country. Due to Treaties, signed with U.S. government in the mid to late 1800s, the Tribes in the Pacific Northwest have the right to fish and harvest up to 50% of all the wild seafood species in the waters of the Pacific Northwest. In addition, almost every Tribe in the region views seafood, especially Salmon, as an important cultural and environmental link to the region. Salmon is intricately a part of numerous ceremonies, programs, and Tribal businesses. Unfortunately, many Tribes do not use or buy Salmon caught by their own Tribe or other Tribes in the region.

The Affiliated Tribes of Northwest Indians (ATNI) is non-profit inter-Tribal organization that has proposed a Buy Indian Program, by which Tribes can sell and buy resources across Indian Country. The Buy Indian Program would keep value within Indian Country, while developing and promoting the economies of the most number of Tribes and Tribal members as possible. The purpose of the project is to determine the feasibility of implementing such a program across Indian Country in the Pacific Northwest. The study involves the use of interviews and surveys of Tribal Leaders, Business Managers, Tribal Seafood Processors, Tribal Fishermen to determine, the consumer needs, processing capability, availability of resources and products, and possible distribution networks across the region.

The results of the Tribal interviews illustrate an Indian Country fraught with barriers and obstacles at all levels that may be difficult to overcome in order to achieve the Buy Indian Program. Although, the program faces many challenges there are a multitude of solutions and opportunities to further developing the Program. If the Buy Indian Program is to see success ATNI may need to approach the Program through top-down and bottom-up approaches. ATNI could work towards implementing and developing new Tribal government policy while at the same time developing and enhancing the capacity of Tribal fishermen across the Pacific Northwest.

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Executive Summary

The Tribes of the Pacific Northwest are in a unique position to leverage their resources through aggregation of resources across Indian Country. Due to Treaties, signed with U.S. government in the mid to late 1800s, the Tribes in the Pacific Northwest have the right to fish and harvest up to 50% of all the wild seafood species in the waters of the Pacific Northwest. In addition, almost every Tribe in the region views seafood, especially Salmon, as an important cultural and environmental link to the region. Salmon is intricately a part of numerous ceremonies, programs, and Tribal businesses. Unfortunately, many Tribes do not use or buy Salmon caught by their own Tribe or other Tribes in the region.

The Buy Indian Program

The Affiliated Tribes of Northwest Indians (ATNI) is a non-profit inter-Tribal organization, consisting of 57 member Tribal governments, which has proposed a Buy Indian Program, by which Tribes can sell and buy resources across Indian Country. The Buy Indian Program would keep value within Indian Country, while developing and promoting the economies of the most number of Tribes and Tribal members as possible. The Program is being headed by ATNI's Economic Development Corporation, whose aim is to promote economic development across the member Tribes. The purpose of the project is to determine the feasibility of implementing such a program across Indian Country in the Pacific Northwest. The Program is also aimed towards expanding the Pacific Northwest brand not only within the Pacific Northwest but in national and international markets where possible. The value of the Buy Indian Program includes:

- Reestablishing Old Pacific Northwest Trade Networks
- Promoting Inter-Tribal Collaboration
- Keeping Value in Indian Country
- Recognizing Climate Change
- Using Tribal Sovereignty
- Developing Regional and Local Food Systems

Findings

Tribal Leaders, Tribal consumers (Casinos), Tribal seafood processors, and Tribal fishermen were contacted for the purpose of this feasibility report. Individuals within all groups were each invited to participate in a one-on-one interview in person, via phone, or email. Interviewees included: casino managers, casino head chefs, Tribal leaders, Tribal government department heads, Tribal program managers, Tribal business managers and purchasing officers. Some of the major findings and results of the interviews are summarized below per group.

Tribal Leaders:

- While ATNI's Economic Development Corporation has clear guidance and vision for the Buy Indian Program, Tribal Leadership demonstrates no collective and clear vision or goals of the Buy Indian Program.
- Few Tribal governments have or enforce "Buy Indian" policies within the government or Tribal businesses.

Tribal Consumers:

- Previous research and studies indicate there is a conception amongst businesses that Tribal seafood is poor in quality.
- Tribal businesses indicated that the business was unwilling to pay premium to support other Tribal businesses, due to best price for the best value policies.
- As with any business, Tribal businesses demand a reliable distribution and consistent transportation of products to the business.

Tribal Seafood Processors:

- Seafood processors have the capacity to process any seafood product desired by consumer.
- Individual seafood processors are only capable of processing certain seafood species or conducting specific processing methods.
- Few processors operate year-round; processors rely on local fishing seasons and openings, which is the only time the processors run at full capacity.

Tribal Fishermen

- Over 200 Tribal fishing boats geographically dispersed across the region.
- Most Tribal fishermen lack formal business training which can hinder their ability to grow and succeed as a business.
- Tribal fishermen struggle to gain access to capital and thus lack basic capacity for improving fishing practices for bigger and quality fishing.

Recommendations

The interviews conducted to determine the feasibility of the Buy Indian Salmon Program revealed several barriers to the program in its current form. The identified barriers will be difficult to overcome in the near future. As a result of the findings and results of multiple interviews and observations, two approaches for the Buy Indian Program are recommended. ATNI should consider pursuing top-down and bottom-up approaches within and across Tribes to promote the development of the Tribal seafood industry. Top-down approaches would involve working with all member Tribes, and their governing body, and developing policies. Bottom-up approaches would consider the capacity of individual Tribal fishermen of the roughly 200 Tribal fishermen found throughout the Pacific Northwest. The most pertinent recommendation is to continue to develop the program through small business connections and opportunities as the opportunity arises. ATNI should consider a pilot program with a few Tribal governments and businesses, two to four Tribes, that can develop the program further and gain buy in from other Tribes as the program blossoms.

Top-Down Approaches:

1.1. Recommendations for ATNI and the EDC

1.1.1. Facilitate a visioning process for the Buy Indian Program

1.1.2. Develop relationships across Indian Country which further develop and support the Buy Indian Program

- 1.1.3. Continue to develop opportunities and connections, which build and expand the Buy Indian Program
- 1.1.4. Work with the Tribal fish commissions to take advantage of the opportunities already developed at ATNI, the EDC, and the fish commissions
 - Conduct a feasibility assessment of developing centralized distribution network

1.2. Develop, use, and enforce “Buy Indian” policies within Tribal governments and businesses

Bottom-Up Approaches:

- 2.1. Connect and pursue outreach strategies that connect geographically dispersed Tribal Fishermen
- 2.2. Build the capacity of Tribal seafood processors to operate throughout the year
- 2.3. Build the capacity of Tribal seafood processors to operate throughout the year
- 2.4. Conduct and/or connect Tribal fishermen to business training opportunities
- 2.5. Connect Tribal fishermen and processors to local, regional, and international markets
 - 2.5.1. Develop Tribal business’s access to local markets
- 2.6. Consider developing the capacity of Tribal Fishermen to process their own catch for sale Mobile Canneries
 - 2.6.1. Conduct a feasibility study for pursuing mobile canneries
 - 2.6.2. Conduct a feasibility study for pursuing mobile flash freezing
- 2.7. Develop and support Tribal fishermen’s access to capital

Conclusion

The Buy Indian Program is an economic development strategy the Affiliated Tribes of Northwest Indians and ANTI’s Economic Development Corporation have been working towards in order to build and retain the economic value of Tribal seafood products across Indian Country. The Program has great economic potential and cultural value within Indian Country. The findings of this report based on interviews with multiple Tribal leaders, businesses, seafood processors, and fishermen reveal an Indian Country fraught with problems and barriers that make a Buy Indian Program unlikely as one unifying economic development program. The idea of widespread participation in the Program is unlikely in the Programs current state, but a smaller pilot program may be possible with a few Tribes. Although the Buy Indian Program faces many barriers, the Program has been making small steps toward progress through various business connections and opportunities as they arise. In addition, a number of solutions are available to ATNI and member Tribes if further pursuit of the Buy Indian Program is desired within ATNI. Even through the identified solutions, the Buy Indian Program may face too many barriers to developing into a healthy and beneficial program within Indian Country and the Pacific Northwest.

Chapter I - Introduction

The Tribes of the Pacific Northwest have maintained a long tradition of fishing the waterways of the region. Salmon, in particular, is considered one of the most important foods traditional, culturally, and dietary. When the U.S. Government started making treaties with the Pacific Northwest Tribes, one right the Indians managed to maintain across Tribes was the right to continue fishing the waters. Due in part to civil litigation brought up in the States of Oregon and Washington, the Tribes today still maintain the rights to 50% of all the wild fish and seafood species harvested from the waters of the Pacific Northwest. If the Tribes were to aggregate all the wild fish and seafood species and work together to sell and market Pacific Northwest Indian Seafood within Indian Country, nationally, and internationally. The Tribes and Tribal seafood processors have the potential to become a major player and break into a major industry.

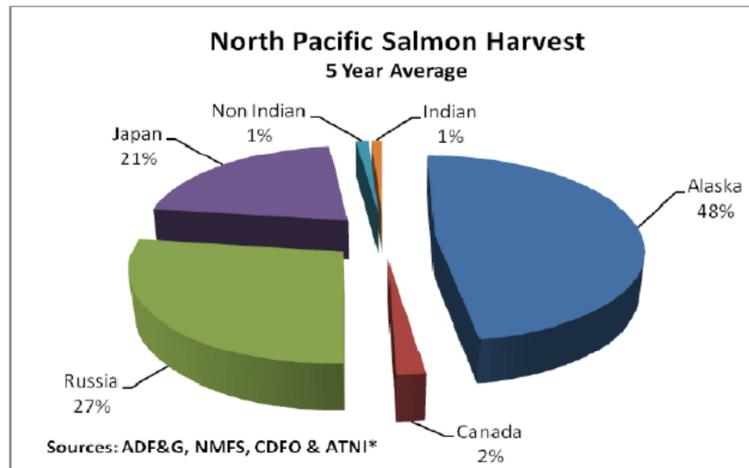
The Affiliated Tribes of Northwest Indians (ATNI), a non-profit based in Oregon is currently seeking ways in which to have the Tribes work together and aggregate the seafood resource into a product line that can be sold and marketed within Indian Country. The Economic Development Corporation (EDC) of ATNI has been placed in charge of the endeavor. The following report is an effort to determine whether or not such a program is feasible. The feasibility study consists of four areas of focus and through interviews with key stakeholders in the potential program. The four focus areas included Tribal Leadership, Tribal Businesses and Consumers, Seafood Processors, and Tribal Fisherman. The following sections will provide an overview of the Buy Indian Program, ATNI, and the current state of Pacific Salmon.

Specific Aims and Objectives

According to information reported by ATNI-EDC for the development of this plan, tribal harvests of all species of salmon have averaged 16.2 million pounds for the past five years. This volume represents 1% of the total wild salmon harvest in the northern Pacific Ocean, which is dominated by Alaska at 48%. Please note that all percentages in the charts in this section are based on volume in pounds. Figure 1 shows the breakdown of harvest by producing country. The U.S. production of wild salmon from the states of Washington, Oregon and California, both Indian and non-Indian, is 2% of the overall volume of pounds, making tribal harvests one-half of the wild salmon production of this region.¹ The above information and Figure 1 below illustrate that the Tribes of the Pacific Northwest have roughly half of wild harvest of salmon, this does not even show their share of other seafood species, yet the Tribes only represent 1% for the international market. It is important to note that the data reflects a collective number, yet the Tribes are not working collectively. What the numbers indicate is that if the Tribes could work together they have the potential to represent half the market in the Pacific Northwest and potentially break into the larger international market.

¹ Affiliated Tribes of Northwest Indians, Economic Development Corporation. (2010). *Buy Indian Program: Indian Salmon Marketing Plan*. Madras, OR: Cultural Horizons Associated, LLC.

Figure 1



*Alaska Dept. of Fish & Game, National Marine Fisheries Service, Canada Dept. of Fisheries and Oceans, and Affiliated Tribes of Northwest Indians.

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The research objectives of this report are to better understand the feasibility of establishing a Buy Indian Program with Pacific Northwest Tribe's seafood resources. The research will answer three specific research questions:

- What are the barriers and obstacles to a successful Buy Indian Program?
- What are the benefits and opportunities identified by the Tribal stakeholders?
- Is the Buy Indian Program a feasible program for ATNI and the EDC for and with its member Tribes?

By answering the above core areas research, the final product will consist of a report that can be used by ATNI and member Tribes to market, expand, and gain buy in into the Buy Indian Program. This report would, in theory, demonstrate the economic potential of the Tribes aggregating their vast and potential hold on the seafood resources across the states of Washington and Oregon. The feasibility report could be used by ATNI, the EDC, and member Tribes to determine the future of the program.

Affiliated Tribes of Northwest Indians

ATNI is a non-profit organization based in Oregon, founded in 1953 in order to serve the Tribes and Indian peoples of the Northwest. ATNI currently represents 57 Tribal governments across Washington, Oregon, Idaho, Northern California, Southeast Alaska, and Western Montana. The principal purpose and goals of ATNI comprise:³

- Provide forums for the exchange of information of matters of mutual concerns among member Tribes and their constituencies.
- Provide processes for the development of consensus on policy and positions on issues.

² *Ibid.*

³ Affiliated Tribes of Northwest Indians, "Principals, Purpose & Goals of ATNI." Accessed May 11, 2013. <http://www.atnitribes.org/principals-purpose-goals-atni>.

- Provide recommendations for legislation and government policy on behalf of ATNI and member Tribes.
- Monitor, collect information, analyze data, disseminate findings and develop policy positions on matters of interest to ATNI and its member Tribes.
Provide technical assistance, benchmarking, (standard setting), education, and training to ATNI and its member Tribes.
- Establish and maintain mutual assistance networks and foster strategic alliances between ATNI, its member Tribes, and beneficial organizations.
- Provide for effective public relations and education program to non-Indian communities on behalf of ATNI and its member Tribes.

The above principles are important to keep in mind, as the principles lay the foundation for inter-Tribal cooperation and collaboration. ANTI provides a mutual beneficial organization that makes programs like the Salmon Marketing Program and the Buy Indian Program possible in Indian Country.

The following 27 ATNI member Tribes currently conduct commercial fisheries operations and would be the focus of the Buy Indian Program:

- | | |
|--|-----------------------------|
| • Chehalis Tribe | • Nooksack Tribe |
| • Confederated Tribes of the Umatilla Indian Reservation | • Port Gamble S’Klallam |
| • Confederate Tribes of Warm Springs | • Puyallyp Tribe of Indians |
| • Hah Indian Tribe | • Quileute Indian Tribe |
| • Hoopa Tribe | • Quinault Indian Nation |
| • Jamestown S’Klallam Tribe | • Sauck-Suiattle Tribe |
| • Lower Elwha Klallam Tribe | • Skokomish Tribe |
| • Lummi Nation | • Squaxin Island Tribe |
| • Makah Indian Tribe | • Stillaguamish Tribe |
| • Muckelshoot Tribe | • Suquamish Tribe |
| • Nez Perce Department of Fisheries | • Swinomish Tribe |
| • Nisqually Indian Tribe | • Tulalip Tribe |
| | • Upper Skagit Tribe |
| | • Yakama Nation |
| | • Yurok Tribe |

Economic Development Corporation

As a result of long-range planning and the economic development needs of ATNI and its member Tribes, in 1996 the Economic Development Corporation (EDC) was formed under the auspices of ATNI. The mission of the ATNI Economic Development Corporation is “to act on the Member Tribes’ behalf with respect to income producing enterprises collectively owned by the Tribes, providing economic development as a separate and distinct entity from the Tribal Governments”.⁴ The ATNI EDC staff and consultants work collaboratively to serve ATNI member tribes through various programs.

The current Director of the EDC is Mike Burton. Mr. Burton has been the leading the main efforts to push forward with the Salmon Marketing and Buy Indian Programs. To determine the

⁴ Affiliated Tribes of Northwest Indians, "EDC." Accessed May 11, 2013. <http://www.atnitribes.org/edc>.

feasibility of the Buy Indian Program across Indian Country Mr. Burton reached out to the University of Oregon's Community Service Center (CSC). The CSC started a feasibility assessment of the Buy Indian Program in the Fall of 2012 and the following report is the findings, results, and recommendations for proceeding with the Buy Indian Program under ATNI-EDC.

Chapter 2 - Buy Indian Salmon Program

The concept of the Buy Indian Salmon Program has been around since the 1940s. The idea of Buy Indian is to promote the buying of Indian made products and commodities. The program could be promoted at any level and across communities. The purpose of the Buy Indian Salmon Program in its current state is to promote Tribal governments and businesses buying Tribal produced products from other Tribes and Tribal businesses.

As stated earlier, the program has been around in concept since the 40s, amongst various Tribes and across Indian Country. In July 2010, the Affiliated Tribes of Northwest Indians developed the Salmon Marketing Program through grants from the EDA and USDA. The purpose of the Program is to add value to Tribal fishers' and harvesters' catches and keep more of the value added chain in Indian Country. Since its inception in 2010, the Program staff and stakeholders have assisted over 125 tribal fishers, harvesters, individuals, and businesses and generating an economic impact of over \$1 million through new sales, increased revenues, and higher premiums.⁵

The Value of the Program

The Buy Indian Program may face many challenges in order to come to fruition, but it has a multitude of value within and beyond Indian Country. The following section lays out several opportunities and the purported benefits of a Buy Indian Program.

1. Keeping Value in Indian Country

At the most basic level, buying products within Indian Country for Indian Country will help keep money within Indian Country. Although Indian Country can be viewed more of a regional level than a local level the principles of buying local can still apply. Research has shown that when consumers and/or wholesalers "buy-local" twice as much money stay in the local economy.⁶ In other words the buying local is twice as efficient in keeping the local economy alive. Even at the regional level of the Pacific Northwest, the Buy Indian Program has the potential to keep Indian Country economies alive and even bolster Tribal economies.

2. Better Prices at the Dock

If tribally caught seafood is purchased by Tribal seafood processors and/or Tribal businesses, Tribal entities could conceivably offer better prices to Tribal fishermen right at the dock. Currently, Tribal fishermen are limited to who their catch can be sold to with a few major seafood processors monopolizing the wholesale purchase of seafood catch and thus are also able to control price.

3. Inter-Tribal Collaboration

Within Indian Country there are multiple opportunities for Tribes across the Pacific Northwest to work together and foster support of one another. Inter-Tribal conflict that spans years of history should be mended in order to promote a stronger and unified Indian Country. The Buy Indian Program provides an opportunity for Tribes to bridge these divides and conflicts. Organizations like ATNI were formed exactly for this purpose.

⁵ Affiliated Tribes of Northwest Indians, "Salmon Marketing Program." Accessed May 11, 2013. <http://www.atntribes.org/salmon-marketing-program>.

⁶ Schwartz, Judith. "Buying Local: How It Boosts the Economy." *Time*, June 11, 2009. Buying Local: How It Boosts the Economy (accessed May 20, 2013).

4. Old Pacific Northwest Trade Networks

For centuries prior to European settlement of the West, the Tribes of the Pacific Northwest and beyond have been trading with one another. An entire trade language, Chinook Jargon, was developed in order for Tribes to communicate and barter with one another. The ancient Tribal networks involved the trading of Indian produced goods, fish, and agricultural goods. Archeologists have found products originating in the Pacific Northwest as far East as Michigan and as far South as Mexico.⁷ The Buy Indian Program is an opportunity to rebuild ancient trade networks which were a vital part of Tribal economies and culture over the centuries and could be again in the modern era.

5. Regional and Local Foods

A popular trend, that is only predicted to increase, is buying local foods. In 2012 article from the international *British Food Journal*, researchers revealed that major changes in food consumption are occurring world-wide, including the U.S., which indicates consumers are shifting towards buying local foods were possible.⁸ For people who express a strong intention to purchase local food, this behavior is linked to the types of food they eat (e.g. unprocessed foods), where they buy it (e.g. at specialty stores), and how they cook it (e.g. follow recipes).⁹ Consumers who express an interest in purchasing local food are a demanding segment of the population whose interest in food makes them critical judges of produce. Local food must thus be fresh and value for money. Consumers want to know where and from whom their food is coming from. Consumers also want to buy from and support local businesses, fishermen, and farmers. As a result, more and more restaurants and small businesses are requiring an increasing volume of local foods to meet demand. Tribally caught seafood is a perfect example of a locally, and even more so, regionally preferable food. In the Pacific Northwest, Salmon in particular, is a symbol of the entire region. Salmon has a major cultural value, not only to the Tribes, but for the population of the Pacific Northwest. If Tribes are able to provide tribally caught seafood within their businesses and restaurants the Tribes will enter a market that is only expected to expand and grow for the foreseeable future.

6. Tribal Sovereignty

The Buy Indian Program is an opportunity for Tribes to exercise their own sovereignty. Being that the Tribes have sovereignty over their own lands and businesses that exist on their lands, the Tribes are in a unique position to develop Inter-Tribal business opportunities that will not be subject to various state and local tax structures that affect the rest of the seafood industry.

7. Climate Change

During the 20th century, the Pacific Northwest has experienced a warming climate and waterways. Current climate science indicates increased warming trends across the region, by as much as 3.2 degrees by 2040.¹⁰ The foremost impact of a warming climate will be the reduction of regional snowpack, which presently supplies water for ecosystems and human

⁷ Ross, Alexander. *Personal Manuscript*. Oregon History Project, 1811. eBook.

<http://www.ohs.org/education/oregonhistory/historical_records/dspDocument.cfm?doc_ID=F21C083A-B402-AD84-FD7EBE813C5BC485>.

⁸ Miranda Miroso, Rob Lawson, (2012) "Revealing the lifestyles of local food consumers", *British Food Journal*, Vol. 114 Iss: 6, pp.816 - 825

⁹ *Ibid*.

¹⁰ Mote, P.W., E.A. Parson, A.F. Hamlet, W.S. Keeton, D. Lettenmaier, N. Mantua, E.L. Miles, D.W. Peterson, D.L. Peterson, R. Slaughter, and A.K. Snover. 2003. Preparing for climate change: The water, salmon, and forests of the Pacific Northwest. *Climatic Change* 61: 45-88

uses during the dry summers. Climate change also results in the warming and acidification of the ocean. The impact of climate change has the potential to greatly decrease the stock and availability of seafood resources, especially salmon. With a reduction in available seafood resources it will become increasingly important for Tribal fishermen to maintain and use their treaty rights for 50% of the wild seafood harvests in the Pacific Northwest. The 50% right and the reduction in seafood availability could provide Tribes with a greater power and market share of the seafood industry in the Pacific Northwest.

Chapter 3 - Methodology

Interviews

Tribal Leaders, consumers within Indian Country, and Tribal seafood processors were contacted for the purpose of this feasibility report. Individuals within all groups were each invited to participate in a one-on-one interview in person, via phone, or email. Completion of these interviews took approximately 1 hour per interviewee. Interviewees included: casino managers, casino head chefs, Tribal leaders, Tribal government department heads, Tribal program managers, Tribal business managers and purchasing officers. Each group interviewed had a separate interview questionnaire and set of interview questions. The interview questions are presented in Appendix A.

Interviews were scribed in person, during the interview (consent received by interviewee verbally in person) from all the stakeholders. Careful notes were also taken during the interviews. Tribes and Tribal members and employees were not identified by name. Additionally, every effort was made to maintain the anonymity of subjects and individual Tribes through all published material. Text refers to the respondents by a general descriptor that protects their identities. Such descriptors, for example, include: "staff member of the elders program," or "casino manger," or "Tribal member."

1. Tribal Leaders

In order to respect Tribal governments and culture, Tribal leadership was contacted from 15 Tribes in order to make contacts into the Tribes. Tribal Leadership was asked about their perspectives on the Buy Indian Program, including barriers and opportunities. Tribal Leaders were identified from the ATNI Board of Directors and from the ATNI-EDC Committee Chairs.

2. Tribal Consumers

After making initial contacts into the Tribes and Tribal businesses, the next step of the process involved surveying potential consumers within Indian Country who would be willing to participate in the Buy Indian Program. Ten consumers were contacted. The intended consumer surveys were directed towards the following: casinos, elder and school programs, and other. The potential consumers were surveyed about the following: product(s) desired, products other than seafood, product specifications, current and future poundage desired, and storage capacity. Although, the main emphasis was placed on Salmon and other seafood products, potential non-seafood Tribal product lines from other Tribes that deal in produce and other meats were also discussed. Understanding of potential expansion can be used to strengthen and expand the program later. Storage capacity is important because it may provide opportunities to close gaps in distribution and supply chain issues.

3. Tribal Seafood Processors

The next step was to interview and/or survey all the Tribal Seafood Processors across the Northwest. Five Tribal seafood processors were contacted. The purpose of the surveys was to gather information on current and future processing capacity, distribution methods, storage capacity, transportation capability, equipment needs and gaps, how they buy, fisherman needs, marketing strategies, and current costumers. The aggregation of the above set of data will help ATNI understand supply chain gaps and needs, in addition to the strengths and opportunities each processor may be able to provide to the project.

Chapter 4 - Findings

The following section delves into the results from several Interviews conducted over the course of several months. The interviews revealed a series of barriers and obstacles the Buy Indian Program would face at multiple levels of the Program. At the Tribal leadership level cooperation and favorable policy were found lacking. Tribal Consumers presented a cautious willingness to participate based off price, quality, and guaranteed deliveries. Tribal seafood processors revealed unwilling cooperation and desire to maintain the status quo. Finally, Tribal fishermen showed the most need and support for furthering the Buy Indian Program through need to build capacity. As mentioned in the methodology section, Tribal leaders, businesses, seafood processors, and fishermen were interviewed in order to determine the feasibility of the Buy Indian Program within Indian Country.

Tribal Leaders

In order to establish initial contacts in the selected Tribes, several interviews were conducted with Tribal Leaders. Although 15 Tribal Leaders were contacted, only 8 were able or willing to be interviewed. In addition to providing contact information for select employees within Tribal departments and businesses, Tribal Leaders were asked to relay their feelings and opinions about the Buy Indian Salmon Program. The results of these interviews are summarized below covering identified opportunities and obstacles of the Buy Indian Program and working with the Tribes.

Opportunities

The Tribal Leaders were asked to identify the potential opportunities and benefits of the program. All of the Tribal Leaders asked concluded that the program would be a great benefit to all the Tribes across the Pacific Northwest. One theme common across the interviews was the opportunity rebuild the old trade networks that use to exist across the Pacific Northwest centering around Celilo Falls. Often times, the Tribes face old rivalries and competition between Tribes that are not apparent to the public, which can hinder cooperation between the Tribes. Tribal leaders see the Buy Indian Program as an opportunity to bridge these divides and work towards a more unified Indian Country.

Another identified opportunity is the continuing development of economic opportunities and Indian enterprises within and across Indian Country. In essence, that is the main purpose of the Buy Indian Program and to a larger extent the purpose of ATNI's Economic Development Corporation. Finally, many Tribal leaders believe the Program is another opportunity to leverage Tribal Sovereignty. Tribal Sovereignty, allows the Tribes to expand economic opportunities and offer incentives not otherwise available on non-Tribal lands. The above opportunities illustrate a deep understanding of Tribal Leadership and the benefits of the Buy Indian Program. Although many opportunities for building a stronger Indian Country exist, the program faces many obstacles as well.

Obstacles

Tribal Leaders were asked to identify potential barriers and obstacles of the program. Each of the Leaders identified a number of issues within the program, ATNI, and individual Tribes. The obstacles also include observations made during the course of interviews with Tribal Leaders. The obstacles and barriers are summarized below for each identified area.

Buy Indian Program

The Buy Indian Program was identified by Tribal Leaders as having no established business and/or marketing plan. The lack of a plan makes the Program more difficult to promote across the Tribes and potential partnerships. Although, the Buy Indian Program under the EDC's direction has a clear vision and potential for what the Program can and should be, Tribal leadership illustrates a different understanding of the Program. Through the interviews, it was apparent that Tribal Leaders had varying opinions on what the vision, goals, and objectives the Buy Indian Program should be. A few Tribal Leaders identified it as being as expansive as possible reaching into national and international markets. Other Leaders viewed the Program as being a program for Indian Country only in Indian Country. Much like the lack of business/marketing plan, a lack of clear vision for the Program from ATNI Tribal Leadership indicates a program that will be difficult to promote and gain agreement on amongst member Tribes.

ATNI and the EDC

The Tribal Leadership identified a few potential barriers and obstacles for the Buy Indian Program within ATNI and the EDC. The major obstacle identified was the staffing at the EDC, which consists of one full-time paid staff, the Executive Director. The EDC is thus frequently over-worked in accomplishing multiple economic development projects under its purview. In addition, funding sources are limited currently and may not pick up for several more years. Limited funding means a barrier on the ability of the EDC to execute and develop projects and programs.

Other Issues

The following is a summary of other issues identified by Tribal Leadership:

- Some Tribes unwilling to participate in program conversations and interviews
- Seafood processors operating at peak demand with established customers, and thus not willing to participate in program
- Tribal leadership willing to participate in program, however Tribal businesses are not willing or are wary of the program
- Tribes do not have seafood processors or capacity
- Tribes do not produce a product or commodity that could be shipped to other Tribes
- Disconnect between Tribal leadership and government and Tribal members, especially fishermen
- Tribal sovereignty and enforceability of program within each Tribe
- Lack of access to capital to grow seafood industries within the Tribes at all levels
- Few to no Buy Indian Policies within Tribal government and/or businesses
- Need federally approved Tribal foods regulations and certification processes
- Need fishermen's coop or similar organization

The obstacles and barriers identified by Tribal Leadership and interview observations illustrate how establishing the Buy Indian Salmon Program will face major obstacles that could prevent the program from even being feasible across Indian Country. The biggest issues identified by Tribal Leadership and through interview observations centers around communication. The Buy Indian Program lacks an agreed upon vision and goals. ATNI board members did not or were not willing to participate in interviews for this report. Tribal Leadership are on board with the program, but Tribal businesses are not

willing to participate. Communication throughout the development and potential success of the Buy Indian Program will present multiple barriers.

Tribal Consumers

In an effort to understand the demand for Tribal seafood products with potential Tribal consumers, Tribal businesses were interviewed. The interviews focused on Casinos and their Food & Beverage Directors.

Initially, Tribal departments and programs were going to be contacted for potential seafood demand with the Tribal community. In interviews with Tribal Leadership it was discovered that, in Oregon, the Oregon Department of Fish and Wildlife has agreements with the Tribes that ODFW will provide free fish, big game, antlers, feathers, furs, and skins to Tribal Elder Programs and for Tribal ceremonies.¹¹ The agreement involves providing free big game licenses to Tribal members for ceremonial purposes, while other the items are provided and delivered directly to the Tribe sand various programs free of charge. The fact that Oregon Tribes receive these items from ODFW free of charge, severely limits the potential for consumers with Tribal government departments and programs.

Current Seafood Use

The Tribal Casinos are purchasing seafood and particularly Salmon from a variety of sources. Most casinos purchase their seafood from dominant seafood and general food providers, such as Pacific Seafood and Cisco. Within ATNI's *Indian Salmon Marketing Program*, a survey of 27 Tribal Casinos showed only two mentions of traditionally prepared or locally caught salmon.¹² A fair number of casinos currently purchase seafood coming from the Atlantic, including Atlantic salmon. Atlantic salmon can be obtained more cheaply than Pacific salmon, even with the casinos already located in Pacific Northwest.

Where buffets can be found, Atlantic salmon, Sockeye, and Keta are the main salmon featured. For white-table cloth service the casinos rely on Coho and/or Chinook, some use Atlantic salmon at their restaurants as well.

In addition to salmon products, many of the casinos also feature various other fish and a variety of shellfish products. The other seafood products include, but are not limited to: crab, shrimp, lobster, halibut, tilapia, ahi, oysters, clams, cod, etc. Items such as crab, shrimp, and cod are used year round both at buffets and restaurants. Other seafood items are featured year round by some casinos but not others. Many casinos will order other seafood products for special events or based on seasonality of the product.

Quality of Product

The quality and freshness of seafood products are very important to the casinos, especially if the casino has white-table cloth service. In the past, casinos have acknowledged trouble with the quality of Tribal salmon. The issues of quality include: quality of handling practices by fishing gear type, handling practices within processing operations, transportation standards, and packaging standards. The quality and handling of Tribal salmon products was noted as an issue in the 2010 Salmon Marketing Program

¹¹ Oregon Department of Fish and Wildlife, (2011). *ODFW and Tribal Partnerships in 2011*. Salem, Oregon.

¹² Affiliated Tribes of Northwest Indians, "Salmon Marketing Program." Accessed May 11, 2013. <http://www.atnitribes.org/salmon-marketing-program>.

report produced for ATNI.¹³ The casinos pride themselves on the quality and freshness of the food found at their restaurants and buffets.

Price of Product

One of the major sticking points for the casinos was the price of the products being offered. Price is of particular importance if casinos feature salmon on their buffet. When asked whether or not the casino would be willing to purchase Tribal seafood at a premium in order to support other Tribes and Tribal fishermen, the answer was a resounding “no.”

Other Tribally Produced Products

When asked whether or not Casinos would be willing to purchase and/or feature other tribally produced products, whether food or other items, the casinos indicated that it was a possibility. Other Tribal products include but are not limited to: bison and cattle meat, fruit and vegetable production, tribal artwork, and other tribally made products. Whether or not the casino was willing to carry a product was dependent on several factors. Factors included: the nature of the product, approval from casino management, reliability of supply, and price. A few casinos indicated an interest in buffalo meat; however, other casinos indicated that the food service at the casino had no need or desire of buffalo products.

Storage Capacity

Tribal business indicated additional storage capacity was available or could be made available if need be. Storage capacity included options for cold, cool, and dry storage. No business indicated any desire or need to increase current storage capacity at the given time.

Tribal Seafood Processors

In order to establish and continue a successful Buy Indian Program, products must be available. Tribal seafood processors will be one of the most important stakeholders in Buy Indian Program. Processors were interviewed to better understand products available, seasonal availability, pricing, storage and distribution, and barriers to the program.

Availability and Type of Products

The interviews revealed that virtually any Pacific Northwest seafood and can be obtained within Indian Country. The availability of seafood cuts, quality, grades, processing, and packaging is also limitless. The major issue around products is that certain processors do not have the capacity to process or package certain types of seafood or process the seafood into certain products. Every seafood and processing capacity is covered in Indian Country; however, different processors can handle different things.

Seafood processors do utilize other processors to package and/or process products that they themselves are not capable of doing, and then sell the product under their own label. However, the other processors tend to be non-Tribal processors. Tribal processors expressed willingness to ship

¹³ *Ibid.*

and/or receive seafood to process with other Tribal processors. The issue lies within the geographic distance between many of the Tribal processors. The main problem would be Tribal fishermen and/or seafood processors getting a fresh product from boat to processing, without pre-preparation and/or flash-freezing. It makes more sense to the Tribal processors to keep relationships with current non-Tribal processors that are located closer and which makes more financial sense.

Production Capacity

There is a great deal of unused Tribal seafood processing capacity. There are seasonal crunches. The larger Tribal plants were built when processing was almost entirely local. As such they are sized to peak seasonal local runs, meaning processors reach maximum capacity during local seasonal runs. The longest local runs are going to be less than a calendar quarter. The spring and summer runs are usually more time constrained or shorter in duration. The consequence is that no plants run at capacity for more than three of four months of the year. Processors complete some maintenance, but mostly they are idle the rest of the year.

Storage

Storage of products can be a vital aspect of any business, especially an industry that involves such large quantities of product. The larger tribally-owned processors are capable of keeping product for consumers year round and shipping products to the consumer as needed, which is important to consumers who cannot store large quantities of product year round, but will still sell the product year round.

The smaller independent tribal member-owned processors have limited and temporary storage capacity, usually for when processing of products is taking place. Otherwise, the smaller processors do not have the capacity to store product for consumers for any great length of time. Neither the independent nor the tribally-owned processors have outside storage capacity or a desire to currently expand capacity.

Distribution

No matter the size of the seafood processor, whether tribally-owned or independently-owned, each is capable of shipping and/or transporting their given products to customers across the region. Tribal seafood processors ship their products within Indian Country, throughout the Pacific Northwest, and in limited quantities across the entire United States. Distribution methods include, but are not limited to:

- Refrigerated trucks and trailers of varying size
- Air freight
- Pick-up trucks and personal vehicles
- Shipping companies (Fedex, UPS, etc.)

The major issue to establishing distribution to and from seafood processors within the Indian Country of the Pacific Northwest is the geographically dispersed nature of Tribal Reservations and businesses. However, if the program is to include national and international markets, outside of Indian Country, distribution would become less of a problem. Larger markets would indicate, larger shipments of product which would reduce transportation costs and make distribution more feasible.

Almost all the Tribal seafood processors are located within Washington, and more specifically Northwest Washington and Puget Sound Area. Shipping fresh seafood across the Pacific Northwest will be difficult. However, processors flash-freeze, smoke and can products which do not require immediate shipping or as reliable distribution networks. The major issue in distribution is the ability to get “fresh off the boat” fish from the processors to more geographically dispersed locations in a reasonable time without further processing. Shipping and distribution will also be heavily reliant on non-Tribal companies. The absence of Tribal trucking presents an opportunity for establishing Tribal trucking within a Tribe or across Tribes, in addition to the Buy Indian Program.

Other Barriers

One of the most difficult barriers to implementing the Buy Indian Program with the cooperation of seafood processors is the willingness of the Tribal seafood processors to participate. A few processors declined to participate in the interview process of this study. Several of the seafood processors believe that their current business model and consumer base are producing a profit and healthy business model. The processors do not want to venture into uncertain territory when their current model is working for their business and for the Tribe. When asked whether or not the processor would be willing to sell exclusively to other Tribes and Tribal business, most expressed unwillingness to drop consumers and customers that they have built a great working with relationship with.

In addition to unwillingness to participate in new ventures, there are beliefs amongst many of the processors that their products and seafood are superior to other processors and Tribe’s seafood. The belief in a superior product creates aversion to aggregating multiple Tribes’ products. The processors fear the other’s inferior product and thus the quality of their product and brand name will decline with the aggregation of products.

Finally, there is a disconnect between Tribal leaders and Tribally-owned processors. While Tribal leaders express a desire to promote and adopt the Buy Indian Program, several Tribal seafood processors seem unwilling and/or leery of the possibility of this new venture.

Tribal Fishermen

At the base of the entire seafood industry, including the Tribal seafood harvests are the Tribal fishermen themselves. The Tribes and Tribal fishermen have been fishing the waterways of the Pacific Northwest for time immemorial. Even with ancestral fishing knowledge and the treaty rights to harvest 50% of wild seafood in the Pacific Northwest, the Tribal fishermen face many challenges and barriers to maintaining business and healthy incomes. Tribal fishermen from multiple Tribes were interviewed to understand these challenges and barriers.

Seasonality and Catch

The number one issue and barrier facing all Tribal fishermen is the seasonality of fishing and availability of catch during a given season. The amount of catch any fishermen brings in depends on a multitude of factors including:

- Length of season opening
- Catch Limits

- Number of fishermen in the season
- Weather conditions
- Returns to spawning grounds
- Habitat restoration and conservation
- Ocean conditions
- Climate change
- Natural hazards impacts

With so many factors affecting how much catch any individual Tribal fishermen take in, it is exceedingly difficult to predict or guarantee any season or fishermen will have a successful year and decent income.

Business Training

One of the biggest issues identified by Tribal fisherman was their own lack of formal business training. Although most Tribal fishermen sell their catch to seafood processors, both Tribal and non-Tribal, others prefer to process and sell their own catch to consumers and the general public. Unfortunately, most of the Tribal fishermen do not have training in creating business plans, basic business structure, and/or marketing techniques. The lack of business training translates to poor sale of products, lower prices, limited access to capital, and missed markets for sale of product.

Access to Capital

The fishing and seafood industry requires specialized equipment, training, and trained personnel which does not come cheap. In order to upgrade and/or purchase new equipment usually requires a significant expenditure and investment on the part of the Tribal fisherman. One Tribal fisherman indicated that any time equipment breaks down or needs to be upgraded it can cost between \$5,000 to \$10,000 dollars at time. Equipment needs include: engine repair, new nets and net repair, net hauling, and ice machines. Expenditures in these amounts can be a heavy burden for fishermen bringing in minimal income each year from seasonal catches.

Tribal fishermen require frequent access to capital and often times face many barriers to capital. The barriers include, but are not limited to:

- Non-Tribal financial institutions blacklisting individuals and companies with addresses on Tribal Reservations
- Use of personal credit cards to cover business expenses
- Tribal government and economic development corporation micro-loans, which are usually no more than \$5,000 and are limited in number
- Lack of formal business training

Mistrust

With 57 Tribes represented by ATNI throughout the Pacific Northwest, it is easy to imagine that all of the Tribes have a fisheries department within their government and have at least a few Tribal fishermen. The Tribes have existed in the Pacific Northwest region for thousands of years and certain conflicts have developed and arisen over the millennia. Some inter-Tribal conflicts have continued to the

modern day and can become more pronounced on the individual and/or family levels when Tribes and Tribal fishermen are competing for the same resources.

A number of accusations of mismanagement of fisheries, deceitful fishing practices, and unfair advantageous float around Indian Country and between Tribal fishermen. A review of Tribal seafood processing websites revealed one Tribal fisherman accusing another Tribe of fishing the waters of Columbia when several Tribes had agreed to not fish in a given year due to low spawning numbers that year.¹⁴ With such ingrained mistrust between Tribes and Tribal fishermen it can be hard to imagine how the Buy Indian Program will proceed with any ease.

Opportunity

The above risks are true equally of non-tribal fishers which creates an unrecognized advantage for Tribal fishers. With approximately 1/4 the number of fishers (in Washington) the individual opportunity for the same number of fish is obviously four times greater than among their state licensed counterparts. This is a huge advantage relative to their competitors and gives them a safety margin relative to the barriers.

¹⁴ The website and Tribes involved are not listed to protect from further conflict.

Chapter 5 - Recommendations

The recommendations for the Buy Indian Program were developed from the findings and results of the multiple interviews conducted with Tribal Leadership, businesses, consumers, and fishermen. The recommendations follow with top-down then bottom-up approaches. Each recommendation section and sub-sections are placed in order of perceived importance.

Note: Recommendations do not reflect the needs or desires of any one Tribe, business, or consumer. The recommendations are a reflection of the researcher's observations through conducting interviews and attending ATNI conferences. The recommendations are meant to illustrate potential opportunities ATNI and member Tribes can employ to work closer together to achieve success in the Buy Indian Program.

Top-Down and Bottom-Up Approach

The interviews conducted to determine the feasibility of the Buy Indian Salmon Program revealed several barriers to the program in its current form. The identified barriers will be difficult to overcome in the near future. In its current form the Buy Indian Program may not be able to proceed further. However, there are multiple strategies and actions the Affiliated Tribes of Northwest Tribes and member Tribes can consider to strengthen the capacity of Tribes, businesses, and fishermen in support of economic development within the seafood industry of the Tribes.

As a result of the findings and results of multiple interviews and observations, two approaches for the Buy Indian Program are recommended. ATNI should consider pursuing top-down and bottom-up approaches within and across Tribes to promote the development of the Tribal seafood industry. Top-down approaches would involve working with all member Tribes, and their governing body, and developing policies. Bottom-up approaches would consider the capacity of individual Tribal fishermen of the roughly 200 Tribal fishermen found throughout the Pacific Northwest.

I. Top-Down Approaches

Top down approaches are meant to reflect recommendations that can be accomplished at the Tribal government, Tribal business corporations, and/or ATNI boards and working groups level. The focus of the top down approach is on the development of policies and inter-Tribal communication.

1.1. ATNI and the EDC

As the lead and guiding organization for the Buy Indian Program, ATNI and the EDC have their own set of opportunities the organization can pursue in order to bolster and further the Program within Indian Country.

1.1.1. Facilitate a visioning process for the Buy Indian Program

One of the most important findings from the interviews was a clear lack of purpose and vision for the Buy Indian Program through ATNI. ATNI board members did not have a common consensus on the very nature of the Buy Indian Program. Some Tribal leaders

expressed the view that the Program involved Tribes buying products from other Tribes and keeping the value of Tribally-produced products within Indian Country. Other leaders believe the Program should expand into other markets, both Tribal and non-Tribal, including internationally. Although, the EDC has a clearly defined vision and identified potential for the Program, Tribal leadership needs to be on the same page. The Buy Indian Program is an economic development tool for the Tribes and Tribal members not for the benefit of ATNI and the EDC. If Tribes are unwilling to pay a premium, then the program needs to seek out markets that will. With a lack of clear purpose and vision of the Program it may make it difficult to fully pursue a Buy Indian Program in any form.

ATNI, the EDC, and member Tribes should consider undergoing a vision process. A clear vision, with set goals and objectives will help ATNI market the Program across the Tribes, and outside the Tribes if the direction of the Program leads it there. The process could also include the development of a business plan and/or marketing strategy ATNI and member Tribes could pursue.

1.1.2. Develop relationships across Indian Country which further develop and support the Buy Indian Program

Another opportunity for ATNI, and possibly the best way to continue the development of the Buy Indian Program, is through building relationships and business opportunities between Tribes, Tribal businesses, non-Tribal businesses and Inter-Tribal organizations. As a Buy Indian Program whereby products stay in Indian Country and through inter-Tribal cooperation seems slim to unlikely as it currently stands, ANTI can still develop relationships, connections, and business opportunities to keep the Program alive. One possibility exists in which ATNI obtains a handful of Tribes to participate in a pilot. If the pilot proves to be successful more Tribes may be willing to join as the potential benefits become more apparent.

1.1.3. Continue to develop opportunities and connections, which build and expand the Buy Indian Program

Since the Program's inception in 2010, the Program has been developed through the EDC identifying business connections between potential consumers and Tribal seafood processors. The EDC has also been able to obtain various grants to help build capacity for Tribal fishermen and seafood processors. The grants have been used to purchase equipment such as ice machines and small refrigerated trucks for transportation. During the 2012 to 2013, the EDC has been able to develop business connections between one Tribal seafood processor in Washington and several other businesses, including one Tribal casino in Oregon. The previous connection illustrates how small connections across the region can begin to build the Buy Indian Program one step at a time. Unfortunately, unless more Tribes and Tribal businesses can begin to work closer together, and not always as competitors, small connections may be the only way to build the Program. As new connections develop and more and more Tribes and Tribal businesses can see that the Program is working, more stakeholders may begin to come to the table to develop and share in the potential wealth of the Buy Indian Program.

1.1.4. Work with the Tribal fish commissions to take advantage of the opportunities already developed at ATNI, the EDC, and the fish commissions

Another important connection to maintain and build upon is ATNI's relationship with the two inter-Tribal fish commissions in the Pacific Northwest, the Northwest Indian Fisheries Commission (Washington) and the Columbia River Inter-Tribal Fish Commission (Columbia River Basin region). Each fisheries commission already has identified issues and challenges for Tribal fishermen in the region and has multiple programs to help Tribal fishermen. The fish commissions provide training in fish handling, business development, and marketing. ATNI and the EDC could try to develop relationships with the fish commissions and integrate efforts across ATNI and the fish commissions to help build the capacity of Tribal fishermen across Indian Country.

1.1.5. Conduct a feasibility assessment of developing centralized distribution network

The distribution of seafood products across Indian Country within the Pacific Northwest was identified as a major barrier to the Program. ATNI should consider the development of a few distribution centers, where Tribal seafood processors from across Indian Country can consider transporting products to in order to move the product across Indian Country in an established distribution network. Anywhere between two to four distribution centers should be considered in order to reach the geographically dispersed Tribes. The prime locations to establish centers would include: Seattle and Spokane, Washington and Portland and Pendleton, Oregon. ATNI could either help establish the distribution network and hand ownership over to a Tribe or Tribal member entrepreneur, or maintain management for a small percentage of the profit to continue operations.

Although, a series of distribution centers and a network would help to deal with the geographically dispersed nature of the Tribes, it may be an indication that the Program would create a greater price for Tribal seafood products. Simple transportation analysis reveals that the average distance between the Tribes in Oregon alone is over 200 miles between nine tribes.¹⁵ Even with a well-established distribution network across the Tribes that is a huge amount of vehicle miles traveled. With cost of shipping increasing in conjunction with the increase in fuel prices, distribution across Indian Country may be financially unviable.

1.2. Develop, use, and enforce "Buy Indian" policies within Tribal governments and businesses

In order for the Buy Indian Program to work within Indian Country policies should be adopted by individual Tribal governments and business corporations that support the purchase of Indian products from their own Tribes and from other Tribes. Some Tribes do have policies and regulations that give preference to Indian-owned businesses and contracts, although not all Tribes have these policies. The policies frequently lack any enforceability as they are preferences only and not policies requiring contracting and/or purchasing be given to Tribal businesses.

Tribes could adopt policies that require a certain percentage of goods and/or services purchased for Tribally-owned business from available products that can be found in Indian country. ATNI could consider forming a committee and/or working group to guide the adoption and implementation of such policies within Indian Country and ATNI member Tribes. The federal government has adopted similar policies within their Small

¹⁵ Calculations were conducted by taking the average distance between each Tribe and finding the average distance overall.

Business Administration's (SBA) 8(a) certification¹⁶ process and even for Department of Defense (DoD) contracts. DoD contractors are frequently required to give a certain percentage of subcontracts to Indian-owned businesses where available.¹⁷ If the federal government and DoD can adopt Buy Indian policies, certainly the Tribes can also adopt policies to support fellow Tribes within the Pacific Northwest.

2. Bottom-Up Approaches

In order for any Buy Indian Program to be considered in the future, the very beginning of the seafood chain should be a major focus. The economic start of the Tribal seafood industry is of course the Tribal fishermen. Tribal fishermen have been the stewards of the fish and waterways in the Pacific Northwest for time immemorial. Without the fishermen there is no tribally caught and harvested fish. Tribal fishing rights in the Pacific Northwest extend not just too Tribal governments, but all the way down to Tribal families and individual fishermen. It is for this reason, that ATNI should consider focusing their main efforts towards building the capacity of Tribal fishermen across Indian Country and strengthening the economic value of tribally caught seafood. Capacity building will include: business training, access to capital, processing, and access to markets.

2.1. Connect and pursue outreach strategies that connect geographically dispersed Tribal Fishermen

There are approximately two hundred Indian fishers in the Pacific Northwest, based on the number of boats. The number is much higher in terms of individuals involved because each boat has more than one crew member and others do bank fishing. The bank fishers harvest relatively unimportant numbers of fish. Reaching 200 independent fishers is a challenge; however, if ATNI can reach out to the boat captains, the decision makers, ATNI and the EDC can thus relay any meaningful information to his crew. An additional challenge involves that fact that most Tribal fishermen are not completely supported by fishing most have off season jobs which are often their primary occupation. All have barriers in getting to meetings either because of these jobs or simply due to the cost of participating, thus reaching out to the single boat Captains is even more important.

ATNI and the EDC could consider a communication strategy to develop relationships with Tribal boat captains. Through developing relationships, as indicated in the top-down approaches, ATNI could work with Tribal governments and the Inter-Tribal Fish Commissions. Through interviews, surveys, working groups, and/or a town hall style meeting, ATNI could communicate the Buy Indian Program, its efforts and potential. While at the same time, the Tribal fishermen could communicate capacity needs, barriers and obstacles, and opportunities to connecting with other Tribal fishermen, Tribal businesses, Tribal governments, and develop strategies to connect into the Buy Indian Program.

¹⁶ U.S. Small Business Administration, "8(a) Business Development Program." Accessed June 4, 2013. <http://www.sba.gov/category/navigation-structure/contracting/contracting-support-small-businesses/8a-business-developme>.

¹⁷ Department of Defense, Office of Acquisition. (n.d.). *Subpart 19.7—the small business subcontracting program*. Retrieved from website: [https://acquisition.gov/far/html/Subpart 19_7.html](https://acquisition.gov/far/html/Subpart%2019_7.html)

2.2. Build the capacity of Tribal seafood processors to operate throughout the year

As identified in the interviews, there is a great deal of unused Tribal processing capacity. The consequence is that no plants run at capacity for more than three of four months of the year. Given that the arrival of fish is staggered around the coast and rivers, there is opportunity to use that idle capacity. Making the connections gives fishers a choice. That choice gives them a little bit of price leverage. The situation has created a condition whereby the current buyers of seafood catch have organized a local monopoly structure and in doing so will not appreciate the Buy Indian Program. Making distribution connections between the under-utilized Tribal processors and Tribal Fishermen during the Processor's offseason will be very important.

2.3. Conduct and/or connect Tribal fishermen to business training opportunities

One of the major issues identified by Tribal fishermen was lack of formal business training and education. Business training helps fishermen develop business plans, marketing strategies, and gain access to capital. ANTI should consider developing business training programs or working closely with Tribal government, community colleges, and small business centers in order to connect Tribal fishermen to business training opportunities. As most Tribal fishermen lack business training and access to capital, ATNI should consider programs that are free or subsidized by another program in order to provide financially disadvantaged fishermen with free education opportunities. Business training will, more importantly, allow Tribal fishermen to develop their own businesses in a manner that is most beneficial and important to each Tribal fishermen and fishing family. If Tribal fishermen are more business savvy, they may potentially develop the insight that in order to access bigger markets, there is advantage in working together.

2.4. Connect Tribal fishermen and processors to local, regional, and international markets

In order to develop the Buy Indian Program, whether in Indian Country or across a broader region, ANTI will need to help Tribal fishermen and seafood processors gain access to various markets. As mentioned earlier, the EDC has already begun making connections and developing business connections as opportunities arise across Indian Country. Even if, ATNI pursues making small connections one step at a time to promote the Buy Indian Program, determining appropriate markets and seeking out new connections will be vital to the further establishment and success of the Program.

2.4.1. Develop Tribal business's access to local markets

As much of the report has shown, developing the Buy Indian Program, solely within Indian Country, may be next to impossible unless major cooperation begins to take place within the Tribes. However, the report also illustrates how some Tribal businesses have managed to integrate themselves into local and community economies where Tribes and Tribal businesses can be found. Although the Buy Indian Program, for the purposes of this report, is targeted at keeping the value and profit of Indian products in Indian Country, it may be more harmful and less beneficial to keep the value solely in Indian Country.

In many locations, across the United States, Tribes are viewed with various levels of skepticism and even racism. If Tribes isolate themselves from local markets, which can

mean not selling products to local consumers and not buy products from local producers, then certain notions will only continue to fester and persist within given communities. The intent of the Program should not be to promote one economy over another, which can have potentially harmful effects for all those stakeholders involve.

It is for these reasons that ATNI and the EDC may want to consider building the capacity and marketing of Tribal fishermen and seafood processors in order to pursue local markets in the communities they already live in. In combination with many of the other recommendations made in this section of the report, inserting the Tribes into local markets can help reduce costs across the board and promote the Tribal brand and name within a community. "Buy Local" programs have the potential to reduce the costs any number of business costs, including: shipping and distribution, production, and scale of marketing. In local markets, Tribal fishermen would be able to gain higher profits for their products and with lower costs to them; they would also be able to obtain more of the profits. For Tribal businesses, "Buy Local" programs keeps profit and value of items in the community and helps promote the image of the Tribe, especially for the Tribal Casinos.

2.5. Consider developing the capacity of Tribal Fishermen to process their own catch for sale

Tribal fishermen face many obstacles in their ability to process or access processing capacity. The factors include: geographic location, short season openings, limited catches, fishing techniques, equipment, and ancestral fishing rights and locations. In addition, there is limited processing capacity amongst many Tribes. A few Tribes have seafood processors, and there are a handful of tribal-membered owned small, independent processors. Still, many fishermen have minimal to no access to seafood processing capacity. Many of the complaints coming from consumers of Tribally-harvested fish are about the quality and freshness of the products.

Not only do many Tribal fishermen lack access to seafood processing capacity, but also are forced to sell their products at reduced market prices to non-Tribal Seafood processors. Reduced price points cause a major detriment to Tribal fishermen making it difficult to live off the minimal wages they receive from their individual catches. A better option for the fishermen might be to package their catch themselves and sell the products over the internet or within local markets. One solution to allow Tribal fisherman access to processing capacity is to introduce mobile canneries and flash freezing units. Each is discussed in more detail below.

2.5.1. Conduct a feasibility study for pursuing mobile canneries

Mobile meat canneries have existed in the United States since the early 1930s, when the canneries were used to process large quantities of meat in a short-period of time, in order to provide food to hungry populations over the long-term.¹⁸ The canneries allowed meat to be persevered indefinitely and saved large meat supplies from rotting and going to waste.

In modern times, groups such as the Mennonite Central Committee¹⁹, still have use mobile canneries for this purpose. Small businesses have started to spring up across the U.S.

¹⁸ Mennonite Central Committee, "History of MCC." Accessed May 15, 2013. <http://www.mcc.org/about/history>.

¹⁹ Mennonite Central Committee, "Welcome." Accessed May 15, 2013. <http://www.mcc.org/about/history>.

offering meat processing and canning services at a reduced price to major meat processing plant. The mobile units are often brought to small scale ranching, herding, and/or hobby farm locations. The processing is often simple canning and/or minor processing and on a very small scale.

The processing involves bringing the mobile cannery unit, a large trailer hauled by a semi-truck, to a given location. The animals can be butchered on-site, or delivered in quarters. From there, the meat is processed into various cuts and/or canned. The mobile units are USDA certified, and if butchering is required, a certified butcher is also present. The meat can either be canned or vacuum sealed as forms of packaging.

Mobile cannery units could go to Tribal Reservations, or other designated areas near the fishing locations, during the given fishing seasons. Tribes would not have to spend much the needed capital for a seafood processing plant. A processing plant that might not prove profitable and would most likely not be capable of staying open year round due to the seasonal fish openings. The mobile units could provide temporary employment for a minimal number of Tribal members, as most units do not have a full-time staff but rely on volunteers and/or temporary production staff. Once products were canned and/or packaged, Tribal fishermen could keep the products and/or sell them to fellow Tribal members or in the local food system. Fisherman from a given Tribe could aggregate the product to brand under a single Tribal entity, and could easily affix their own labeling. Further research and study would need to be conducted to determine the feasibility of a mobile seafood cannery in Indian Country.

2.5.2. Conduct a feasibility study for pursuing mobile flash freezing

Mobile cannery units provide an option for quick and possibly affordable seafood processing. However, with seafood sometimes it is better to flash-freeze the seafood with minimal processing or as a whole fish. The concept of mobile flash-freezing units are relatively new and Green Mountain College in Vermont is currently developing a mobile unit to study the feasibility and potential benefits of such a unit. GMC just started the venture with a \$100,000 investment to start.²⁰

A mobile-flash freezing unit could follow the same seasonality, and could conceivably be moved with mobile seafood canneries. The units could provide an additional option for processing option for Tribal fishermen. Once flash-freezing has taken place seafood products could also be transported more easily and in a close to fresh product as conceivably possible.

2.6. Develop and support Tribal fishermen's access to capital

Fishing, whether Tribal or non-Tribal, involves expensive equipment and business capacity. Many Tribal fishermen rely on personal credit cards and small micro-loans from their Tribe to continue to operate their fishing operations. Often times the previously mentioned resources

²⁰ Green Mountain College Farm & Food Project, "Researching the Viability of Flash-Freezing Technologies for Enhancing Local Foods in the Institutional and Charitable Food Systems." Last modified June 2010. Accessed May 12, 2013. <http://www.greenmtn.edu/media/562564/ffu.pdf>.

are limited and Tribal fishermen find themselves unable to upgrade or purchase new and deeply needed equipment. ANTI should continue to pursue grants that help provide opportunities for Tribal fishermen and seafood processors to build and maintain basic capacity. ANTI and member Tribes may want to consider developing larger loan and grant funds that can be used to help build the capacity of Tribal fishermen and seafood processors.

Chapter 6 - Conclusion

The Buy Indian Program is an economic development strategy the Affiliated Tribes of Northwest Indians and ANTI's Economic Development Corporation have been working towards in order to build and retain the economic value of Tribal seafood products across Indian Country. The Program has great economic potential and cultural value within Indian Country, especially considering the Tribal share of the seafood market is roughly half of the regions share. The Program could help to strengthen Tribal fishermen, expand the business of Tribal seafood processors, increase the brand and quality of Tribal businesses, and develop lasting partnerships and bonds between Tribes. Unfortunately, the Buy Indian Program faces many barriers to becoming a successful Program.

The findings of this report based on interviews with multiple Tribal leaders, businesses, seafood processors, and fishermen reveal an Indian Country fraught with problems and barriers that make a Buy Indian Program unlikely as one unifying economic development program. Tribal leadership within the Tribes and ATNI do not share a common vision, goals, or objectives for the Program which makes progress difficult at best. Tribal businesses, especially casinos, are more focused on getting the best deal for the best price, which does not always align with cultural values expressed by Tribes and Tribal members. The price driven business value is usually guided by the directives of Tribal economic development corporations and closely enforced by Casino management. Tribal seafood processors have limited processing capacity and carry little of the market share for seafood products in the Pacific Northwest. Tribal fishermen face issues of business training, access to capital, and limited seasons and catch potential. Finally, mistrust and competition between Tribes and Tribal members abound.

Although the Buy Indian Program faces many barriers, the Program has been making small steps toward progress through various business connections and opportunities as they arise. In addition, a number of solutions are available to ATNI and member Tribes if further pursuit of the Buy Indian Program is desired within ATNI. Through a top-down approach ATNI can pursue Buy Indian policies at the Tribal government level. ATNI and the EDC can also consider a business plan and visioning process to develop common and agreed upon visions and goals that benefit all of Indian Country. Through bottom-up approaches ATNI can help strengthen the position of Tribal fishermen by building capacity, business training, and access to capital. As an intermediary between Tribes, ATNI and the EDC can continue to build small connections and opportunities, while considering efforts to provide a distribution network that can provide faster and reliable delivery of goods.

Even through the identified solutions, the Buy Indian Program may face too many barriers to developing into a healthy and beneficial program within Indian Country and the Pacific Northwest. The Tribes too often view themselves as competitors, which is not entirely untrue, and mistrust abounds at all levels of the Tribe. Mistrust exists between the Tribes, Tribal members and Tribal government, and with non-Tribal businesses and entities. The slow moving nature of Tribal business enterprises also places a significant obstacle on the Program. The Buy Indian Program may succeed one day in the future, but as this report indicates it the Program has a long ways to go before it can see success come to fruition.

Appendix A – Tribal Interview Questions

**ATNI Economic Development Corporation
Buy Indian Program, Salmon Project
Introduction Questionnaire**

Purpose

The purpose of the following short questionnaire is to gather information from ATNI Tribal Leaders about contacts to further cooperation and understanding about the Buy Indian Program spearheaded by ATNI. In addition we would like permission to conduct further research, surveys, and interviews with the Tribe's government and business departments.

Your Name: _____

Tribe: _____

Company/Department/Title : _____

Phone or E-mail: _____

Question 1: What businesses, government departments, and/or programs require and purchase Salmon and other seafood within your Tribe?

Question 2: Can you provide the names and contact information for individuals we can contact to gather more information from?

Name	Department	Phone or E-mail
_____	_____	_____
_____	_____	_____
_____	_____	_____

Question 3: Are you willing to meet with and facilitate meetings between Tribal purchasing managers, Tribal Seafood Processors, and ATNI Economic Development employees?

Yes___ No___

Question 3: Will your Tribe allow a disinterested third-party graduate student researcher from the University of Oregon to interview and survey various Tribal businesses and government departments to gather more information about the Buy Indian Program to further the intent of the Program?

Yes___ No___

Based on your understanding of the program what are your overall feelings about the program?

What do you believe are the greatest obstacles to achieving the program?

Are there any missed opportunities you know of that have not been identified in what you know of the program or that you yourself have identified?

**Affiliated Tribes of Northwest Indians
Buy Indian Program, Salmon Project
Consumer Questionnaire**

Introduction

Tribe:

Name of Casino(s):

Location(s):

Daily Visitors:

Daily Buffet Patrons:

Daily Restaurant(s) Patrons:

Species and Products

What species of salmon does the Casino feature? (List all)

What salmon products and cuts does the Casino sell?

What other seafood products does the Casino sell? (List all)

Does the Casino have a buffet?

If so, what salmon products does the Casino feature?

What salmon cuts does the buffet feature?

What other seafood products does the buffet feature?

Does the Casino have white table cloth service?

If so, what salmon species do the restaurant(s) feature?

What salmon cuts do the restaurant(s) feature?

What other seafood products does the restaurant(s) feature?

Price and Quality

What is the average price points for each of the Salmon products featured?

What are the grades of Salmon quality featured at the Casino?

Would the Casino be willing to pay more of premium for Native salmon products from the Pacific Northwest?

Is price or quality more important for the buffet? (For price list average price point, for quality list grade)

Is price or quality more important for white table cloth service? (For price list average price point, for quality list grade)

Shipping and Storage

How many pounds of each species does the Casino require every week?

How often do you receive shipments of salmon to the Casino?

Does the Casino have additional storage capacity to hold more products beyond what the Casino requires?

- Cold:
- Freezer:
- Dry:

If yes, how much additional storage capacity does the Casino have? (If the Casino can store totes, how many? Otherwise, list storage capacity in pounds)

- Cold:
- Freezer:
- Dry:

Are there plans to expand the current storage capacity?

If yes, how much additional storage would be available for additional salmon products?

Special Events

Does the Casino feature special events throughout the year that may require additional Salmon products beyond the normal weekly shipments?

List the events and dates:

What type of additional salmon products will be required per event?

Other Species and Products

Does the casino feature any other seafood products? (List them)

Are any seafood products featured in the Casino from the outside the Pacific Northwest (i.e., the Atlantic, Chile, Asia, etc.)? (List them)

Are any seafood products featured in the Casino from Alaska? (List them)

Would the Casino be interested in other Native products to feature in the Casino?

ATNI Program

Based on your understanding of the program what are your overall feelings about the program?

What do you believe are the greatest obstacles to achieving the program?

Are there any missed opportunities you know of that have not been identified in what you know of the program or that you yourself have identified?

Any additional comments?

**Affiliated Tribes of Northwest Indians
Buy Indian Program, Salmon Project
Questionnaire – Tribal Seafood Processors**

Introduction

Tribe:

Company:

Location(s):

Is the company tribally-owned or privately-owned by Tribal member?

If tribally-owned who does the company report to?

Species and Products

What species of salmon does the company process?

What salmon products and cuts does the company produce?

What other species of seafood does the company process?

What other products, other than salmon, does the company produce?

Does the company sell product to its own Tribe's companies, casino, and/or tribal government programs and departments?

If yes, who?

Capacity

Are there any products the company is capable of producing but is not specifically producing at the moment?

If yes, why is the company not producing said product?

Are there any specific types of processing the company is not currently capable of producing?

Are there any plans to expand the current production capability of the company?

Storage

Does the company have the capacity to store product for clients?

- Freezer:

- Cold:
- Dry:

If yes, how much (pounds and/or totes) and for how long?

Does the company have access to off-site storage capacity?

- Location:
- Capacity:

Shipping

How many shipping methods does the company use to send their products to clients? (List them)

What shipping method is the most used by the company?

Does the company have its own trucking operation?

If yes, how many trucks are currently used?

What is the farthest the company will send its own trucks to deliver product?

Does the Tribe have a trucking company?

If yes, does the seafood processing company use the trucking services?

Does the company sell any products at local markets?

Does the company sell any products on the regional and/or national markets?

Does the company sell any products on the international market?

Price

What are the average wholesale prices of each of the salmon products sold by the company?

Does the company sell any products retail?

What are the average retail prices of each of the salmon products sold by the company?

Outside Business

Does the company currently buy salmon from Tribal member fishers?

If yes, does the company only buy from Tribal member fishers?

Does the company currently buy salmon from non-Tribal fishers?

Does the company sell any salmon products to other Tribal businesses?

If yes, does the company sell salmon products to only Tribal businesses?

Tribe-to-Tribe

Is the company willing to sell product to other Tribal businesses at lower prices to keep product within Indian Country?

If it was financially viable, allowing the company to make a sustainable profit, would the company consider selling product only within Indian Country?

Would the company be willing to accept unprocessed seafood from other Tribes and/or Tribal processors to process?

Would the company be willing to send unprocessed seafood, in which they do not have capacity to process, to other Tribes and/or Tribal processors to process?

