

Spruce Root, Inc.

Strategic Plan

2025-2030



Spruce Root
COMMUNITY DEVELOPMENT



Spruce Root

COMMUNITY DEVELOPMENT



<https://spruceroot.org>



@ Spruce Root



@sprucerootalaska



Spruce Root



@sprucerootalaska

Spruce Root, Inc.

Strategic Plan

2025-2030



Introduction

In this document, lies Spruce Root's 2025-2030 Strategic Plan. We included the context behind the Strategic Plan, grounding our work in our history, place and process of how we got here. We want to say a special gunalchéesh, haw'aa, and thank you to the clients, Board members and staff who took hours to provide fundamental feedback to create our strategic plan and, more importantly, improve our work for Southeast Alaska.



Table of Contents

WHO WE ARE	7
OUR VALUES	8
OUR VISION / MISSION	9
OUR HISTORY	11
AAS KHWÁAN (TREE PEOPLE)	12
HOW WE GOT HERE	15
THEORY OF CHANGE	16
UNDERSTANDING OUR POSITION	18
ORGANIZATIONAL STRENGTHS & GROWTH AREAS	19
GOALS, OBJECTIVES & METRICS	20



The page features a decorative background of teal-colored pine branches and cones. The branches are scattered across the top and bottom, while two cones are positioned in the lower-left and lower-center areas. The overall aesthetic is clean and nature-inspired.

Who We Are

We begin our strategic plan by sharing who we are and where we operate to ground our work in our history and place.

Headquartered in Juneau, Alaska, Spruce Root is a Native-founded nonprofit Community Development Financial Institution (CDFI). We operate with the belief that the entire community benefits from locally-owned businesses that are strong and contribute to the local economy.



Our Values

Our values serve as guiding principles for our work and remind us what is important to us and those we serve. We are responsible to the Alaska Native people of Southeast Alaska.



Balance

Reciprocity



Progress over Perfection

Learning at the Speed of
Trust



Native Knowledge

Indigenous Stewardship



Equity

Abundance





Our Vision

Our vision is our hope for the future and future generations that we achieve through the work we do. By looking back to the responsibility carried by our ancestors, we define a better future for our children.

We amplify our Haida, Tlingit, and Tsimshian ancestral imperative to ensure Southeast Alaska thrives for future generations.

Our Mission

Our mission is the big picture aim of our work that we hope to achieve.

We are a driver of a regenerative economy across Southeast Alaska so communities can forge futures grounded in this uniquely Indigenous place.



OUR HISTORY

As a Native led organization, we recognize that we must look back to look forward. Our history guides us to our next horizon.

Spruce Root was founded in February 2012 with \$500,000 of seed money from Sealaska Corporation through Haa Aaní, LLC under the name Haa Aaní Community Development Fund, Inc.

As an emerging CDFI, we spent our infancy learning about CDFI best practices and raising capital to lend. By 2016, we had eight loans in our portfolio and \$5M in lending capital.

In early 2017, we changed our name to Spruce Root, Inc., transforming from an emerging CDFI into an established organization with the governance, staffing, and resources necessary to operate as an autonomous entity. Spruce Root became a Certified Native CDFI by the U.S. Department of Treasury in 2018.

Spruce Root has invested \$7.7 million since 2012 and as of December 31, 2025, our loan balance is over \$5 million, with 42 active portfolio loans and 65 since inception.

Community Development Financial Institutions are dedicated to providing financial services to meet the needs of economically disadvantaged individuals within under served communities. CDFIs invest in local communities and the residents who live there by providing critically needed financing often unavailable from mainstream financial institutions.

Spruce Root focuses its work across three program areas, the Sustainable Southeast Partnership (SSP), Business and Client Services and Lending. These programs weave collaboration, knowledge and capital to uplift the economy of Southeast Alaska.

Aas Khwáan (Tree People)

By: Taa Gooch, Clarence Jackson
Retold (by permission): Kingeistí, David Katzeek

This story was told by the late Clarence Jackson of the Tsaagweidí, Eagle/Killerwhale clan from Kake, Alaska. He told this story at the celebration held in Kake, Alaska in 2012. The celebration was Kake 100 Years Later. This marked the day when it was decided to set aside traditions, customs and practice of old, to pursue the new ways that were flooding the land with the coming of the Western European ways of living.

Kingeistí interpreted the story as the story was being told to a packed A.N.B (Alaska Native Brotherhood) Hall. The story was received with great joy and emotion that would be hard to describe. The spirit and response of this story could only be experienced to comprehend its power and its acceptance.

This is one of the most powerful stories about working together Wooch.een.



Story (Shkalneek)

Long, long ago before the great flood, this story took place.

It is said that the Tree People were plenty on the side of this one mountain not too far from here. One winter it snowed and snowed and snowed.

In the spring there was rain, wind and just miserable weather that the Tree People had to endure. Then, one day there was a great avalanche that started tearing down all the trees that were in its path. The powerful wind going before it was loud as it thundered down the mountainside.

It is said that all the trees were ripped down and that all the Tree People perished except for one tree at the top.

One day, the tree started to call out to see if there were any other trees that survived the great snow slide. He yelled out “Can you hear me out there? Can anybody hear me?” He did this every day for a long time until one day he heard a still, small voice say “I can hear you!”

Story (Shkalneek) Continued

The tree at the top called out “Do you know what happened to us?” The little tree yelled back “No! What happened?” The tree at the top said “a great snow slide wiped almost all of us out!” The tree at the top then asked the little tree “do you know why this happened?”

“No” said the little tree.

“It is because we thought we could stand by ourselves. We thought we did not need each other’s help and that we could stand tall and alone all by ourselves. So when this snow slide came, it killed almost all of us off on this mountain. We need to stand together, support each other with our roots and hold each other up. This is the way we will survive, by helping one another.”

Note from David

This is why, to this very day if you were to check the rooting system, you will notice that they are bound together in a tight weave and this is the way that we learned from the Tree People.

Notice that I emphasized the brief phrase “...with our roots.” In Tlingit culture and values, it relates to the families that we are rooted to through thousands of years of relationships. We are not here on our own; it took all of the people in our roots to be alive today. This is why our people called each other “precious children of the land.”

The storyteller said “let’s learn from our mistakes and stand together by helping each other with kindness, patience and love. We will hold each other up!

Yéi áwé



Slacktide Cafe

YAKUTAT, AK
907-410-7121




1111 WOODBINE
YAKUTAT, AK 99501
907-410-7121
www.slacktidecafe.com

SUMMER HOURS

SUNDAY 5AM-10AM
MONDAY 6AM-10AM, 12PM-4PM
TUESDAY 6AM-10AM, 12PM-4PM
WEDNESDAY 6AM-10AM, 12PM-4PM
THURSDAY 12PM-4PM
FRIDAY CLOSED
SATURDAY CLOSED

TO ORDER CALL OR TEXT 907-410-7121


BREAKFAST MENU

BREAKFAST SANDWICH \$12
Egg, sausage, or sausage, fried egg, and cheese
on a bun with hash browns, french fries, and coffee

BREAKFAST MUFFIN \$4
Egg, sausage, or sausage, french fries, and coffee

BREAKFAST BURRITO
Egg, sausage, or sausage, french fries, and coffee \$5

MEAT LOAF \$11
Egg, sausage, and sausage, french fries, and coffee

EGGIE \$5
Fried egg, sausage, french fries, and coffee

BEANS \$15
Bean, potato, sausage, french fries, and coffee

SIDES
COUNTRY GRavy \$4
PAPER TUBS \$5




LUNCH MENU
DINNER MENU


LATE FEBRUARY
MARCH

How we got here

The Spruce Root Board of Directors, staff and stakeholders began the process to build our new strategic plan over a series of meetings and activities in 2024 and 2025.

- The Board completed a SWOT analysis, reviewed client surveys and completed a theory of change and drafted strategic Goals
- Stakeholders including committee members, partners, community members and clients provided input through surveys on their hopes for Spruce Root and the region
- Staff met in person and virtually to provide feedback and distill insights from stakeholders and the Board
- The Board of Directors met to ratify the final Strategic plan



All of this work was coordinated by a Strategic Planning Committee made up of Board Members Joe Nelson and Anthony Mallott, Executive Director Alana Peterson, Deputy Director Will Kronick and Administrative and Human Resources Director Aldyn Brudie. Together Rising as an Environmental Community (TREC) provided guidance on the process, developing the surveys, collating survey findings and facilitating multiple meetings with the strategic planning committee.

THEORY OF CHANGE



Our theory of change defines the problem we address, what success looks like, the systems that will be navigated and the strategies needed to achieve our identified goals.

Southeast Alaska Indigenous communities have always found a way to thrive in place. Cultural currency: That's who we are and what we do. We find a way to survive and thrive in every village.

Southeast Alaska Native communities also face challenges rooted in a history of disruption, displacement, and extractive economies. Our stories instruct us that bad things happen when we live outside of our values and way of life.

Spruce Root works to build inspiring Indigenous economies across Southeast Alaska so communities can shape futures grounded in this place. An Indigenous economy is one that honors our way of life and is inclusive of all people who live here. We work to reinvent and expand the systems of our ancestors to ensure prosperity for the future.

We Believe:

- Economic development is a catalyst for our community and environmental wellbeing.
- Change happens through knowledgeable, skilled people who value interdependence and collaboration.
- Indigenous values and economies are essential to a healthy community.

We create change by centering Indigenous values in economic development through three strategies:

- Wealth – Ancestral definition of wealth: Community wellbeing and health, what we can give away and how we can support our opposites.
- Knowledge – Growing skills and leadership.
- Relationship – Strengthening connections and trust.

We create thriving economies and opportunities for all, honoring our responsibility to Alaska Native people of Southeast Alaska.



Understanding Our Position

Completed September 9, 2024 Kake, Alaska by the Spruce Root Board of Directors

Spruce Root enters the next five years with a strong foundation rooted in Indigenous leadership, deep community trust, and the ability to convene interests across Southeast Alaska. The organization’s holistic program model—combining CDFI lending, technical assistance, and the SSP—positions Spruce Root as both a catalyst and a collaborator in shaping a regenerative, Indigenous-led economy.

Strengths include the organization’s strong reputation, culturally grounded approach, and ability to facilitate honest dialogue on complex regional issues. Spruce Root is recognized for its visionary leadership in emerging sectors, particularly in natural capital markets, cultural and knowledge economies, and co-management futures. Internally, the organization has built flexible lending and TA programs that support entrepreneurs, communities, and Tribal initiatives.

At the same time, Spruce Root faces several internal weaknesses that must be addressed in the coming years. Operational models—such as the TA framework, lending identity, and funnel pathways—need refinement to ensure clarity, consistency, and efficiency. Staff capacity and funding diversification must grow to meet the scale of demand from communities and regional partners.

The broader climate offers significant opportunities, including emerging markets, expanded infrastructure and renewable energy investments, and the rise of Indigenous-led cultural and knowledge economies. Youth leadership programs and the growth of remote/hybrid work also create pathways for village-based careers. Spruce Root is well positioned to serve as a regional convenor by leading scenario planning and fostering shared vision across Tribes, ANCs, communities, and investors.

However, threats remain substantial. Environmental risks from transboundary mining, continued reliance on extractive industries, increasing outside ownership of land and capital, and potential erosion of cultural identity threaten long-term regional stability. Workforce and political shifts—such as the possibility of the state capital relocating—could further marginalize Southeast Alaska. These challenges underscore the need for intentional, Indigenous-centered economic development and strong, place-based institutions.

Overall, this analysis highlights the importance of strengthening Spruce Root’s convening role, refining its program models, expanding mission-aligned capital tools, and supporting community-driven, culturally grounded economic futures. These insights guide the strategic priorities for the coming planning period.



Organizational Strengths & Growth Areas

Strengths

Indigenous-Centered Leadership & Trust

Deep, long-standing relationships with Tribes, Alaska Native Corporations, and rural communities grounded in cultural respect and accountability.

Strong Convening & Mediation Capacity

Proven ability to bring diverse interests together, facilitate dialogue, and build shared understanding across sectors and communities.

Integrated, Culturally Grounded Programming Holistic approach across CDFI services, technical assistance (TA), Shared Services Program (SSP), and youth leadership development.

Recognized Visionary in Regenerative Economies Widely viewed as a leader in Indigenous innovation and regenerative economic models.

Challenges & Growth Areas

Role Clarity & Boundary Definition

Need for clearer articulation of who Spruce Root serves and how boundaries are defined across TA, lending, and programmatic support.

Capacity Constraints

Staffing levels do not yet match regional demand; long-term sustainability requires diversified and flexible funding sources.

Evolving Operational Models

TA, CDFI, and SSP structures continue to mature and require stronger internal alignment and external clarity.

CDFI Identity Tension

Balancing traditional lending expectations with Spruce Root's impact-driven, mission-forward approach.

STRATEGIC PLAN: GOALS, OBJECTIVES & METRICS (2025–2030)

How to Read This Plan

Goals describe the big-picture aim. Objectives define what measurable outcomes indicate success and will be revisited and revised each year as needed. Strategies, developed through annual work planning, outline how we will achieve the objectives, and metrics show how we will track progress.



Goal One:

Utilize Indigenous knowledge and values to drive innovation and to address economic challenges in Southeast Alaska

Objectives:



1. Programs prioritize village and Indigenous led decision making to support vibrant economies in Southeast Alaska
 - a. Ex. Yak Tat Kwaan logic model, financial wellness and 1:1 support
2. Financial products, investments and technology solutions support businesses rooted in Indigenous values
3. Work with partners to build and deliver youth programming specific to business and innovation
4. Strengthen traditional trading relationships inside and outside the region through lending activities, partnerships, and funding

Metrics:



1. # of unique individuals served and percent who identify as Alaska Native
2. # of hours provided to clients (across all programs)
 - a. BCS as tracked through OTIS
 - b. Lending as tracked through DownHome
 - c. SSP as tracked through OTIS
3. # of Southeast Alaska communities served as measured by communities where participants reside
4. \$ dollars supporting indigenous individuals and/or entities
5. # of local jobs created or retained

Goal Two:

Build relationships and networks to support collaboration

Objectives:



1. Support and participate in convenings and projects to address complex challenges in SE Alaska problems (e.g. housing, childcare, AMHS etc.)
2. Shared approaches that align with Indigenous approach to resources (e.g. convening is a leadership skill, pooled services, catalysts, partnerships etc.)

Metrics:



1. Number active partners (employed) by sector (ANC, Tribe, non-profit, municipality, business rep, NGO) & community. Measured by MOUs/MOA's, participants at SSP retreat, biannual surveys at network calls, & other non-business support over the year (ex: CIA at BOD retreat)
2. Degree of engagement as measured by survey they do/don't participate in.
3. # hours of SR staff-led networking and/or capacity building events (measured in network calls, SSP hangouts, AK start up call, WFD call etc.)
4. # of catalyst positions funded and filled. (e.g. 8/10 catalyst positions filled)
5. \$'s deployed to support partnerships

Goal Three:

Attract investment to support sustainable and innovative economic growth in the region

Objectives:



1. Build, monitor, and utilize a "Projects Seeking Funding" list in the region to support and track the effectiveness of investments (as tracked/defined by metrics below)
2. Spruce Root grows our CDFI revenue to increase economic impact in Southeast Alaska
3. Develop and grow product offering for revenue streams to deliver facilitation and planning support.
4. Loans furthering the mission of Spruce Root

Metrics:



1. Annual Growing Southeast Alaska: Our Impact by the Numbers
2. Investments in Native Communities: \$X
3. Investments in all communities: \$X
4. Ratio of investments in business owned by Indigenous people to investments in non-Indigenous enterprises to investments outside of SE (need to define goal ratio)
5. Subawards and subgrants: \$X
6. Loans Deployed: \$X
7. Loan Capital deployed (# of loans and total funds) since inception
8. Current value of SCT/change over time
9. Number of projects getting funded annually/total number of projects on list

Goal Four:

Commit to transparency and accountability

Objectives:



1. Spruce Root programs are visible and engage diverse participation from our communities
2. Spruce Root Board and committees are actively engaged in the work of the organization

Metrics:



1. # of newsletter subscriber and social media views, clicks and engagement (and change over time)
2. Publish 990, Annual Report, & Audit to website annually (as soon as available)
3. Publish set or subset of these metrics to be easily viewable online (so folks can see what we're doing)
4. Board attendance (X/8) [Internally tracked and reported]
5. Number of external shares and to who (ex: Alana presents to Sealaska BOD)
6. Perceived transparency as measured by annual survey

Internal Development Goal

Our staff and programs have the resources and skills to fully meet our clients where they are. Spruce Root is an organization in which we are a quality employer that supports quality employees. For every employee that comes through Spruce Root, they go on to further our mission whether at Spruce Root and beyond

Objectives:



1. Staff are supported to excel and grow
2. Programs have the funds they need to serve Spruce Root Clients
3. Track list of Spruce Root Alumni who go on to pursue transformative work

Metrics:



1. Amount of operational/unrestricted funds (meaningful when include trajectory/change over time)
2. Level of Staff satisfaction as measured by annual survey
3. Exit evaluations



Glossary

Core Concepts

- **Indigenous Knowledge & Values:** Foundations guiding decision-making, program design, and economic innovation.
- **Innovation:** The act of taking one or more things that already exist and combining them in a new way. We seek innovative solutions rooted in culture, stewardship, and regenerative economic principles.
- **Sustainable & Innovative Economic Growth:** Growth that honors culture, supports local ownership, and protects land, water and Indigenous ways of life.

Key Programs & Systems

- **SSP (Sustainable Southeast Partnership):** Regional collective impact network for community-led, Indigenous-centered development.
- **BCS (Business & Client Services):** Technical assistance, coaching, and business support services.
- **CDFI (Community Development Financial Institution):** Spruce Root's lending and investment arm providing flexible, mission-aligned capital.
- **OTIS & DownHome:** Internal tracking systems for SSP and Lending/BCS programs.

Funding & Investment Terms

- **Financial Products:** Loans, equity investments, forgivable loans.
- **Equity Investments:** Ownership stakes supporting Indigenous-led enterprises.
- **Revenue Streams:** Lending revenue, facilitation, contracts, grants.
- **Unrestricted/Operational Funds:** Flexible organizational support.
- **Seacoast Trust (SCT):** Long-term regional stewardship endowment.

Collaboration & Convening

- **Convening:** Bringing people together to build shared understanding.
- **Pooled Services:** Shared infrastructure and staffing across partners.
- **MOA/MOU:** Formal partnership commitments.
- **Network Calls:** Regular touchpoints strengthening regional collaboration.

Clients & Community

- **Communities Served:** Number of Southeast Alaska communities represented by participants.
- **Financial Wellness / 1:1 Support:** Individualized financial coaching.
- **Youth Programming:** Leadership and business training for emerging leaders.
- **Catalyst Positions:** Community-based staff driving local initiatives.

Planning & Evaluation

- **Goals / Objectives / Strategies / Metrics:** Frameworks that define what Spruce Root aims to achieve, how it works, and how progress is tracked.
- **Logic Model:** Program roadmap connecting activities to long-term outcomes.

A tall, carved wooden totem pole with multiple faces, set against a blue sky. The totem pole is the central focus of the image, with several distinct faces carved into it. The faces have large, expressive eyes and some have their hands near their mouths. The wood is weathered and has a natural, aged appearance. The background is a clear, bright blue sky.

PHOTO CREDITS

HÁW'AA GUNALCHÉESH T'OYAXSUT 'NÜÜSM TO CHLOEY CAVANAUGH FOR DESIGNING THIS STRATEGIC PLAN AND THE PHOTOGRAPHERS WHO HAVE GENEROUSLY CONTRIBUTED THEIR WORK TO THIS PROJECT AND MANY OTHERS: BETHANY GOODRICH, LEE HOUSE, SHAELENE GRACE MOLER, MURIEL REID, LIONE CLARE, RYAN MORSE, COLIN ARISMAN, IAN JOHNSON, AND SCOTT BURTON. THEIR IMAGES HELP BRING THIS STRATEGIC PLAN TO LIFE.

