

SKILLS ADVISORY PANEL SKILLS REPORT

EXECUTIVE SUMMARY MARCH 2022



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BACKGROUND

In March 2021, SELEP's Skills Advisory Panel (SAP) produced a full Skills Report, which was published on the SELEP and South East Skills website and by the Department for Education. This update (March 2022) pulls out the key aspects of the original report, with a refresh of key information alongside a full refresh of the core indicator set/ evidence base.

There are also now two Chamber of Commerce led Local Skills Improvement Plan (LSIP) trailblazers in the SELEP area – in Sussex and Kent and Medway, with aligned college led Strategic Development fund programmes. Essex, Southend and Thurrock partners are also developing local Skills Plans to align with the LSIPs. It has therefore been agreed with the Department for Education (DfE) that SELEP's SAP should produce an Executive Summary and data refresh of the Skills Report, rather than a new full Skills Report.

Statement from the Department for Education (DfE) **Skills Advisory Panels: The National Context**

Since 2018, Skills Advisory Panels (SAPs) have been bringing together employers, skills providers and key local stakeholders to better understand and resolve skills mismatches at a local level. SAPs are part of Mayoral Combined Authorities and LEPs and there are 36 in total across England. The DfE has supported SAPs with grant funding primarily to produce high-quality analysis of local labour markets and publish Local Skills Reports, which set out the local skills strengths and needs and how the SAP proposes its area addresses its key priorities.

This second iteration of SAPs' Local Skills Reports comes at a time when DfE is Trailblazing new Local Skills Improvement Plans (LSIPs), in eight areas of the country, including in Kent and Sussex which are within the SELEP area. Developed by Employer Representative Bodies, LSIPs are part of a suite of reforms launched in DfE's "Skills for Jobs" White Paper that aim to put employers more firmly at the heart of the skills system. An evaluation of the eight Trailblazers will inform the national roll out of the programme. In the meantime, and before LSIPs are rolled out across the country, it is DfE's intention that Skills Advisory Panels and this Local Skills Report should continue to influence the behaviour of local partners and feed intelligence to central government, including to sectoral focussed skills teams and the national-level Skills and Productivity Board (SPB).



OPENING STATEMENT FROM SELEP'S CHAIR AND DEPUTY CHAIR

We are pleased to share this Executive Summary version of SELEP's SAP Skills report, along with refreshed evidence base. It has been a period of considerable change, both nationally and locally, and with the impact of the pandemic still being felt. As this report will set out, we have continued to achieve much in the skills landscape through our SAP and Digital Skills Partnerships and with strong collaboration and partnerships across the LEP area. We'd like to thank everyone involved in making this happen and look forward to seeing further progress.



Christian Brodie SELEP Chair



Sarah DanceSELEP Deputy Chair

INTRODUCTION FROM HELEN CLEMENTS, SELEP SKILLS ADVISORY PANEL CHAIR



It is my pleasure to introduce this executive summary version of our Skills Report, setting out our work to date. Our SAP was formed in September 2019 and has gone from strength to strength, with a fantastic range of employers representing our key sectors and from across the SELEP geography. I've been a member since the beginning, representing the construction sector (Morgan Sindall) and was thrilled to become SAP Chair in September 2020.

SELEP is the largest LEP area nationally, with a population set to increase to 5 million by 2039. The geography includes East Sussex, Essex, Kent, Medway, Southend and Thurrock and is home to eight ports, two airports and a number of major projects. It is a diverse area, with coastal, urban

and rural areas and close proximity to London. We are home to nearly 178,000 enterprises, 98% of which are small or micro. Our members reflect the variety of our key sectors and business sizes and include BT, HSBC, Konica Minolta, Oakdown Care Home, Stansted Airport, DP World London Gateway, Berry Gardens, Screen South, Metal and Sussex Chambers of Commerce. Importantly, our membership also includes further and higher education, training providers, the National Careers Service and STEM Learning. We regularly have guest speakers from organisations such as the Careers Enterprise Company and the Restart Programme.

The pandemic has continued to present us with challenges, and it has been striking at our meetings over the last year that all sectors are struggling to recruit, across a wide range of roles



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INTRODUCTION FROM HELEN CLEMENTS, SELEP SKILLS ADVISORY PANEL CHAIR CONTINUED

and as also evidenced in our data. This is therefore a key priority area for all of us. One of our biggest challenges is still in raising awareness of the sectors we represent and the range of roles within them to both adults and young people. To that end, our virtual careers fair, held in October 2021 in partnership with the Digital Skills Partnership has been a real highlight, attracting over 400 visitors and creating a great set of careers presentations from many SAP members, along with a careers magazine spotlighting many of our sectors.

It has also been very positive to work with the SELEP Skills Major Projects Group, which includes some of the biggest projects nationally located in the local area. These include the Lower Thames Crossing, Ebbsfleet Garden City, Bradwell B, the London Resort and the UK Health Security Agency. In collaboration with the SAP, a report has been produced to better understand the collective skills needs of these projects and we are pleased to be working with the group on an action plan to deliver against this, soon to be launched through a webinar.

We continue to deliver in other areas too, with new videos of tutors having been added to the SELEP funded www.becomealecturer.org site and with the SAP feeding into the development of SELEP's Covid-19 Recovery Funds supporting people into work and with digital kit and connectivity. European Social Fund (ESF) programmes across the SELEP area have now supported over 45,000 people across our geography, including into our sectors.

SELEP's capital investments in colleges and universities are also continuing to result in new industry relevant facilities and buildings. We are thrilled that an Institute for Technology was announced for the SELEP area in December 2021, with many of our SAP employers involved. We are also pleased to be working with the two LSIP trailblazers in our area and contributing to their development and looking forward to engaging in areas of work set out in the Levelling Up White Paper such as the Future Skills Unit and Skills Bootcamps. I hope you will find this Executive Summary and accompanying data set useful and informative – keep updated on all that's happening on skills at southeastskills.org.uk.

Helen Clements, Skills Advisory Panel Chair



SKILLS ADVISORY PANEL MEMBERS

| NAME | ORGANISATION | REPRESENTING |
|------------------------------------|---|--|
| HELEN CLEMENTS (CHAIR) | MORGAN SINDALL | CONSTRUCTION |
| ANGELA O'DONOGHUE (VICE CHAIR) | SOUTH ESSEX COLLEGE | FURTHER EDUCATION AND SELEP BOARD MEMBER (CHAIR, SKILLS WORKING GROUP) |
| JEREMY KERSWELL (VICE CHAIR) | PLUMPTON COLLEGE | FURTHER EDUCATION (VICE CHAIR, SKILLS WORKING GROUP) |
| JANE THOMAS | BT GROUP | DIGITAL AND TELECOMMUNICATIONS |
| LIZ AUSTIN | STANSTED AIRPORT | AIRPORTS AND TOURISM |
| ana christie | SUSSEX CHAMBERS OF COMMERCE | SMES |
| ANDREA CUNNINGHAM | METAL | CREATIVE |
| SAMANTHA DESFORGES | BERRY GARDENS | FOOD PRODUCTION |
| DIANA GARNHAM | RDBINSIGHT | CHAIR, SKILLS EAST SUSSEX |
| IAIN HAWTHORN | HSBC | FINANCE |
| REBECCA SMITH | SOCIAL ENTERPRISE KENT | VOLUNTARY AND COMMUNITY |
| LINDSEY HAYWARD | KONICA MINOLTA | ENGINEERING |
| KARRIS ROWBOTHAM | DP WORLD LONDON GATEWAY | LOGISTICS |
| OLIVIA WHITE | CGN (BRADWELL B) | ENERGY |
| JO NOLAN | SCREEN SOUTH | CREATIVE |
| MIKE DERRICK | OAKDOWN HOUSE | CARE |
| PAUL WINTER | WIRE BELT COMPANY | CHAIR, KENT AND MEDWAY SKILLS COMMISSION |
| AMY CABLE/JESSICA POWER | LOWER THAMES CROSSING/ HIGHWAYS ENGLAND | MAJOR PROJECTS |
| PAULINE SMITH | CXK, NATIONAL CAREERS SERVICE | CAREERS SUPPORT |
| VANESSA POTTER | SUSSEX COUNCIL OF TRAINING PROVIDERS | INDEPENDENT TRAINING PROVIDERS |
| FIONA MCGONIGLE/ LAUREN KEATING | ANGLIA RUSKIN UNIVERSITY/ UNIVERSITY OF KENT | HIGHER EDUCATION |
| HOLLY AQUILINA | EAST SUSSEX COUNTY COUNCIL | LOCAL AUTHORITIES |
| AJAY SHARMAN | STEM LEARNING | STEM/DIGITAL SKILLS PARTNERSHIP |



THE REFRESHED DATA HEADLINES AND KEY TAKEAWAYS

A full set of data is available in the accompanying data annex published with this executive summary. Some key headlines include:

| | SELEP | ENGLAND |
|--------------------------------|-------------------|--------------------|
| TOTAL POPULATION | 4,283,100 | 56,287,000 |
| WORKING AGE POPULATION | 2,574,500 (60.1%) | 33,233,900 (62.3%) |
| * SKILLS LEVEL 1+ | 89.2% | 87.9% |
| SKILLS LEVEL 2+ | 77.1% | 78.0% |
| SKILLS LEVEL 3+ | 57.1% | 61.2% |
| SKILLS LEVEL 4+ | 37.3% | 42.8% |
| NO QUALIFICATIONS | 5.8% | 6.2% |
| WEEKLY WORKPLACE EARNINGS | £574.90 | £613.30 |
| WEEKLY RESIDENT-BASED EARNINGS | £632.20 | £613.30 |
| OUT OF WORK BENEFIT CLAIMAINTS | 103,445 (4.0%) | 1,557,415 (4.4%) |
| AGED 16-24 (JAN 22) | 17,365 (5.5%) | 244,655 (NA) |

^{*} Skills levels are for working age population, Source: nomisweb.co.uk

- Workplace earnings continue to be below the national average although increasing from last year and resident earnings are still above the national average, partly as a result of high levels of commuting to London from many parts of the geography.
- The SELEP area continues to have an above average population aged 65+ and below average aged 20-34 which has implications for the health and care sectors. The overall population is set to continue growing.
- Skills levels have generally improved but with SELEP still below the national average for level 4 qualifications and with 5.8% of the working age population having no qualifications.
- Apprenticeship achievements in 2021/21 at 10,670 were 10% up on the previous year but remained much below the previous level in 2017/18 of 17,250. The share of achievements by subject area in SELEP is very similar to the national distribution.
- Benefit claims have fallen significantly since last year, with claims totalling 103,445 compared to 150,695 in January 2021.
- Vacancy levels remain high with all sectors reporting challenges in recruiting and across a
 wide range of roles.



KEY ACHIEVEMENTS — 2021/22

 A Virtual Careers fair in October 2021 opened by Rt Hon Robert Halfon MP and attracting over 400 visitors and more than 2000 booth visits and featuring presentations and stands from SAP employers. Speakers included a keynote from SAP member Iain Hawthorn (HSBC), and presentations from SAP Chair, Helen Clements (Morgan Sindall) as well as Jo Nolan (Screen South) and Lauren Edmunds (Lower Thames Crossing). Presentations all now available on the South East Skills website.



- The production of a Careers Magazine in collaboration with Career Map and spotlighting SAP sectors and work such as the major projects.
- The addition of new tutor videos featuring local colleges on the SELEP funded www.becomealecturer.org site.
- The launch of SELEP's £4.4m Covid Recovery Programmes in June 2021, informed by the Skills Advisory Panel and supporting individuals into key sectors and with digital kit and connectivity.
- A webinar with SELEP's Major Projects Skills Group, in May 2021 working with SAP Chair Helen Clements and developing a skills action plan.
- The continued growth of the South East Skills website, showcasing the work of the SAP and Digital Skills Partnership.
- The launch of new European Social Fund projects including Community Grants and Step Up – over 45,000 people have been engaged in ESF programmes across SELEP to date.
- Continued capital investment in skills facilities with over £70 million invested so far and including facilities such as Plumpton college facilities for the agri-food sector, USP College XTEND campus (using virtual reality) and North Kent College Production and Digital Arts Facility.
- Promotion of apprenticeships during National Apprenticeship week and including a campaign to showcase local employer events and SAP Apprenticeship videos.
- Continued collaboration with SELEP's Digital Skills Partnership
 which has continued development of a Digital Skills Prospectus and taken part in
 a hackathon with the University of Greenwich, the Office For Students (OFS) and
 Foundervine, offering around 40 undergraduates the chance to work upon a real-life,
 industry-based challenge to take the prospectus to the next level.









 The Digital Skills Partnership also partnered with Coursera in 2021, seeing 2200+ registrations from residents in the SELEP area and with courses curated according to skills gaps in the region and high vacancy areas. Residents were able to access courses free of charge due to this partnership. The DSP was also involved in a programme of Google Digital Garage events for SMEs and charities in collaboration with other DSPs nationally and with a good level of attendance from the SELEP area.



Supported the successful South Essex College led Institute for
 Technology which includes SAP employers and sectors and further and higher education
 partners across the SELEP geography including DP World (London Gateway), Port of
 Tilbury, Princess Alexandra Hospital Group, Leonardo and Morgan Sindall. Training will
 be provided in higher technical skills including transport and logistics, engineering and
 manufacturing, health, science, construction and built environment.

SECTOR HEADLINES AND GROWTH

The SELEP area is nationally and internationally important - home to key sea and airports and road and rail infrastructure key to the UK's economy and supply chain and providing a gateway to the world and the rest of the UK. This area is vital and instrumental in keeping people, goods and services moving and enabling international trade. With world-leading companies including household names such as Ford, Saga, London Stansted Airport, P&O Ferries, Konica Minolta, Eurotunnel, Royal Opera House, Turner Contemporary, Maidstone Studios, DP World London Gateway and Amazon, to name a few, as well as a wide range of small and start-up businesses in sectors such as digital, creative and construction.

| SECTOR | SELEP PICTURE NOW | FUTURE OUTLOOK/PANDEMIC IMPACT |
|--------------------|---|---|
| CONSTRUCTION | 27,325 enterprises 124,000 employee jobs Ageing workforce Disproportionately male workforce Competition from London Vacancies include quantity surveyors, bricklayers, architects and carpenters | Continued growth - up to 300,000 new homes across SELEP Large infrastructure projects, as per SELEP's Major Projects Group Growing need for green and low carbon skills, digital practices in sector Public perception hindering new entrants Large requirements for 'off site' jobs |
| HEALTH AND CARE | 7,240 enterprises 229,000 employee jobs Disproportionately female workforce (particularly Care) Occupations and vacancies include care workers, nurses, social workers and residential care managers | Population growth & ageing population (up to a fifth) will impact on sector Public perception of sector (particularly care) hindering recruitment but good opportunities to progress Opportunities to use digital technologies in care Increase in need and vacancies through pandemic. Some reduction of EU and overseas care workers. Pandemic raised the profile of the sectors |



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| SECTOR | SELEP PICTURE NOW | FUTURE OUTLOOK/PANDEMIC IMPACT |
|-------------------------------------|--|--|
| IT, DIGITAL AND CREATIVE | 86,000 employee jobs 19,170 enterprises IT disproportionately male Creative sector has a lot of freelancers - lack capacity to engage in traditional skills models (e.g. apprenticeships) Vacancies include software developers, coders, IT support, graphic designers and programmers) | A number of clusters across SELEP and significant activity through areas of work such as the Creative Estuary Eastbourne creative clusters and London Resort Digital roles required across all sectors given the 'digital revolution' Sizeable Games, Entertainment and cultural part of sector likely to see growth IT jobs resilient and saw growth through the pandemic. Creative sector - negative effect with high levels of furlough (70%+) & lack of income. |
| FINANCE | 3,020 enterprises 43,000 employee jobs Strong relationship to Londonhigh commuting to finance jobs Occupations and vacancies include insurance underwriters, finance analysts, sales related roles and financial managers | Trend for some finance companies in London relocating to parts of SELEP due to available workforce / lower rents Growing need for IT (software) skills due to online nature of industry Potential risk of jobs moving elsewhere in Europe or beyond Continued operation through pandemic as move to home working. Longer-term could see a shift in the London focus. |
| MANUFACTURING AND ENGINEERING | 98,000 employee jobs Disproportionately male workforce Ageing workforce Internationally famous companies (i.e. Ford, Raytheon, e2v) Occupations and vacancies include mechanical engineer, production manager, engineering manager, test engineer | Public perception of sector hindering recruitment Ageing workforce likely to impact on skills needed – high need for technical skills Impact of digital and robotics on future skills requirements Reduction in employment overall projected but replacement of ageing workforce, the need for digital skills and competition from other sectors means skills shortages still likely |
| TRANSPORT AND LOGISTICS | 6,270 enterprises 96,000 employee jobs Disproportionate male workforce Of national significance: SELEP has 9 Ports and airports One of top sectors recruiting during pandemic Vacancies include HGV driver, forklift truck driver, warehouse manager, transport manager and depot manager | Impact of digital and robotics on future skills requirements (e.g. automated warehousing) 2 Freeports in SELEP area Parts of sector (e.g. HGV driving) saw huge increase in demand through pandemic |



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| SECTOR | SELEP PICTURE NOW | FUTURE OUTLOOK/PANDEMIC IMPACT |
|---|---|---|
| AGRICULTURE AND LAND-BASED | 6,000 enterprises Rich and diverse food production/manufacturing sector showcasing innovations and importance of food security/links to tourism Some famous companies, e.g. Thanet Earth and Rathfinny Wines Vacancies include landscaper, veterinary nurse and farm estate worker | Important to food security and potential move to more UK production if imports become costly Misconceptions of sector Innovations in areas such as wine production could lead to further growth Growing need for farm-based R&D and response to climate change Increased demand through pandemic and spotlight on the sector which has increased training demand. |
| EDUCATION | 152,000 employee jobs 2,935 enterprises Reported difficulties recruiting and retaining staff Vacancies include education teaching professionals, teaching assistants, primary and nursery education teaching professions | Largely public sector so reliant on public funding but a continued need given population growth General challenge in schools, colleges and universities to recruit to sector specialisms especially where there are shortages in the sector itself |
| PROFESSIONAL, SCIENTIFIC AND TECHNICAL (CROSS SECTOR PRIORITY AREA) | 27,950 enterprises 112,000 employee jobs Reflecting the high level of technical and higher-level jobs across SELEP Reflects jobs in sectors such as IT, construction and also legal | Technical roles are increasing and likely to continue to do so as well as legal and medical roles Factors such as climate change and exploring new approaches to areas such as crop growth could be an area for expertise and expansion Institute for Technology in SELEP area |
| ENERGY AND UTILITIES | 17,500 employee jobs Occupations and vacancies include water and sewerage operatives, engineering technicians and business sales executives | The sector reports requirements in engineering and experiencing similar shortages to the engineering sector Likely future need for intelligent energy systems that track usage as well as skills around technologies such as solar, wind and carbon capture |
| ACCOMMODATION, FOOD, HOSPITALITY AND TOURISM | 8,615 enterprises 119,000 employee jobs Particular focus in some of SELEP's coastal and rural areas Links to agriculture and land- based Occupations and vacancies include restaurant manager, bar staff, hotel manager | Continued adaptation of the market through trends such as Airbnb Growth of jobs across the SELEP (pre pandemic) through increase in new restaurants, hotels and bars High employee turnover rate Huge impact from pandemic with high rates of staff furloughed (70+%). Recovering now |



SELEP'S SAP PRIORITIES AND VISION

As part of the 2021 Skills Report, the SAP revisited the priorities and vision set out in the SELEP Skills Strategy 2018-2023. These were updated to reflect areas such as clean growth, diversity and inclusion. To this end, the SAP is working against the following priorities and vision which remain relevant and which there has been delivery against as per the key achievements set out above.

Vision: to help deliver a flourishing and inclusive economy across the biggest LEP in the country by equipping employers, adults and young people with the skills, conditions and aptitudes required for significant and clean growth today and tomorrow.

Priorities:

- Increase apprenticeships and industry relevant qualifications for all ages, particularly in priority sectors and at higher and degree level
- Simplify the landscape for employers, stakeholders and individuals
- Build a diverse and inclusive economy and reduce polarisation
- Raise awareness of jobs and growth across SELEP and the area's size, scale, national and international significance
- Foster and support the spirit of pride, entrepreneurship innovation and enthusiasm across SELEP to bring about change

SELEP's SAP has also continued to review key issues set out in the original skills strategy and whether they remain a priority. In some cases, these have increased in importance due to the pandemic and labour shortages:

| 2018-2022 STRATEGY HEADLINE | STILL A CHALLENGE/ PRIORITY FOR 2022? |
|---|--|
| Skills levels below the national average at levels 2-4 | YES – but improving |
| 210,000 people with no qualifications | YES – but improving – now 148,600 |
| Nearly 68,000 people on out of work benefits | YES – now 103,445 |
| 163,000 workless households | YES - still 155,400 |
| Workplace earnings below national average/neighbouring LEPs | YES – still below |
| Some of the most deprived and most wealthy areas nationally | YES |
| Fluctuating apprenticeship numbers and short-term decline | YES – recent decline |
| Declining adult participation in further education | YES |
| High levels of out commuting to London / surrounding areas | Possible area of change – more WFH |
| Shortage of Tutors | YES |
| A need for more flexible, modular training | YES |
| Lack of awareness of key sectors and opportunities? | YES |



THE NATIONAL PICTURE AND THE YEAR AHEAD

It is a period of significant change nationally and locally, due to the pandemic, major growth, net zero and factors such as national policy changes and labour market shortages across all sectors. The digital revolution continues to impact and to provide opportunities such as flexible and online working and training as well as barriers such as digital poverty. Some jobs will increasingly be impacted by automation also. The Levelling Up and 'Skills for Jobs' White Papers include commitments to the skills landscape. Some of these are as follows and which it will be important for the SAP to engage with.

The Levelling Up White Paper includes a Skills mission that 'by 2030 the number of people successfully completing high quality skills training will have significantly increased in every area of the UK. In England this will lead to 200,000 more people successfully completing high quality skills training annually, driven by 80,000 more people completing courses in the lowest skilled areas.'

| POLICY AREA | SAP ENGAGEMENT |
|--|--|
| Local Skills Improvement Plans (LSIPs) | Continue to support and work with LSIPs and the roll out to other areas – support other local skills plans (e.g., Essex and Thurrock underway) |
| Skills Bootcamps | Continue to promote and support to ensure Bootcamps are responding to local employer need |
| Institutes of Technology (IoT) | Support the SELEP IoT |
| T Levels and Apprenticeships | Continue to promote and address barriers. Higher Technical Qualifications from Sept 2022 & enhanced apprenticeship recruitment service |
| Lifetime Skills Guarantee | Flexible support to train and retrain plus free approved Level 3 qualification – raise awareness locally |
| UK Shared Prosperity Fund | Including support to adults with Maths Skills. Support and help to inform the focus for UKSPF including sharing learning from ESF programmes |
| Future Skills Unit | To engage with the unit and utilise labour market information and insights provided |



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In addition to engaging with the policy areas set out above, the SELEP SAP will:

- Continue to engage with programmes of work such as Restart, The Enterprise Adviser Network and ESF Programmes
- Continue to work with the SELEP Skills Major Projects group, with a webinar and action plan proposed for April 2022
- Collaborate with the education sector on the teacher and tutor shortage issue and seek shared solutions
- Continue to evolve and expand the South East Skills website and resources
- Support the proposed roll out of the Digital Skills Partnership to the Catalyst South geography, working with neighbouring LEPs (subject to year 4 funding)
- Showcase the European Social Fund projects (national event on 17th March includes SELEP spotlight)
- Publish an evaluation and case studies from the SELEP Covid-19 Recovery Skills Programmes
- Explore future events and webinars on particular themes and topics for 2022

The SAP will continue to be led by evidence and to utilise and share the data, reports and intelligence gathered for this report and beyond. Information will be shared via the South East Skills website. The data will also continue to help with identifying areas of geographical need or cohorts requiring additional support.

The SAP is looking forward to continuing to deliver and work in partnership in the year ahead.

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