

2010

"More than ever in our lifetimes, we need reliable information about the economy. Whether in the world of business, education, non-profits or government, we need to make decisions that can affect us and others for years. The [Bureau] helps to ensure that those decisions are based upon the best available data and predictions."

– Royce Engstrom,

President, The University of Montana



Bureau of Business and Economic Research Annual Report FY 2009-10

Bureau of Business and Economic Research
The University of Montana Missoula
Gallagher Business Building, STE 231
Missoula, MT 59812-6840
Telephone: (406) 243-5113
Fax: (406) 243-2086
www.bber.umt.edu



The Bureau of Business and Economic Research has been providing information about Montana's state and local economies for more than 50 years.

Housed on the campus of The University of Montana-Missoula, the Bureau is the research and public service branch of the School of Business Administration.

On an ongoing basis, the Bureau:

- analyzes local, state, and national economies;
- provides annual income, employment, and population forecasts;
- conducts extensive research in the industries of forest products, manufacturing, health care, and Montana KIDS COUNT;
- designs and conducts comprehensive survey research from its on-site call center;
- presents the annual Montana Economic Outlook Seminar in nine cities throughout Montana; and
- receives prestigious national awards for publications including the Montana Business Quarterly.



As the old Chinese proverb goes, we certainly do live in “interesting times.” It’s been an interesting – and challenging – time to be in the research business in Montana. The less than robust economy has made life harder for all of us, but it has also made getting good information on policy choices more important than ever. And at the Bureau of Business and Economic Research, we’ve never been busier.

This annual report is our yearly effort to communicate the flavor of what we do in the Bureau. For more than 60 years we’ve been proud to serve as the primary research center in The University of Montana’s School of Business Administration. It’s always difficult to jot down on a few pages everything that we do. But every time we try, we learn something more – and we’re delighted to share that with you.

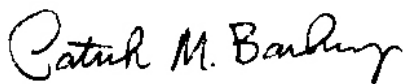
We’ve had a full transition of leadership here in the BBER, but I am happy to say that all of our senior staff members who have served as the “face” of our center for so long are still playing a major role in research projects. Paul Polzin, former BBER director, continues to be involved with the economic outlook and, of course, our outlook seminars. Charles Keegan, former director of forest industry research, has been active in developing and expanding our role as one of the premier university research centers in the forest products industry. And Stephen Seninger, former director of health care industry research, has been very involved in a variety of projects around the state.

We continue to grow our roles in policy analysis. In 2009-10, the Bureau acquired the REMI model, a state-of-the-art analytical tool we have put to good use in a number of studies. We have expanded and solidified our abilities to reach out to cell-only households as part of our survey research strategy. And we are working on ways of making our research reports more interactive through electronic delivery.

But one thing that has not changed is our commitment to relevant and high-quality research. We jealously guard our reputation as a trusted, sought-after source of information and expertise on economic issues of importance to Montanans. If you, or your organization, have questions or information needs that we can help you with, we would be delighted to hear from you.

Here’s wishing you and your organization a safe and prosperous year.

Sincerely,



Patrick M. Barkey
Director

Mission Statement

The Bureau's purpose is to serve the general public, as well as people in business, labor, and government, by providing an understanding of the economic environment in which Montanans live and work.

Among the BBER's noteworthy accomplishments for 2009-10 were:

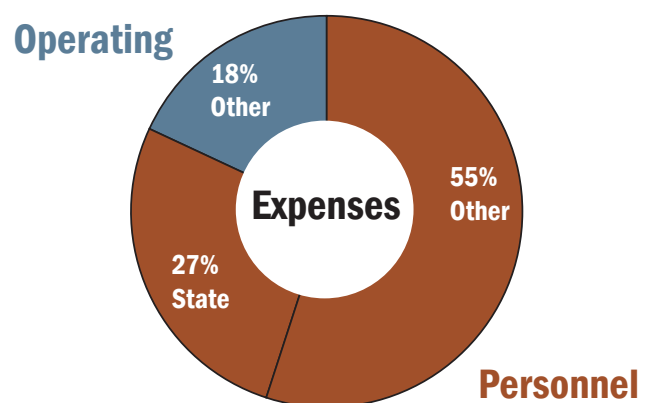
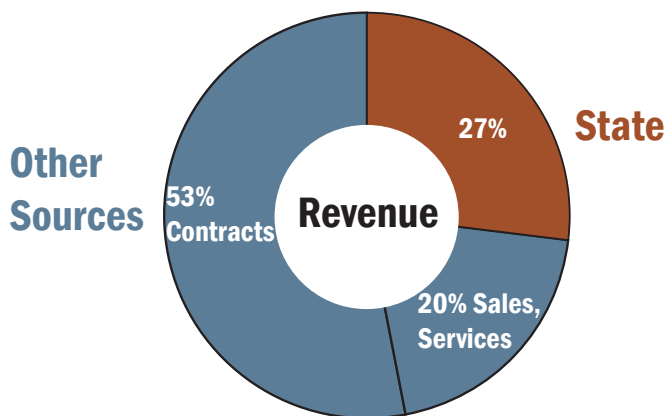
- We had a very successful nine-city Economic Outlook Seminar program, with attendance down only 3 percent from the all-time high in 2009. The keynote address on "Economic Recovery: What's Ahead for Men and Women Workers" by Professor Wendy Stock from MSU-Bozeman was well received.
 - The Bureau continues to raise its national profile, and now serves as the business office and secretary-treasurer for the Association for University Bureaus of Economic Research (AUBER), the national organization of business research centers, founded in 1948. This continues a long tradition of intensive involvement of BBER in its national organization. Two past BBER directors have served as AUBER presidents.
 - The Bureau served as host for the Pacific Northwest Regional Economic Conference in May, a two-day conference on regional economic issues that drew professionals from the entire region to Missoula to hear presentations on green energy, rural economic development, and the overall economic outlook.
 - Old is new again in survey research. The BBER's Weed Management Preference survey avoided the undercoverage bias in telephone surveys due to growth in the cell phone only population by using a mail survey instrument with several full color illustrations to explain the pros and cons of various weed management strategies.
 - Health care news dominated in 2009-10, and BBER's health care research director Gregg Davis was involved in number of studies and forums, including an impact study of the Benefis Health-care System in Great Falls that attracted statewide attention.
 - The BBER released its economic impact report on The University of Montana-Missoula, the first to explicitly take into account the increased earnings power of UM graduates. A similar study is currently being conducted for Montana State University.
1. Continue the Bureau's tradition of delivering and communicating relevant research that meets the needs of its clients and partners;
 2. Work with all BBER staff to continue to exchange ideas and methods to make our efforts as cost-effective as possible;
 3. Explore ways of expanding information delivery to a statewide audience; and
 4. Continue to transition staff into new leadership roles in key BBER functional areas.
- The BBER's Forest Industry Research Program has been actively involved with the Montana Biomass Working Group, and are about to begin a cooperative effort to better understand how to optimize the benefits and maximize the sustainability of generating woody biomass energy from Montana forests.
 - The Forest Industry Research Program has additionally worked in cooperation with researchers at the Rocky Mountain Research Station and UM's College of Forestry and Conservation recently completing a study for the Joint Fire Science Program. The study examined the economic and financial information and tools available to western public land managers seeking to reduce hazardous fuels by removing and using woody biomass.
 - Montana KIDS COUNT program enters their tenth year at the Bureau and continues to work on projects around the state to increase awareness and understanding of data surrounding Montana's children and families. Projects have included compiling tribal health profiles, a needs assessment of the state Head Start programs, and work to increase awareness of early childhood programs among the state's business leaders.

Goals for 2010-11

The BBER managed to retain its healthy financial status in 2009-10, despite the turbulence in the economy. Overall spending, as shown, was nearly identical to the previous year. Revenues continue to come in primarily from grants and contracts, with state funding making up a little more than a 25 percent share of the total. We have remained successful in serving the research needs of our clients, although the challenges in securing the resources to support our activities continue to be significant.

	2008-2009		2009-2010	
Total Revenue	\$1,817,960	100%	\$1,823,243	100%
State funds	\$485,668	27%	\$497,034	27%
Other sources	\$1,332,292	73%	\$1,326,209	73%
Contract research	\$1,025,756	56%	\$958,917	53%
Sales and service, gifts	\$306,536	17%	\$367,292	20%
Total Expenses	\$1,817,960	100%	\$1,823,243	100%
Personnel services	\$1,424,104	78%	\$1,492,418	82%
State funds	\$478,921	26%	\$492,558	27%
Other sources	\$945,183	52%	\$999,859	55%
Operating expenses	\$393,855	22%	\$330,826	18%
State funds	\$6,746	0%	\$4,476	0%
Other sources	\$387,109	21%	\$326,350	18%

2009-2010



Program Overview

Economic Analysis

The Bureau's forecasting system provides public and private decision-makers with reliable forecasts and analysis. The Bureau monitors all aspects of the state's economy, focusing on. It looks at major industries and their impact on the economy and keeping tabs on Montana's people, where they live and work.

The **Economics Montana** program provides yearly forecasts of Montana personal income and its components, as well as nonfarm wage and salary employment. In addition to the statewide forecasts, annual projections are prepared for Lewis and Clark, Cascade, Missoula, Yellowstone, Silver Bow-Deer Lodge, Ravalli, and Flathead counties. These forecasts are featured in news releases and media interviews, used extensively in other Bureau programs, and are frequently cited by the Bureau in public appearances.



Manufacturing and Forest Products

This was a year of ongoing changes and challenges for the **Forest Industry Research Program**. One of the program's long-standing employees, Jason Brandt, left in April 2010 to take on a new career with the Forest Service in Boise, ID. We hired Charlie Gale in August 2009 and Ben Fitch-Fleishman in April 2010 to help keep our staffing and projects on course. Charlie is the first undergraduate hire to the program, but he has brought a great deal of enthusiasm, eagerness, and substantial experience communicating with forest products firms. Ben came to us with a MS in Economics and has also been a great communicator, helping us to collect quite a bit of data from Montana mills during his summer with BBER before heading to Oregon to pursue his PhD.

This year, the forest industry research program substantially increased its work with the **USDA Forest Service's Forest Inventory and Analysis Program (FIA)**, expanding the scope of influence from the eight Interior West and five Pacific Northwest states to the 24 northern and 13 southern states. A new agreement with the **Northern Research Station** to enhance their regional **Timber Products Output Program** and help "nationalize" the entire program should benefit not only BBER and the FIA program but data users across the country seeking more information on the changes, sustainability, and economic impacts of the forest industries.

BBER's Forest Industry Research Program has

remained an active partner with the University of Idaho and Washington State University in the **Inland Northwest Forest Products Research Consortium**, which is part of the **Wood Utilization Research** network with centers at 13 universities in as many states. Work with these long-term cooperators, as well as with new ones, is increasingly related to carbon sequestration, woody biomass for fuel and energy, and economic sustainability of the wood products industry. Demand for our information and analytical services has been growing, particularly among these emerging areas of interest, and we expect continuing growth in the next few years.



Survey Research

The Survey Research Program conducts surveys throughout the United States and Canada. Survey research services include planning, sampling, instrument design, focus groups, and analysis. The survey research program includes telephone surveys, face-to-face interviewing, Web-based surveys, and focus-group capabilities. Throughout FY 2009-10, survey research continued to add vital information to policy holders at the state and local level, conducting phone and Web surveys from the local to international level. In addition to these services, the Bureau began conducting telephone surveys to cell phone users to capture the growing number of households without a land-line telephone. The Bureau hopes to expand this service for clients to address technology changes in the future.

The **Montana Poll** is an ongoing statewide telephone survey. The Montana Poll is a registered trade name owned by the Bureau and is the original poll in

Montana. Conducted by telephone, the poll uses the Bureau's random-digit sampling and computer-assisted telephone systems. The poll provides crucial data and information not available elsewhere, such as Montanans' use of home computers and Internet access.

The **Qualitative Research Program** enhances the Bureau's research capabilities by revealing a target audience's range of behavior and the perceptions concerning specific topics or issues. This program uses in-depth studies of small groups to guide and support the derivation of hypotheses which are descriptive rather than predictive. Qualitative research contributes to rich, insightful findings. Methods include in-depth interviews with individuals, group discussions, diary and journal exercises, and in-context observations. Qualitative research projects have been completed for private and nonprofit firms in Montana, as well as for the Montana Department of Public Health and Human Services.

Internet Usage and Availability Trends in Montana : Distance Learning Survey Uncovers New Data

From watching some popular television shows, you might think that information on just about anything is just a few keystrokes away. Those of us in the research business in Montana know otherwise. In fact, even information about the information revolution itself – and how many people are fully participating in it – is frustratingly hard to obtain.

The BBER's survey research center participated in a project that got a bit closer to finding some answers. A study on the demand for distance learning education, sponsored by the Montana Commissioner for Higher Education, asked Montanans how, where, and whether they used Internet. The results were the first comprehensive assessment of high speed Internet access statewide.

About 84 percent of Montanans told us that high speed Internet was available where they currently live. That number is higher for high-income households and homeowners and lower for American Indian households and those who live in Eastern Montana. Patterns of Internet usage are remarkably varied as well. Only 5.9 percent of adult Montanans told us that they did not use Internet, but a sizable number for some subpopulations access the Web from places other than their homes – including libraries and Internet cafes.

Is there a digital divide in Montana? The data point toward at least a small one. And it's the first time we've had the information to even describe it.

For the full report, visit <http://mus.edu/online/DistLearningSurvey-0610.pdf>

Health Care and Social Policy Analysis

The Bureau continuously monitors markets, trends, industry structure, and costs related to the health care industry. Physical and mental health is as basic to overall well-being as employment, wages, or the absence of poverty, making Montana's health status and its determinants as important as the state's economic and social trends. Current research includes health care regulation and reform, medical costs, the health insurance industry, environmental health factors, and the availability of medical care services throughout Montana.

The **Economic Evaluation of Social Policy** program conducts evaluations of a wide range of social policies implemented by federal, state, and local governments in Montana and throughout the Pacific Northwest. Policy areas evaluated include employment development for low-wage, unskilled workers; risk prevention programs for alcohol, tobacco and drug use; economic development programs; and public health activities dealing with

child safety and health and health care access for the poor. Major funding sources include the U.S. Department of Health and Human Services, foundations, and other private sources.

The **Montana KIDS COUNT** project is a statewide, collaborative effort bringing together a wide range of organizations including businesses, nonprofits, and government agencies interested in, or involved with, children and families. The Montana KIDS COUNT Data Book is published annually and includes information concerning demographics, health, vital statistics, and education. This book is designed to provide the most current and accurate data and indicators to policy-makers, legislators, educators, parents, and others throughout the state. Additional projects are being added to Montana KIDS COUNT, and a more extensive community outreach is being conducted to increase exposure of the program and utilization of the data.



Publications and Outreach

As the state's premier center for economic analysis, the Bureau must provide accessible means of disseminating the information via various forms of print publications, online information, and outreach programs.

Total attendance at the 35th Annual **2010 Montana Economic Outlook Seminars** was down only slightly with 1,405 registrations. This accounted for only a 3 percent decrease over 2009, which was better than expected in the tough economic climate. In addition to the seven major cities regularly on the program, the Bureau travelled to northern and central Montana to present the full seminar in Lewistown and Havre. The conference theme focused on the recession's impacts on men and women workers in Montana, specifically looking at how men were hit harder in joblessness and income losses in the state. The keynote presentation was provided by Wendy Stock, a professor of economics and department head of Agricultural Economics and Economics at Montana State University. Additional presentations were made by Montana University System professionals in the areas of nonresident travel, health care, agriculture, real estate, and manufacturing and forest products.

In the summer of 2009, we continued to partner with the Montana Chamber of Commerce to offer a summer outlook program in Kalispell to business professionals at the Montana Governor's Cup annual event. We also expanded the Summer Outlook to do presentations in

seven cities throughout the state as well. This midyear outlook reexamines the state and local economic forecasts accounting for changes in the economy since the Montana Economic Outlook Seminar.

The **Montana Business Quarterly (MBQ)** serves as the premier business and public policy publication in the state. Innovative design and editorial procedures facilitate understanding of complex topics and concepts. In addition to provocative articles on pressing topics, the MBQ regularly includes analyses of local area, state, and national economies. This year, the Montana Business Quarterly reported on a wide variety of topics such as health care reform, labor market trends, the biomass energy industry, the Smurfit-Stone closure, and baby boomer migration patterns.



The Bureau's website, www.bber.umt.edu, provides the most recent data on Montana's economy, as well as updates regarding current research, recent surveys, and economic news. The Bureau's website also allows visitors to subscribe to the MBQ, correspond with Bureau employees, and register for the Economic Outlook Seminars.

The Montana Economic Minute was started in January of 2009 and consists of a daily one-minute podcast that airs on radio stations throughout the state. Patrick Barkey records the segments and provides local and national economic insight that is both timely and newsworthy. The podcast is also featured on the Bureau's website where listeners can subscribe to the podcast and automatically receive the information.

Service to the University, Professional Associations, and the Community

Bureau personnel continue to serve on numerous UM faculty and staff committees and to perform other service functions. Among the committees are the School of Business Administration Research Advisory Committee, Montana Manufacturing Extension Advisory Board, and a number of graduate thesis committees. Bureau personnel maintained leadership positions and were active participants in their respective professional associations. Among the associations are the National Association of Business Economists; Association of University Bureaus of Economic Research; Western Regional Science Association; Research and Methods Committee for the U.S. Census Bureau's Federal-State

Cooperative for Population Estimates; Society of American Foresters; Forest Products Society; Society of American Foresters Philosophy and History Working Group; Forest Inventory and Analysis

Ownership Team; Forest Products Society, Forest Products Society reviewer; Forest Products Journal reviewer; Society of American Foresters reviewer; Montana Epidemiological Workgroup; and Montana Council for Maternal and Child Health.

During FY 2009-10, Bureau personnel made numerous speeches and presentations to various groups across Montana, the Northern Great Plains region, and throughout the United States and were interviewed and quoted by newspapers, TV, and other media. The Bureau's reputation as an accurate source for Montana economic data and analysis is documented by interview and information requests from various local and national media organizations. Bureau representatives have become regular participants of the Western Economic Outlook sponsored by the Pacific Northwest Regional Economic Conference, the Society of American Foresters, and the Association for University Bureaus of Economic Research (AUBER) and other regional outlook conferences, and attended by the national and international media.

Bureau Advisory Board

The BBER Advisory Board was created in 1988 to forge a closer link between the staff and director of the Bureau and its stakeholders around the state. The board meets semi-annually and consists of 8 rotating members that serve a three-year term. It has served over the years as a vital sounding board for policy decisions, exchanging information and alerting BBER staff about economic trends as well as opportunities for research and outreach. Since its founding the BBER advisory board has produced over 50 "alumni" in all parts of Montana, from both the private and public sector, and we have benefited greatly from their insights and expertise.

- Advisory Board Members -

Elizabeth Ching

Office of U.S. Senator
Max Baucus
Billings, MT

Patrick Corcoran

North Western Energy
Butte, MT

Barbara Stiffarm

Opportunity Link, Inc.
Havre, MT

Dan Villa

Office of the Governor
Helena, MT

Timothy P. Waldo

First Security Bank
Fort Benton, MT

Larry White

UM School of Public &
Community Health Sciences
Missoula, MT

Todd Younkin

Department of Labor and
Industry, Research and
Analysis Bureau
Helena, MT

Contract Research in 2009-10

Economic Analysis

The Economic Contribution of TechLink to the Regional Economy. Sponsored by TechLink, Montana State University, Bozeman, February 2010. A study to quantify the economic contribution of TechLink to the regional economy of Idaho, Wyoming, Utah, North and South Dakota, Washington, Oregon, Alaska, and Montana as the result of its efforts to partner private industry to Department of Defense technologies.

The Economic Contribution of the Proposed North Coast Hiawatha Passenger Rail Transit in Montana. Sponsored by the Montana Department of Transportation. An economic impact assessment of bringing back the North Coast Hiawatha Passenger Rail to Montana, quantified in terms of employment, labor income and potential sales to Montana businesses.

The University of Montana: Growing Montana's Economy. Sponsored by the University of Montana Office of the President, Missoula, February 2010. This study expanded and updated previous efforts to quantify the economic contribution of UM by considering the University's impact from a statewide perspective, as well as explicitly considering the impact of higher earnings enjoyed by UM graduates who remain in the state.

Planning for North Toole County's Economic Future. Prepared for the North Toole County Economic Development Group. A multi-faceted project that combined a community assessment survey, an economic projection and an analysis of the potential impact of energy and other developments on the local economy.

Housing Affordability and Montana's Real Estate Market. Prepared for the Montana Association of Realtors, June 2010. A study of the supply and demand trends impacting home prices and rents in Montana's major real estate markets.

Forest Products and Manufacturing Research

Enhancing the Timber Products Output (TPO) Program in the Northern U.S. and Developing a Strategic Plan for Nationalizing TPO is a joint venture agreement with the USDA Forest Service, Northern Research Station, St. Paul, MN, to develop a strategic plan for enhancing the TPO program at the Northern Research Station and a strategic vision for nationalizing the TPO program across all 50 states.

Region One Logging Costs a challenge cost share agreement with the USDA Forest Service, Region One, Missoula, MT, to conduct an analysis of logging and log-hauling costs in Montana and Idaho.

Pacific States Forest Industry and Timber Harvest Analysis a cooperative research agreement with the USDA Forest Service, Pacific Northwest Research Station, Portland, OR, to conduct a comprehensive analysis of the primary forest products industry in Alaska, California, Hawaii, Oregon, and Washington by examining trends in wood products, industry structure, source of timber supply, and employment.

Inland Northwest Forest Products Research Consortium 2010, a cooperative multi-state research, education, and extension service sub-award to bring together the Bureau of Business and Economic Research at The University of Montana with the Forest Products Laboratory at the University of Idaho and the Wood Material and Engineering Laboratory at Washington State University. These departments provide multi-disciplinary teams to address research questions involving forest products in the region.

Ongoing Timber Product Output, Removal, and Forest Industry Analysis for the Interior West States, a cooperative research agreement with the USDA Forest Service, Rocky Mountain Research Station, Ogden, UT, to provide a comprehensive analysis of timber use and impact on timber inventory in the Rocky Mountain region.

Idaho Logging Utilization, a cooperative research agreement with the USDA Forest Service, Rocky Mountain Research Station, Ogden, UT, to study and report on the quantities of logging residue generated while harvesting timber in Idaho.

Inland Northwest Forest Products Research Consortium 2008, a cooperative state research, education, and extension service sub-award to bring together the Bureau of Business and Economic Research at The University of Montana with the Forest Products Laboratory at the University of Idaho and the Wood Material and Engineering Laboratory at Washington State University. These departments provide multi-disciplinary teams to address research questions involving forest products in the region.

Conversion and Recovery Trends in the Western U.S. Sawmill Industry, a cooperative research agreement with the USDA Forest Service, Pacific Northwest Research Station, Portland, OR, to provide updated estimates of the amount of mill residue and lumber created from processing timber with volumes reported in various units of measure.

Western Managers' Knowledge and Use of Available Economic and Financial Biomass Information, a cooperative research agreement with the USDA Forest Service, Forest Products Lab, Madison, WI, and Joint Fire Sciences Program Boise, ID, to provide synthesis of information products available to federal land managers to enhance their understanding of economics of wood removed in fire hazard reduction treatments.

Inland Northwest Forest Products Research Consortium 2006, a cooperative state research, education, and extension service sub-award to bring together the Bureau of Business and Economic Research at The University of Montana with the Forest Products Laboratory at the University of Idaho and the Wood Material and Engineering Laboratory at Washington State University. These departments provide multi-disciplinary teams to address research questions involving forest products in the region.

Survey Research

University of Montana Student's Athletic Interests Survey. A survey administered for The University of Montana Athletic Department to learn about students' athletic interests.

Planning for North Toole County's Economic Future. Prepared for the North Toole County Economic Development Group. A multi-faceted project that combined a community assessment survey, an economic projection and an analysis of the potential impact of energy and other developments on the local economy.

Distance Learning in Montana: A Survey-Based Assessment. Produced for the Office of the Commissioner of Higher Education, Montana University System, May 2010. A comprehensive assessment of the preferences, capabilities and experiences of the Montana adult population regarding training and education delivered electronically

Montana Manufacturers' Survey. A survey administered for BBER's Manufacturing Research Program that examines the annual business performance of Montana's largest manufacturing firms.

Montana Poll. A survey administered for the Bureau of Business and Economic research that tracks Montana consumer sentiment, food insecurity in Montana, computer ownership and Internet access, and other important demographic characteristics of Montana residents.

Weed Management Preference Survey. A survey administered for a consortium of federal land management agencies, including the Bureau of Land Management, the USDA Forest Service, and the National Park Service, that explores the preferences of Oregon, Idaho, Washington, and Montana residents regarding noxious weed management.

Health Care and Social Policy Analysis

The Economic Cost of Alcohol Abuse in Montana. A report in conjunction with the members of the Montana Epidemiological Work Group, formed as part of the Strategic Prevention Framework State Incentive Grant to address substance abuse in Montana.

2008 Montana County Health Profiles. A contract with the Montana Department of Public Health and Human Services to gather county-specific data on demographic and health status indicators, such as population data broken down by age, race, and gender, birth rate, infant mortality rate, median household income, leading causes of death, and availability of health resources like hospitals, nurses, doctors, and dentists.

Montana American Indian Health Profiles. A contract with the Montana Wyoming Tribal Leaders' Council to gather race-specific data on demographic and health status indicators for the state of Montana and for the eight American Indian tribes in the state

Early Childhood Comprehensive System Planning and Implementation. Montana is in its sixth year of funding from the Maternal and Child Health Division for the Early Childhood Comprehensive System (ECCS) Planning Grant. Montana KIDS COUNT continues to do the evaluation of this project.

Head Start Collaboration. Montana KIDS COUNT was contracted to conduct the evaluation of the Head Start Collaboration project in the state.

SAMSHA Strategic Prevention Framework – State Incentive Grant. This project is designed to help states determine their most significant substance abuse problem and then to support communities as they plan to build a solid foundation for determining environmental strategies to reduce the problem.

The Economic Contribution of the Benefis Health System to the Cascade County Economy. A study to quantify in terms of employment, labor income and sales the contribution of the Benefis Health System to the economy of Cascade County.

Publications

Publications completed in 2009-10

Economic Analysis

Barkey, P.M., 2009. "The Economic Cost of Alcohol Abuse in Montana." *Montana Business Quarterly*, Vol.47, No.2., Summer 2009

Barkey, P.M., Sylvester, J.T., 2009 "Housing Affordability and Montana's Real Estate Markets." *Montana Business Quarterly*, Vol.47, No.2., Summer 2009

Barkey, P.M., 2009. "Economic Outlook: Montana's Recovery is Closer." *Montana Business Quarterly*, Vol.47, No. 3., Autumn 2009

Polzin, P.E., 2009. "Local Area Outlook." *Montana Business Quarterly*, Vol.48, No.1., Spring 2010

Barkey, P.M., 2009. "National and State Outlook" *Montana Business Quarterly*, Vol.48, No.1., Spring 2010

Morgan, T.A., Barkey, P.T., Polzin P.E., 2009. "Smurfit-Stone Mill Closure Will Have Lasting Impacts on Montana's Economy." *Montana Business Quarterly*, Vol.47, No. 4., Winter 2009

Forest Products and Manufacturing Research

Morgan, T.A., 2009. "Woody Biomass: Can Forests Fuel Our Future?" *Montana Business Quarterly*, Vol.47, No. 4., Winter 2009

Morgan, T.A., Keegan, C.E., 2009. "Montana Manufacturing Industry." *Montana Business Quarterly*, Vol.48, No.1., Spring 2010

Morgan, T.A., Keegan, C.E., 2009. "Montana Forest Products Industry." *Montana Business Quarterly*, Vol.48, No.1., Spring 2010

Brandt, J.P., T.A. Morgan, M.T. Thompson. 2009. Wyoming's forest products industry and timber harvest, 2005. *Resour. Bull. RMRS-RB-9*. Fort Collins, CO: U.S. Department of Agriculture, Forest Service, Rocky Mountain Research Station. 28p.

Healey, S.P., J.A. Blackard, T.A. Morgan, D. Loeffler, G. Jones, J. Songster, J.P. Brandt, G.G. Moisen, and L.T. DeBlander. 2009. Changes in timber haul emissions in the context of shifting forest management and infrastructure. *Carbon Balance and Management* 2009, 4:9.

Keegan, C.E., T.A. Morgan, K.A. Blatner, and J.M. Daniels. (In press) Trends in lumber processing in the western United States, part 1: board foot Scribner volume per cubic foot of timber. *Forest Products Journal* 60(2):xx-xx.

Keegan, C.E., T.A. Morgan, K.A. Blatner, and J.M. Daniels. (In press) Trends in lumber processing in the western United States, paper 2: overrun and lumber recovery factors. *Forest Products Journal* 60(2):xx-xx.

Loeffler, D., J. Brandt, T. Morgan, and G. Jones. (In press). *Forestry-based Biomass Economic and Financial Information and Tools: An Annotated Bibliography*. Gen. Tech. Rep. RMRS-GTR-xxx. Fort Collins, CO: USDA, Forest Service, Rocky Mountain Research Station. xx p.

Morgan, T.A., J.P. Brandt, J. Baldrige, and D. Loeffler. (In press). Use of financial and economic analyses by federal forest managers for woody biomass removal. *Western Journal of Applied Forestry* 25(xx).

Keegan, C.E., T.A. Morgan, J.P. Brandt, and J. Baldrige. 2010. Results from the 2009-2010 Montana Manufacturers Survey. Bureau of Business and Economic Research. 7p.

Brandt, J.P., T.A. Morgan, C.E. Keegan, F.G. Wagner, and S.R. Shook. 2010. Idaho's forest products industry: current conditions and forecast 2010. Idaho Forest, Wildlife and Range Experiment Station, Moscow, ID. Station Bulletin 96 4p.

Morgan, T.A., Keegan, C.E., "Montana's Forest Products Industry" *Montana Business Quarterly*, Vol. 47, No.1. Spring 2009.

Survey Research

Baldrige, J., 2009. "Montana's Labor Poll: More Workers than Anticipated Available to Fill Jobs." *Montana Business Quarterly*, Vol.47, No. 3., Autumn 2009

Sylvester, J.T., "Four-Wheeling: Off-Highway Vehicle Use Growing." *Montana Business Quarterly*, Vol.47, No.2., Summer 2009

Health Care and Social Policy Research

Davis, G., 2009., "Pre-Existing Conditions Limit Job Flexibility." *Montana Business Quarterly*, Vol.47, No.2., Summer 2009

Davis, G., 2009., "Health Care Reform: What Should We Expect?" *Montana Business Quarterly*, Vol.47, No.3., Autumn 2009

Davis, G., 2009., "Healthy People 2010" *Montana Business Quarterly*, Vol.47, No.3., Autumn 2009

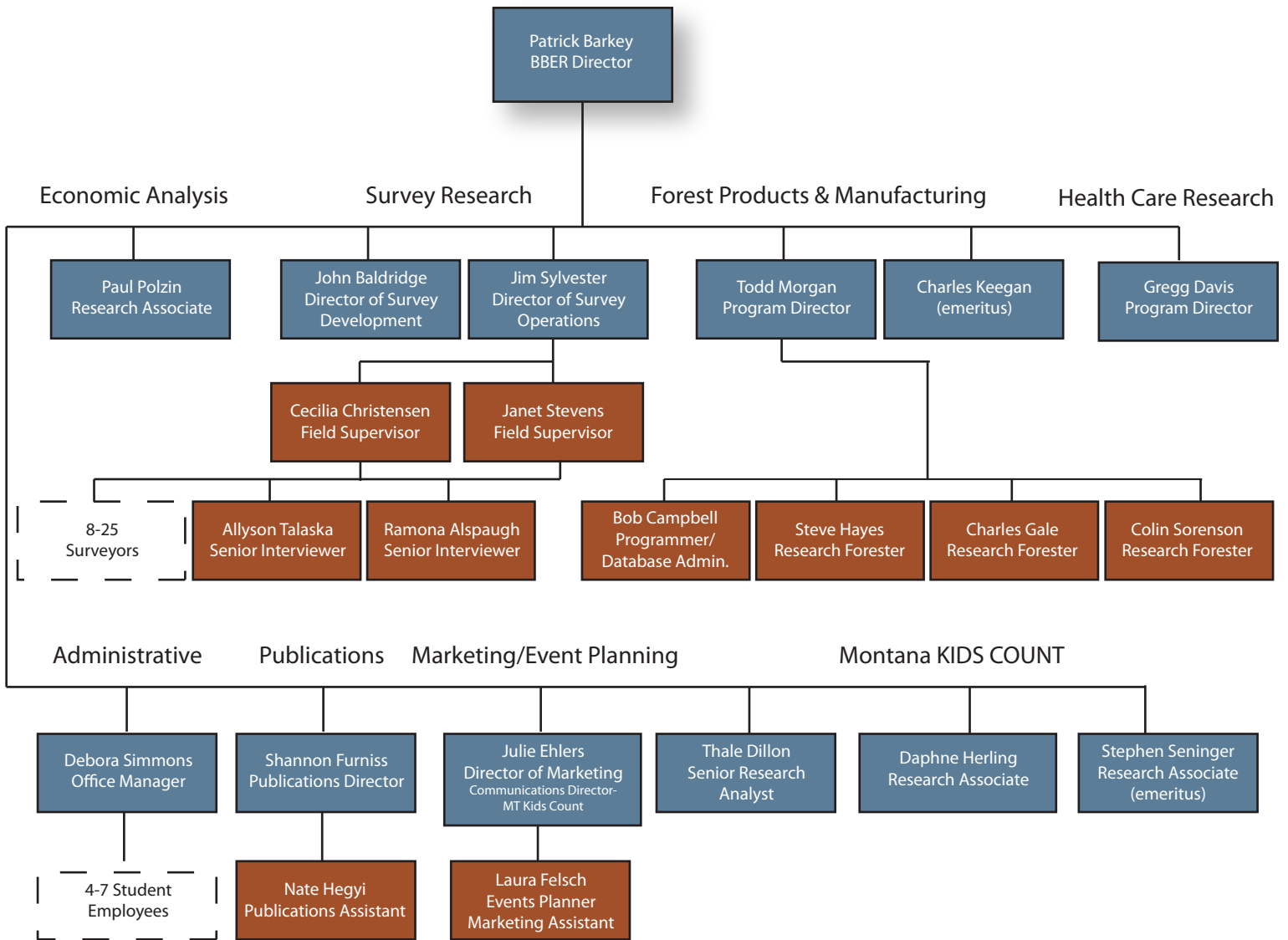
Davis, G., Roberts, T., White, L.T., 2009. "Montanans' Health May Be Compromised by Declining Number of Primary Care Physicians." *Montana Business Quarterly*, Vol.47, No. 4., Winter 2009

Dillon, T., 2009. "Too Much Junk Food and T.V.? Obesity Epidemic on Upward Trajectory." *Montana Business Quarterly*, Vol.47, No. 4., Winter 2009

Ehlers, J.L., 2009. "Today's Children, Tomorrow's Business Leaders: Early Childhood Investment Important for Current and Future Workforce." *Montana Business Quarterly*, Vol.47, No. 4., Winter 2009

Davis, G., 2009. "Women's Health Care: Why it Matters in the Health Care Reform Debate." *Montana Business Quarterly*, Vol.48, No.1., Spring 2010

Organizational Chart



Effective Date: 11/17/2010