

2009

"The Bureau of Business and Economic Research may be one of the very best examples of utilizing industry experts throughout the Montana University System. The end result is a center that is recognized as one of the very best research bureaus in the nation."

- Larry Gianchetta, Dean of the School of Business Administration, The University of Montana Missoula



Bureau of Business and Economic Research Annual Report FY 2008-09

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**BUREAU OF
BUSINESS
AND ECONOMIC
RESEARCH**

The Bureau of Business and Economic Research has been providing information about Montana's state and local economies for over 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 9 cities throughout Montana;
- Nationally recognized for our award-winning publications including the Montana Business Quarterly.



Thanks for looking over the 2008-09 annual report of the Bureau of Business and Economic Research at The University of Montana. It is hard to put in these few pages all of the accomplishments and contributions of our talented staff. But it's certainly worth making the effort.

What a year it has been for the economy. Ben Bernanke may say that the recession is "technically over," but there are plenty of tough challenges that remain for businesses and organizations all across Montana.

Tough economic times have at least shined a bright light on economists this past year. The 2009 Economic Outlook Seminars set new records for attendance. And the Bureau's newly expanded summer outlook update program, in partnership with the Montana Chamber of Commerce, was also very well received. BBER experts in forest products research and health care have been busy giving presentations and responding to the media on the outlook for their areas as well.

Just as Montana has weathered the economic storm a bit better than some other states, so has the BBER has managed to remain vibrant and reasonably healthy despite the economic challenges. Centers in other states have not been so fortunate. The current economic climate makes it even more important that we continue to deliver research and information of value to our clients and to the public.

I am very happy to report that the Bureau heads into the new fiscal year with all of its senior positions now filled, with the addition of Gregg Davis as our new director of health care research. Gregg brings a wealth of both health care and Montana experience to the BBER, and with the health care reform debate raging, has hit the ground running.

The Bureau has been around since 1948, and we've been changing over all of those years. Those changes continued in 2008-09. We re-launched our Web page, started producing daily podcasts on economic issues, and redesigned the inside cover of the Montana Business Quarterly. We've worked with new clients and new partners on projects, and have developed new capabilities in economic analysis and survey research. We've also applied our expertise in wood products and forest management to study newly emerging opportunities in biomass production and carbon sequestration.

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'd 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.

Tough times for the economy translated into increased attention and exposure to the activities of the Bureau of Business and Economic Research in 2008-09. Outlook Seminar attendance again reached an all-time high, thanks to a timely and outstanding program, as well as keen interest in the economic situation. We also expanded the Bureau's outlook activities in the summer, delivering an outlook update in six Montana cities. All of the BBER's major programs were very active over the year as well.

Among the BBER's noteworthy accomplishments for 2008-09 were:

- An all-time high of 1,442 registrations for the 34th Annual Economic Outlook Seminars held in nine Montana cities in January-March, up 5 percent from the previous year;
- A newly expanded midyear economic update program, conducted in partnership with the Montana Chamber of Commerce, travelled to Kalispell, Billings, Bozeman, Helena, Missoula and Great Falls during the summer of 2009, attracting high attendance and significant media attention;
- The Bureau's home page, www.bber.umt.edu, was completely redesigned and relaunched, including a daily podcast on the Montana economy that is also broadcast on radio stations statewide;
- Gregg Davis, formerly director of the Center for Business Information and Research at Flathead Valley Community College, became the Bureau's new director of health care research;
- Gathering the most timely, accurate, and comprehensive information the state economy, releasing major reports on labor force availability, housing affordability, and the economic impact of alcohol abuse;
- The high quality and professionalism of Bureau publications were recognized in three national awards bestowed to the BBER for the Montana Business Quarterly, the Economic Outlook booklet, and the Montana Kids Count Data Book;
- Expertise on the short-and long-term outlook for Montana's and the West's forest products industry was in demand, Likely due to the severity of the housing downturn. Information was supplied to the Montana Governor's Office, Montana's Congressional Delegation (including reports prepared specifically for Sen. Baucus), economic development

Goals for 2009-10

1. Continue the Bureau's tradition of delivering and communicating relevant research that meets the needs of its clients and partners;
2. Work with the new associate director of the BBER to help him get established and continue the BBER's successful health care research program;
3. Become more active and visible on Montana policy issues by reaching out to the media and interested public through traditional and internet media;
4. Continue to transition staff into new leadership roles in key BBER functional areas.

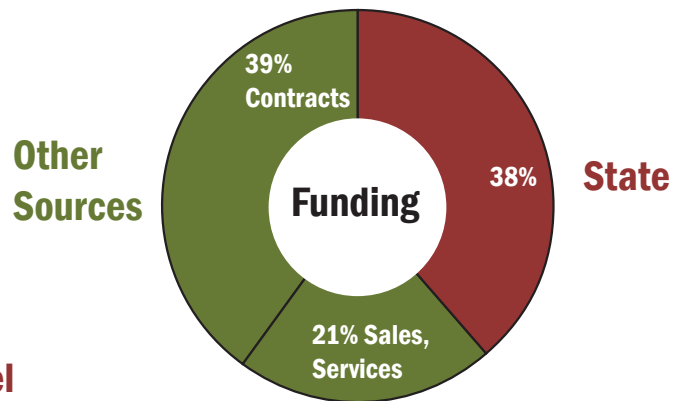
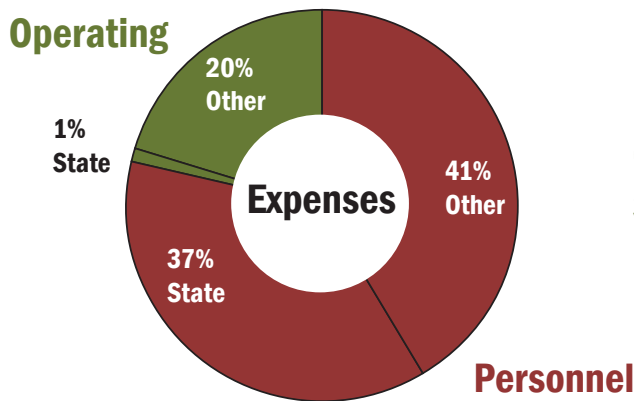
- groups, conservation and environmental groups, forest industry mangers, industry trade associations, the Federal Reserve Bank in Minneapolis, federal and state agencies, the U.S. Dept. of Commerce, the Economic Development Administration, and news agencies including the New York Times;
- Information on the potential for woody biomass energy from forests in Montana and the other Western states was supplied to economic development groups, federal and state agencies, the National Center for Appropriate Technology, forest industry mangers, university and agency researchers.

This was also a year that saw considerable activity in the BBER's Montana Kids Count program, culminating in a county-level data publication that was especially well received. With the support of public and private sector sponsors, the Bureau launched a new initiative aimed at increasing the awareness and involvement of employers in early childhood development issues.

As we enter the new year, the Bureau is very well positioned to grow and thrive in the face of a challenging economic environment. With the addition of Gregg Davis as the health care director, the BBER's senior positions are now filled, which is especially fortunate in light of the fast moving developments in health care. We are also delighted to have retained the wisdom and experience of long-time Bureau leaders Paul Polzin, Chuck Keegan, and Steve Seninger, all of whom remain active in our ongoing projects.

The BBER remained at about the same level of funding and expenditures in 2008-09, despite the new constraints imposed on some client's research budgets due to the recession. State support again represented 38 percent of the total budget last year, making possible the Bureau's public outreach, forecasting and other services for the Legislature conducted over the year. Operating expenses were impacted primarily by higher travel costs. The Bureau is fully staffed heading into 2009-10, with office space representing a significant limiting factor for future growth.

	2007-2008		2008-2009	
Total Funding	\$1,268,932	100%	\$1,290,882	100%
State funds	\$466,990	37%	\$485,668	38%
Other sources	\$801,942	63%	\$805,215	62%
Contract research	\$620,678	49%	\$498,679	39%
Sales and service, gifts	\$180,965	14%	\$274,516	21%
Total Expenditures	\$1,268,932	100%	\$1,290,882	100%
Personnel services	\$1,046,261	82%	\$1,004,160	78%
State funds	\$460,106	36%	\$478,921	37%
Other sources	\$586,155	45%	\$525,239	41%
Operating expenses	\$222,671	18%	\$259,485	20%
State funds	\$6,884	1%	\$6,746	1%
Other sources	\$215,787	17%	\$252,739	20%



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. It looks at major industries and their impact on the economy and keeps 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 frequently cited by the Bureau in public appearances.

Manufacturing and Forest Products

This has been a year of ongoing changes and challenges for the **Forest Industry Research Program**. This was Todd Morgan's first year going on the Outlook Seminars, and his perspective was an excellent addition to the program. Three of the program's most recent hires left in February and March 2009. Ben Super took a position with DNRC, and Jon and Katie Songster moved to Pennsylvania to be close to family and attend nursing school. We hired Steve Robertson in May and Steve Hayes in June to keep our staffing and projects on course. Steve R. and Steve H. come to BBER with a great deal of research and practical forestry experience.

The program has continued to work closely with the **USDA Forest Service's Forest Inventory and Analysis Program**, and will remain 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 12 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 during the current recession. Demand for our information and analytical services, in general, seems to have grown over the past year, and particularly among these emerging themes/areas of interest.

Survey Research

This 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 2008-09, 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 cellphone 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.

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.

This year marked a change in leadership for Montana KIDS COUNT as Daphne Herling became the director and continued to mentor two bureau staff members, Julie Ehlers and Thale Dillon, into leadership roles in the program. Thale Dillon works as the senior research analyst and Julie Ehlers is the director of communications.

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 34th annual **2009 Montana Economic Outlook Seminars** increased overall, reaching a new high at 1,442 registrations. This accounted for a 5 percent increase over 2008. The Bureau also travelled to eastern Montana to present the full seminar to Sidney and Miles City. Forty people attended the seminar in Miles City, and 31 attended in Sidney. The conference theme focused on transportation issues, with a special presentation by the director of the Western Transportation Institute at Montana State University, Steve Albert. The corresponding booklet that accompa-

nies the Outlook Seminar and features data and articles regarding the speaker's presentations received an outstanding achievement award from the Association of University Bureaus of Economic Research (AUBER) this year and was awarded the Excellence in Publications Award.

In the summer of 2008 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 a presentation in Billings 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 received an outstanding achievement award from AUBER earning the Award of Excellence in Publications.

The Bureau's Web site, 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 Web site also allows visitors to subscribe to the MBQ, correspond with Bureau employees, and register for the Economic Outlook Seminars. This year we started the transition of updating the Bureau's Web site by doing a design overhaul. The launch of the new site took place in August 2009.

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 Web site 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,

Bureau Programs

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 including chairs of the Ethics and Communications Committees; 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 Epidemiologi-

cal Workgroup; Montana Council for Maternal and Child Health; Montana School Readiness Task Force.

During FY 2008-09, Bureau personnel made numerous speeches and presentations to various meetings and 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 -

Garth N. Kallevig

Stockmans Bank
Sidney, MT

Myles J. Watts

MSU Agricultural Economics
& Economics Dept.
Bozeman, MT

Dan Villa

Office of the Governor
Helena, MT

Barbara Stiffarm

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Dick King

Missoula Area Economic
Development Association
Missoula, MT

David G. Gates

NorthWestern Energy
Butte, MT

Todd Younkin

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

Larry White

UM School of Public &
Community Health Sciences
Missoula, MT

Contract Research in 2008-09

Economic Analysis

The Available Labor Supply in Montana's Labor Markets. Sponsored by the Montana Department of Labor and Industry. A statewide assessment of labor supply, with detailed results for five state sub-regions as well as the American Indian population, both within and outside the state's reservations.

The Available Labor Supply in the Flathead County Labor Market. Sponsored by Montana West Development Corporation. An assessment of the working and non-working adult population in Flathead who would be willing to consider new job opportunities.

Labor Market Availability in North Central Montana. Sponsored by Opportunity Link, Inc. A similar labor market assessment for the 11-county region served by Opportunity Link. Included results for the three American Indian Reservations contained in the region.

Housing Affordability and Montana's Real Estate Markets. Sponsored by Montana Association of Realtors and Montana Building Industry Association. An analysis of the factors affecting housing costs, both rental and owner-occupied, in seven major real estate markets in Montana. The study also presented an assessment of affordability by comparing median home prices to median income.

Forest Products and Manufacturing Research

Region One Logging Costs. A challenge cost share agreement with the USDA Forest Service, Region One, Missoula, MT, to conduct an analysis of logging 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.

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.

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.

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.

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.

Alaska, California, and Oregon Forest Industry 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, Oregon, and California by examining trends in products, industry structure, source of supply, and employment.

Inland Northwest Forest Products Research Consortium 2005. 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.

Analysis of the Wood Products Industry's Capacity to Utilize Timber. A challenge cost-share agreement with the USDA Forest Service, Inventory and Monitoring Institute, Missoula, MT, to estimate Region One's forest products industry's capability to utilize and adjust to a changing raw material supply.

Montana Manufacturing Extension Center Economic Report. An economic survey and report of Montana's manufacturing firms sponsored by Montana State University's Montana Manufacturing Extension Center.

Survey Research

Survey of Community Attitudes to Wildfire Management in Flathead County, Montana. A survey administered for The University of Montana's College of Forestry and Conservation to learn how the public wants wildfire managed.

Montana Tranplan21 Public Involvement Survey. A survey administered for Montana Department of Transportation examining public satisfaction with and preferences about Montana's transportation system.

Montana Tranplan21 Stakeholder Survey. A survey administered for Montana Department of Transportation examining transportation interest group satisfaction with and preferences about Montana's transportation system.

Survey of Federal Government Agency Firefighters' Attitudes to Wildfire Management in the United States. A survey administered for the USDA Forest Service's Rocky Mountain Research Station to learn how government agency firefighters want wildfire managed.

Montana Seatbelt Use Survey. A survey administered for Montana Department of Transportation examining public attitudes toward seatbelt use in Montana.

Montana Gambling Establishment Survey. A survey administered for the Montana Gaming Research and Education Fund to measure the economic impact of gambling establishments on the Montana economy.

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

Supply Chain Managers Survey. A questionnaire developed for the Association of Operations (APICS) management that explores the possibility of developing national and international leading economic indicators.

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.

Child and Teen Death Rates from Motor Vehicle Crashes. A collaborative project with South Dakota Kids Count to analysis the incidence and factors contributing to the states child and teen death rates from motor vehicle crashes.

Economic Analysis of Montana EITC Program. An analysis to examine the costs associated with expanding the federal Earned Income Tax Credit program to Montana.

Publications completed in 2008-09

Economic Analysis

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

Barkey, P.M., "Expanding Health Insurance Coverage" *Montana Business Quarterly*, Vol. 47, No.1., Spring 2009

Barkey, P.M., "Bailouts and Meltdowns: What's Ahead for Montana's Economy?" *Montana Business Quarterly*, Vol. 46, No.3., Autumn 2008

Polzin, P.E., "Feeling the Credit Crunch?" *Montana Business Quarterly*, Vol.46, No.3., Autumn 2008

Polzin, P.E., "Recession: How Long and How Deep?" *Montana Business Quarterly*, Vol.47, No.1., Spring 2009

Polzin, P.E., "The Montana Outlook" *Montana Business Quarterly*, Vol.47, No.1., Spring 2009

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Brandt, J.P., T.A. Morgan, M.T. Thompson. (In press) Wyoming's Forest Products Industry and Timber Harvest, 2005. *Resour. Bull. RMRS-RB-XXX*. Fort Collins, CO: U.S. Department of Agriculture, Forest Service, Rocky Mountain Research Station. XXp.

Brandt, J.P. and T.A. Morgan. 2008. Oregon's Primary Forest Products Industry. In: Donnegan, J., S. Campbell, D. Azuma, tech. eds. 2009. Oregon's forest resources, 2001-2005: five-year Forest Inventory and Analysis report. Gen. Tech. Rep. PNW-GTR-765. Portland, OR: USDA, Forest Service, Pacific Northwest Research Station. 186p.

Morgan, T.A. and J.P. Brandt. 2008. Removals for Timber Products. In: Donnegan, J., S. Campbell, D. Azuma, tech. eds. 2009. Oregon's Forest Resources, 2001-2005: Five-Year Forest Inventory and Analysis Report. Gen. Tech. Rep. PNW-GTR-765. Portland, OR: USDA, Forest Service, Pacific Northwest Research Station. 186p.

Halbrook, Jeff M.; Morgan, Todd A.; Brandt, Jason P.; Keegan, Charles E., III; Dillon, Thale; Barrett, Tara M. 2009. Alaska's Timber Harvest and Forest Products Industry, 2005. Gen. Tech. Rep. PNW-GTR-787. Portland, OR: U.S. Department of Agriculture, Forest Service, Pacific Northwest Research Station. 30 p.

Brandt, J.P., T.A. Morgan, C.E. Keegan, F.G. Wagner, and S.R. Shook. (2009). Idaho's Wood Products Industry: Current Conditions and Forecast, 2009, Station Bulletin 92, Moscow, Idaho: Idaho Forest, Wildlife and Range Experiment Station, 4p.

Jones, G., and J. Brandt. 2009. Forest Products Industry in Mineral County – Mineral County Challenge: Positioning for Prosperity in the Changing West, Mineral County Challenge Brochure, June 6. 11p.

Morgan, T.A., C.E. Keegan, and J.P. Brandt. 2009. Montana's Manufacturing Industry. *Montana Business Quarterly*, Vol 47, No. 1. 32-34.

Healey, S.P., T.A. Morgan, J.M. Songster, and J.P. Brandt. 2009. Determining Landscape-Level Carbon Emissions from Historically Harvested Forest Products. In: McWilliams, Will; Moisen, Gretchen; Czaplowski, Ray, comps. 2009. 2008 Forest Inventory and Analysis (FIA) Symposium; October 21-23, 2008; Park City, UT. Proc. RMRS-P-56CD. Fort Collins, CO: U.S. Department of Agriculture, Forest Service, Rocky Mountain Research Station. 1 CD.

Morgan, T.A., T. Johnson and R. Piva. 2009. Removals, Timber Products, and Residues. In: Smith, W.B., P.D. Miles, C.H. Perry and S.A. Pugh, coord. 2009. Forest Resources of the United States, 2007. Gen. Tech. Rep. WO-78. Washington, DC: USDA, Forest Service, Washington Office. 336p.

Morgan, T.A. and C.E. Keegan. 2008. California's Primary Forest Products Industry. In: Christensen, G.A., S.J. Campbell, J.S. Fried, tech. eds. 2009. California's Forest Resources, 2001-2005: five-year Forest Inventory and Analysis report. Gen. Tech. Rep. PNW-GTR-763. Portland, OR: USDA, Forest Service, Pacific Northwest Research Station. 183p.

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

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

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Health Care and Social Policy Research

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Dillon, T., "Are Montana Roads Becoming Safer? Traffic Safety and Other Findings from Montana Kids Count." *Montana Business Quarterly*, Vol. 46, No.4, Winter 2008.

Dillon, T., Herling, D., Cochran, C., " Motor Vehicle Death Rates: Rural Highways and Drinking and Driving Put Montana Teens at Higher Risk than Other States." *Montana Business Quarterly*. Vol.46., No. 4, Winter 2008.

Barkey, P.M., "Expanding Health Insurance Coverage" *Montana Business Quarterly*, Vol. 47, No.1. Spring 2009.

Timeline

1950s

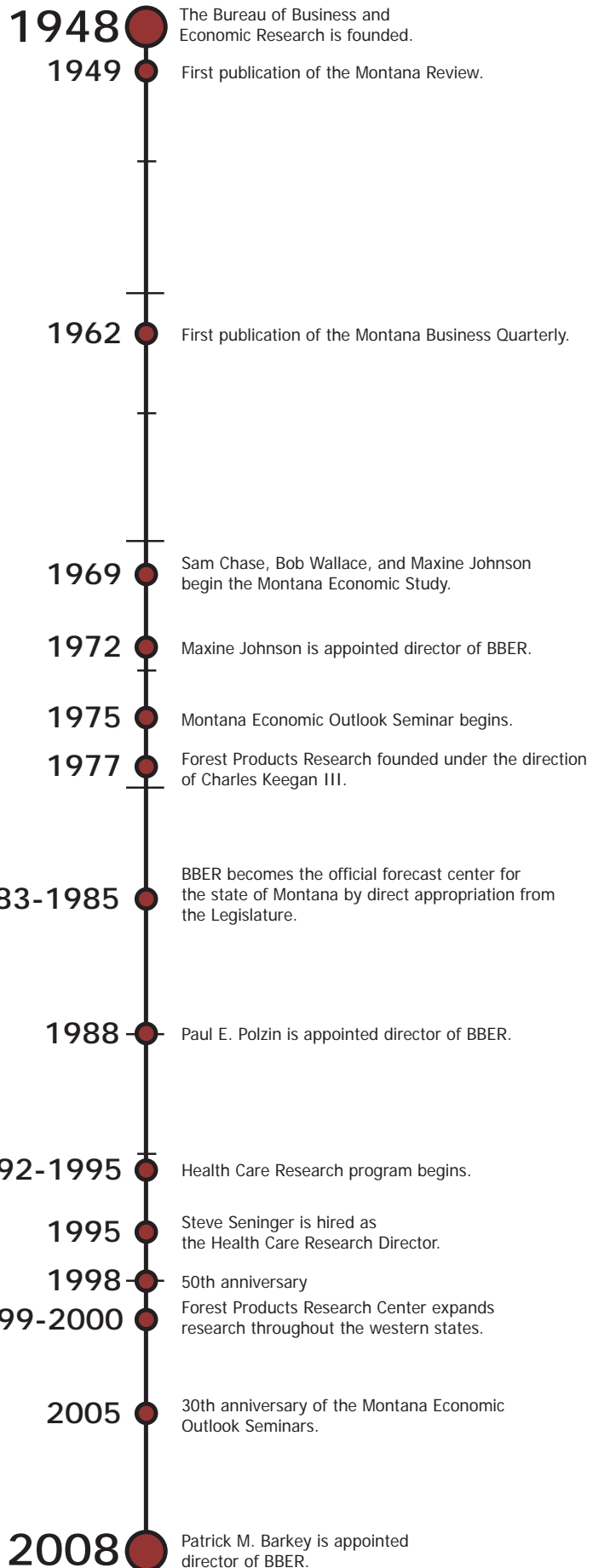
The Economy of Montana begins publication - Montana's most comprehensive resource for state data and economic information at the time.

1980-1985

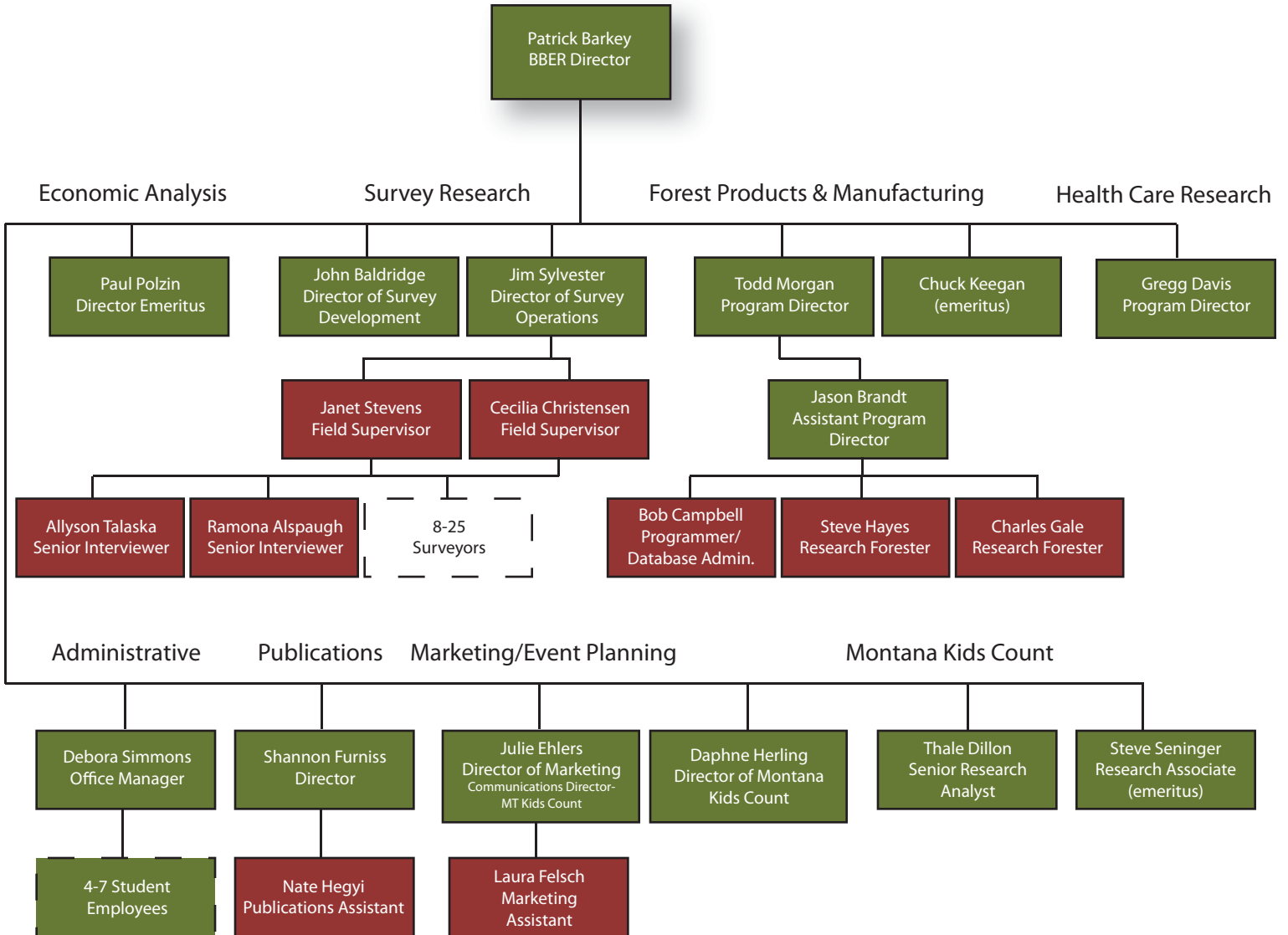
Montana Poll begins - a quarterly public opinion poll conducted by the BBER survey research department

1995-2000

The Bureau partners with the Montana Manufacturing Extension Center, the Department of Agricultural Economics at Montana State University, and the Institute for Tourism and Recreational Research to expand the program of the Montana Economic Outlook Seminars.



Organizational Chart



Effective Date: 10/30/2009

