

2008



Bureau of Business and Economic Research Annual Report FY 2007-08



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BUREAU OF
BUSINESS
AND ECONOMIC
RESEARCH



About the Bureau

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; publishes the award-winning Montana Business Quarterly.

Letter from the Director

Thanks in advance for taking the time to look over this 2007-08 annual report of the Bureau of Business and Economic Research at The University of Montana. I hope you will agree as you look over these pages that the BBER's talented staff has again made a significant contribution to our knowledge and understanding of the Montana economy in the past 12 months.

The Bureau has grown to become one of the most trusted, sought-after sources of information and expertise - not just on the overall economy, but the individual industries, regions, and peoples that make it tick. And it's my new job to try to keep it that way. With the retirement of Paul Polzin in June 2008, the BBER has a new director in place for just the third time in the past 45 years. In fact, the past three years have seen turnover of all of three Bureau's senior staff positions.

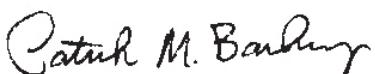
But that talent and experience isn't quite walking out the door. Paul Polzin remains active as a key speaker in the 2009 Economic Outlook Seminars, and as this report bears out, Chuck Keegan and Steve Seninger remain active in forest products and health care research, respectively. Their insights and wisdom are very much appreciated by those struggling to fill their roles.

We begin the new year with excitement and anticipation for the challenges and opportunities ahead of us. There is a little less optimism these days for the economy itself. As these words are written, the U.S. economy appears to be in recession, and many of the favorable trends that have helped Montana's growth engine run even faster than the nation are beginning to falter as well.

That just makes the job of gathering the best information, providing solid analysis and communicating results and findings to decision makers more important than ever. We plan to be very busy at the BBER in this coming year serving our clients and the public with the high quality research and publications you've come to expect. If you or your organization have a question or an information need 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.

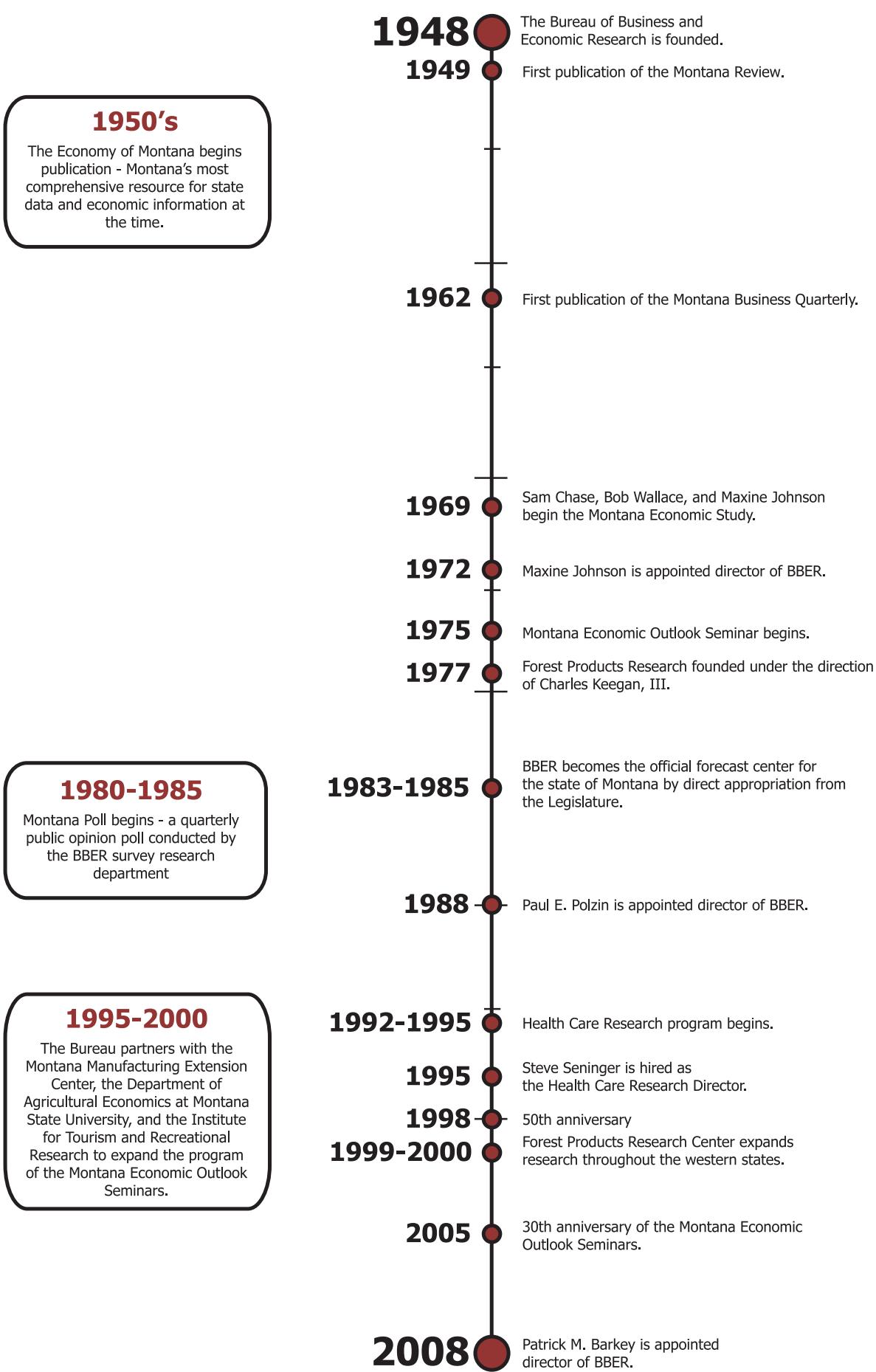
Sincerely,



Patrick M. Barkey
Director
Bureau of Business and Economic Research, and
Associate Professor,
Management and Marketing

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.



The Year in Review

It's been another outstanding year for the Bureau of Business and Economic Research. Outlook Seminar attendance was at an all-time high, thanks to a timely and outstanding program, as well as our continued efforts to improve and expand marketing. Bureau researchers completed a number of high profile studies in 2007-08, in manufacturing, housing and real estate, transportation, forest products, and substance abuse. And our award-winning publications continued to shed light on issues including child welfare, the economic status of American Indian reservations, and the impact of the national economic slowdown on communities in Montana.

Among the BBER's noteworthy accomplishments for 2007-08 were:

- An all-time high of 1,371 registrations for the 33rd annual Economic Outlook Seminars held in nine Montana cities in January-March, up 15 percent from the previous year;
- Dr. Sheila Stearns, commissioner of higher education, delivered the keynote address for the 2009 Economic Outlook program on the "New ICE Age," addressing the critical importance of the educational system in sustaining a productive workforce;
- The BBER continued its role in gathering the most timely, accurate, and comprehensive information regarding the state economy through its participation in the statewide labor availability study, addressing the quantity and quality of skilled workers in communities around

the state (sponsored by the Montana Department of Labor and Industry);

- 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;
- The Bureau's key role in state level policy decisions was continued as Steve Seninger, BBER director of economic analysis, was called on to provide cost projections for the ultimately successful ballot proposal to expand state-funded children's health insurance;
- Todd Morgan, formerly associate director, assumed the role of director of forest products research, succeeding Charles Keegan after 31 years of leadership. The forest products research program continued its high visibility role in analyzing and assessing the wood products industry throughout the western United States, adding several research foresters and garnering significant new funding.

The 2009 Economic Outlook Seminar will mark the second year of our transition from exclusive sponsorship to the current situation with multiple sponsors. The response from the business community around the state has been encouraging, and we now have a flexible array of sponsorship and support levels that can accommodate both local and statewide marketing strategies.

2007-08 marked the first year for BBER survey research's implementation of

sampling strategies that targeted cell phone-only households. The results have been both interesting and valuable. We will strongly encourage future clients using telephone-based surveys to include a cell phone component to the sample, particularly for single and younger households.

Perhaps the most important event of the 2007-08 year for the Bureau was the retirement of Paul Polzin, Director since 1986 and a part of the BBER since coming to Montana in 1968. As part of the Economic Outlook Seminars for 33 consecutive years, and as a leader who supported or recruited most of the current BBER staff, Paul has been the “face” of the Bureau for several generations of Montana business and political leaders. He remains at the BBER on a part-time basis, and will continue to take a lead role in the Economic Outlook Seminars.

In his place, Patrick Barkey, who came aboard as director of health care research in April 2007, assumed the role of BBER director.

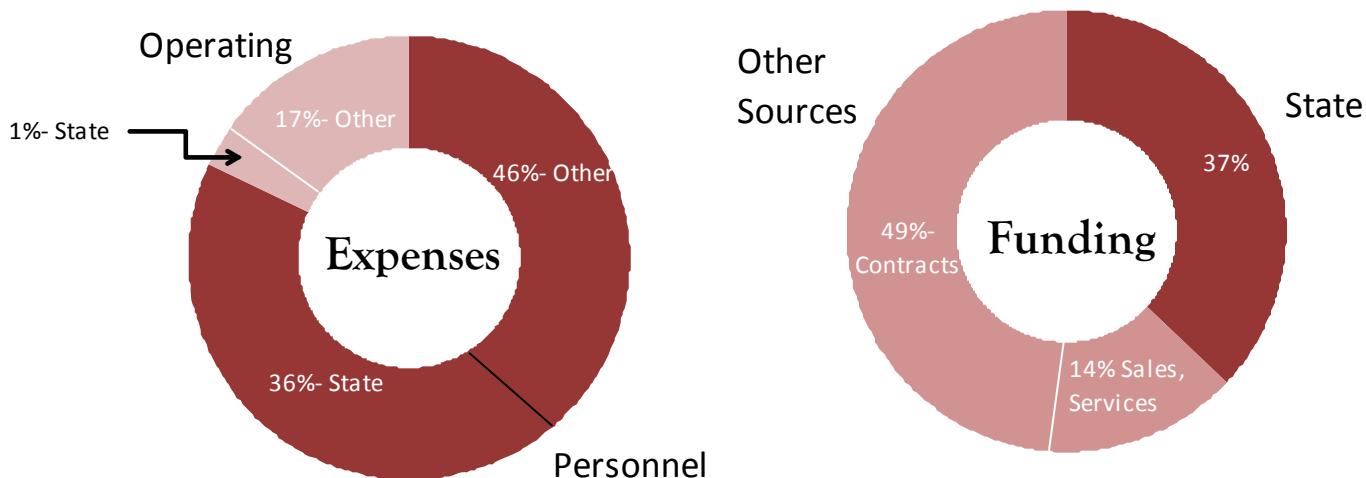
Goals for 2007-08

1. Continue to further the Bureau’s mission by working with the administration and the Legislature to assess and project the impacts of the national economic downturn on the Montana economy;
2. Hire a new associate director of the BBER who can take over the Bureau’s successful Health Care Research program;
3. Build on the BBER’s nationally recognized strengths in communications and effective publications by making more use of electronic media to disseminate research results and;
4. Continue to transition staff into new leadership roles in key BBER functional areas.

Finances

BBER funding has fluctuated along a mild upward trend for the past five years, and 2007-08 was no exception. Funding from contracts and grants was down slightly in comparison to 2006-07, due to some softness in survey research, but the dip was within normal historical experience. State-appropriated funds made up 37 percent of total revenues in 2007-08, and they remain crucial for supporting public outreach and services for the Legislature and state government agencies. During 2007-08 the BBER was fully staffed, with space being an important limitation for future growth.

	2006-07		2007-08	
<u>Total Funding</u>	\$1,472,814	100%	\$1,268,932	100%
State funds	\$442,474	30%	\$466,990	37%
Other sources	\$1,030,340	70%	\$801,942	63%
Contract research	\$819,299	56%	\$620,678	49%
Sales and service, gifts	\$211,041	14%	\$180,965	14%
<u>Total Expenditures</u>	\$1,472,814	100%	\$1,268,932	100%
Personnel services	\$1,208,329	82%	\$1,046,261	82%
State funds	\$434,588	30%	\$460,106	36%
Other sources	\$773,741	53%	\$586,155	46%
Operating expenses	\$264,485	18%	\$222,671	18%
State funds	\$7,886	1%	\$6,884	1%
Other sources	\$256,599	17%	\$215,787	17%



Bureau Programs

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 transition, with several challenges and significant accomplishments for the Forest Industry Research Program. The year began with transitions in program leadership as Charles Keegan retired at the end of August 2007, Todd Morgan was appointed program director on September 1, and Jason Brandt was promoted to program assistant director September 15.

The program also faced a staffing challenge this year, with forest researchers Al Chase, Sean McMullin, Tim Spoelma, and Jeff Halbrook pursuing career opportunities elsewhere. However, in July, Bob Campbell returned as our programmer/database administrator. In October, Jon and Katie Songster were recruited as research forester and research associate, respectively, and Ben Super came aboard as a

research forester in May.

Fully staffed with very competent and eager individuals, eight active and funded research projects ongoing, and several new projects pending, the program is thriving. The program successfully competed for and was awarded a Joint Fire Sciences Program research grant, 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.

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 2007-08, 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.

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 former director Steve Seninger retired and the program's director of community outreach, Daphne Herling, became the director. In addition, two bureau staff members transitioned to work on Kids Count including Thale Dillon as the senior research analyst and Julie Ehlers as 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 33rd annual 2008 Montana Economic Outlook Seminars increased overall reaching a new high at 1,371 registrations. This accounted for a 15 percent increase over 2007. The Bureau also traveled to the High Line and presented the full program for the first time in Havre and Lewistown. Fifty-two people attended the seminar in Havre, and 41 attended in Lewistown. The conference theme focused on workforce issues in Montana, with a special

presentation by Montana's Commissioner of Higher Education Sheila Stearns.

This summer we continued to partner with the Montana Chamber of Commerce to offer a summer outlook program in Whitefish to business professionals at the Montana Governor's Cup annual event. This mid-year 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.

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.

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, including chairs of the Ethics and Communications Committees; Forest Products Society; Society of American Foresters Philosophy and History Working Group; Forest Inventory and Analysis (FIA) Ownership Team; Forest Products Society, Forest Products Society reviewer; Forest Products Journal reviewer; and, Society of American Foresters reviewer.

During FY 2007-08, 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.

Contract Research in 2007-08

Economic Analysis

Alternative Data Sources to Estimate Change In Housing Stock. Contract with the US Census Bureau investigating alternative data sources for producing housing unit-based population estimates.

Missoula County Real Estate Report. Contributor of demographic and economic conditions.

Analysis of Revenue Sources to Montana Reservations. A project for the Montana Department of Commerce examining the economic contributions of Montana's tribes to the state.

Economic Survey and Report of Manufacturing in Montana. A report for the Montana Manufacturing Extension Center detailing manufacturing as a piece of Montana's economy.

The Economic Impact of Wild Horse Border Crossing Upgrades, A project sponsored by Bear Paw Development Corporation to assess the expansion of the Wild Horse Border crossing near Havre, Montana.

The Operations Supply Index: Report on Initial Development, May 2008. Sponsored by The Association for Operations Management (APICS) regarding a proposal to create a leading indicator related to corporate logistics.

North Central Montana Labor Availability Survey, ongoing. A survey of labor availability in seven counties and three reservations in north central Montana. Sponsored by Opportunity Link.

Montana Housing Affordability Study, ongoing. A study of factors affecting demand and supply for residential housing in seven markets within Montana. Sponsored by the Montana Association of Realtors and the Montana Building Industry Association.

Forest Products and Manufacturing Research

Alaska, California, and Oregon Forest Industry Analysis. A cooperative research agreement with the U.S.D.A. 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.

On-going Timber Product Output, Removal, and Forest Industry Analysis for the Interior West States. A cooperative research agreement with the U.S.D.A. 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.

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

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.

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.

Inland Northwest Forest Products Research Consortium 2004, 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 U.S.D.A. 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 U.S.D.A. 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.

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

Survey Research

Flathead County Labor Market Availability, ongoing. Sponsored by Montana West Economic Development. A survey of labor availability in Flathead County.

WIRED Montana Labor Market Availability Labor Market Survey (n=5600). A survey describing the number of Montanan's available for work. Sponsored by the Montana Department of Labor and Industry.

Fire Decisions Survey (n=669). Survey of federal employees working on fire crews evaluating the decision making process for the US Forest Service Rocky Mountain Research Station.

2007 MDT Motor Carriers Survey (n=442). Survey of trucking company managers regarding Montana transportation issues.

Missoula Community Development Corporation Wage and Benefit Survey (n=1025). Survey of Missoula-Ravalli County businesses.

MDT Seatbelts (n=819 landline and n=129 cell). Survey for Montana Department of Transportation on attitudes toward seatbelt usage.

Missoula Long Range Transportation Plan (n=430). Survey for Missoula County

University of Montana Student Southern Route Pilot Survey (n=506). Internet survey of University of Montana students

Survey of Montana Gaming Establishments (n=447). Survey of Montana gambling establishments.

Supply Chain Managers Survey (in pilot phase). Survey of corporate logistics specialists that explores the possibility of developing leading economic indicators.

Montana Poll (n=436). Quarterly survey of adult Montanans on various subjects including consumer sentiment, migration status and motivation, computer ownership and use, health insurance status, and food security.

Health Care and Public Policy Research

2006 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

The Economic Cost of Alcohol and Drug Abuse in Montana. Project to examine the impact of alcohol and drugs, generally, and with special emphasis on specific drinking behaviors and special populations, on the Montana economy.

Early Childhood Comprehensive System Planning and Implementation. Montana is in its fifth 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.
Expanding Health Care Coverage for Montana's Uninsured Children. Project to research all initiatives focused on the expansion of health insurance to Montana's children, develop state budget cost estimates in collaboration with state government agencies, and present findings to inform public discussion of alternative ways to increase children's health insurance coverage in the state.

Publications completed in 2007-08

Economic Analysis

- Barkey, P.M., 2007. Montana Manufacturing: Bucking the National Trend." Montana Business Quarterly, Vol. 45, No. 4.
- Polzin, P.E., 2008. "One Shock, Two Shocks, Three Shocks. A Recession?" Montana Business Quarterly, Vol. 46, No.1
- Polzin, P.E., 2008. "The Montana Economy Zooms Along." Montana Business Quarterly, Vol. 46, No.1
- Polzin, P.E., 2007. "Montana's Montana Economy Still Strong despite National economic Downturn." Montana Business Quarterly, Vol. 46, No.2

Forest Products and Manufacturing Research

- Brandt, J.P., J.M. Halbrook and T.A. Morgan. (In revision). "Montana's Log Home Industry." Journal of Forestry.
- Spoelma, T.P., T.A. Morgan, T. Dillon, A.L. Chase, C.E. Keegan, L.T. DeBlander. 2008. "Montana's Forest Products Industry and Timber Harvest, 2004." Resour. Bull. RMRS-RB-8. Fort Collins, CO: U.S. Department of Agriculture, Forest Service, Rocky Mountain Research Station. 36 p.
- Morgan, T.A. and T.P. Spoelma. 2008. "California logging utilization, 2004." Western Journal of Applied Forestry 23 (1).
- Carroll, M.S., K.A. Blatner, P.J. Cohn and T.A. Morgan. 2007. "Managing Fire Danger in the Forests of the U.S. Inland Northwest: A Classic "Wicked Problem" in Public Land Policy." Journal of Forestry 105 (5).
- Brandt, J.P., T.A. Morgan, C.E. Keegan, F.G. Wagner, and S.R. Shook. (2008). "Idaho's Wood Products Industry: Current Conditions and Forecast, 2008." Station Bulletin 89, Moscow, Idaho: Idaho Forest, Wildlife and Range Experiment Station, 4p.
- Brandt, J.P. (2008). "Montana's Log and Lumber Market Outlook, 2008." Montana Tree Farm News, No.33.
- Keegan, C.E. and J.P. Brandt. (2008). "Montana's Manufacturing Industry." Montana Business Quarterly, Vol. 46, No.1.
- Morgan, T.A., C.E. Keegan, and J.P. Brandt. (2008). "Montana's Forest Products Industry, Current Conditions and 2008 Forecast." Montana Business Quarterly, Vol. 46, No.1.
- Keegan, C.E. and T.A. Morgan. (2007). "Montana's Forest Products Industry in Transition." Western Montana in Business Monthly, August 2007, Vol. 5, No. 8

Survey Research

- Baldridge, J and Donohue, J., "Cutting the Cord: Households Dropping Land Lines for Cell Phones." Montana Business Quarterly, Vol. 46, No. 2.
- Sylvester, J.T., "Sub-County Population Estimates: New Methods Needed to Provide More Accurate Data". Montana Business Quarterly, Vol.45, No. 4.

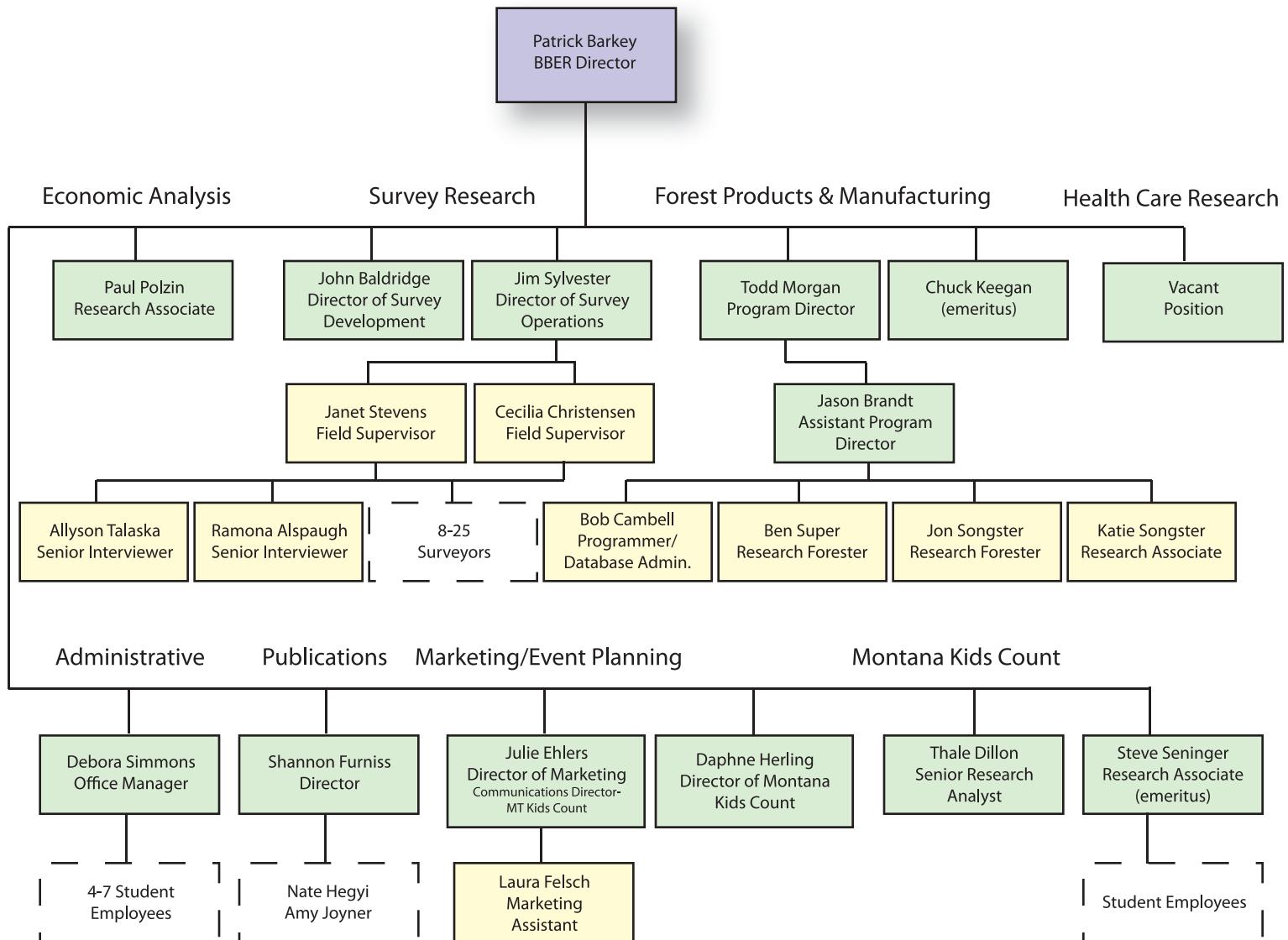
Health Care and Social Policy Research

- Dillon, T., Ehlers, J.L., Herling, D., "Substance Abuse: Montana Rates Higher than National Average." Montana Business Quarterly, Vol. 45, No. 4.

Seninger, S., "Economic Returns for Investing in Children's Health." Montana Business Quarterly, Vol. 46, No.2.

Dillon, T., Rinki, C., Giroux, J., "Reclaiming American Indian Maternal and Infant Health." Montana Business Quarterly, Vol. 46, No.2.

Barkey, P.M., "Challenges Ahead for Health Care Finance." Montana Business Quarterly, Vol. 46, No.1.



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