

**BUREAU OF
BUSINESS
AND ECONOMIC
RESEARCH**

2012 Annual Report

**Bureau of Business and Economic Research
School of Business Administration
The University of Montana – Missoula**

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The BBER Advisory Board was established in 1988 to forge a closer link between the staff and director of the Bureau and its stakeholders across Montana. The advisory board meets semi-annually and consists of seven rotating members who serve a three-year term. Advisory board alumni include more than 50 respected leaders from the public and private sector, and BBER has benefited greatly from their insight and expertise.

BBER Advisory Board members:

- serve as a vital sounding board for policy decisions,
- share information about their respective geographic areas,
- alert BBER staff to economic trends, and,
- identify potential research and outreach opportunities.

DIRECTOR'S LETTER



Decisions, decisions. As these words are written, Montanans are going to the polls and making decisions on who we want to lead us at all levels of government. But whatever the outcome of those contests, you can bet that election-night celebrations of the winners will be short-lived. That's because the number of serious, pressing problems requiring decisions by our newly-elected leaders is truly daunting.

Should Montana extend Medicaid coverage to cover more uninsured? Should coal be developed? How will we fix the problem of public pensions? Is biomass an economically and environmentally feasible energy source? And, of course, how and when should the federal government close its huge budget deficits? Most of us have heard these "headline" issues. But dig just a little deeper and you'll find many more.

And they all have this in common. They all benefit from better information. The Bureau's mission has always been doing precisely that – providing better information to decision-makers. And perhaps that's why we're busier than ever before.

As you'll read in these pages, BBER research projects have yielded a treasure trove of information on issues from health insurance to fire safety. We're especially proud of our survey research. Because our focus is Montana, we think our survey-based estimates of things like the number of Montanans who lack health insurance or how many employers plan to drop their group health insurance plans are more reliable than national surveys.

The pressing nature of so many public policy issues has kept us busy in another way as well – attendance at our Economic Outlook Seminars has risen sharply. Our total attendance for the 2012 seminar, entitled "Montana's New Energy Frontier: What are the Prospects?" was up 30 percent, an astounding increase for a 37-year-old event. We're working hard on topping that for the upcoming 2013 series, with a new emphasis on energy and health care in what we hope will be a solid program.

One of the great things about working at the Bureau is our delightful and dedicated staff. For the past few years we have greatly benefitted from the continued contributions of Emeritus Director Paul Polzin and forest products Director Emeritus Charles Keegan. Along with newly hired research assistants Josh Meek and Micah Scudder we've grown both in size and capabilities.

So take a look through these pages and learn a bit of what we've been up to. And if there's ever any project or service the BBER can help you with, please give me a call. Here's hoping for a great 2013 for you and your organization.

Sincerely,

A handwritten signature in black ink that reads "Patrick M. Barkey". The signature is written in a cursive, slightly slanted style.

Patrick M. Barkey
Director

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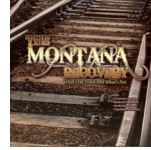
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YEAR IN REVIEW

Among the BBER's noteworthy accomplishments for 2011-12 are:

- Conducting a comprehensive, survey-based assessment of the health insurance status of Montana households, including detail on the costs and coverage of the various plans. These data have enabled BBER researchers to assess the likely impact of health insurance exchanges set up as part of the U.S. Affordable Care Act on Montana's uninsured and insured populations.
- Setting up the state's first all payer claims database that will ultimately allow Montana health care consumers to see prices and other relevant information online.
- Continuing to conduct the increasingly popular Montana Economic Outlook Seminars across nine cities, in cooperation with Montana State University–Bozeman and MSU–Billings. The 2012 program, featuring Montana Oil and Gas Board chief administrator **Tom Richmond** as keynote speaker, saw a remarkable 30 percent rise in total attendance from the previous year.
- Winning a grant, in partnership with a consortium of three other Northwest universities, to conduct a \$40 million project to address the economic viability of producing wood-based jet fuel as an alternative to petroleum-based fuels.

GOALS FOR 2012-13

1. Explore the opportunities for strategic growth in the areas of health care and energy/natural resources;
 2. Work with the newly elected Legislature and administration to serve as a resource for advice and information on issues pertaining to the state and local economies;
 3. Continue to nurture and integrate our newest staff members; and
 4. Grow professionally and raise our profile in national and regional organizations.
- Studying the impacts of several large scale energy development projects on the state economy, including the Otter Creek mine proposed by Arch Coal in Powder River County.
 - Bringing home three national awards for excellence in publications from the Association for University Business and Economic Research annual conference in Indianapolis.
 - Welcoming home Director of Survey Development **John Baldridge** from his recent tour in Afghanistan, where he served as a Command Sergeant Major for the U.S. Army.

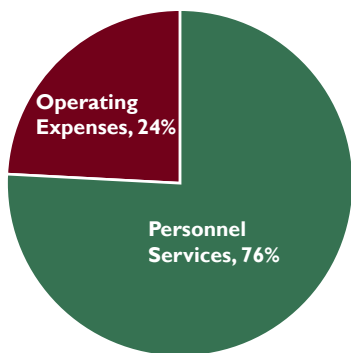
FINANCES

Bureau activity levels were largely unchanged in 2011-12 from their high levels of 2010-11. Contract research funding grew to more than \$1.1 million, representing 60 percent of total revenues. The more volatile nature of other revenues,

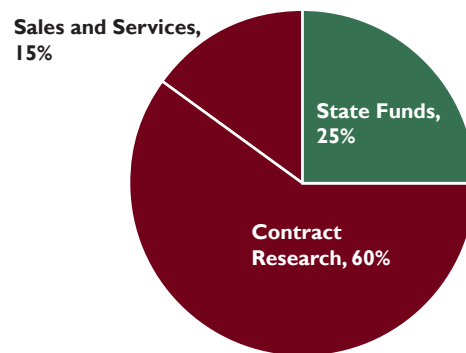
as well as operating expenses, largely reflects fluctuations in the number of and attendance at BBER events. State funds now comprise 25 percent of total BBER revenues.

	2010-11		2011-12	
Total Revenue	1,948,960	100%	1,916,249	100%
State Funds	509,624	26%	472,885	25%
Other Sources	1,439,336	74%	1,443,363	75%
Contract Research	1,096,856	56%	1,144,947	60%
Sales and Services	339,677	17%	298,416	15%
Total Expenses	1,948,960	100%	1,916,249	100%
Personnel Services	1,533,566	79%	1,452,925	76%
State Funds	499,629	26%	464,280	25%
Other Sources	1,033,937	53%	988,015	52%
Operating Expenses	412,591	21%	463,953	24%
State Funds	9,995	1%	8,604	0%
Other Sources	402,596	21%	455,348	24%

Expenses, 2011-12



Revenue, 2011-12





ECONOMIC ANALYSIS

Timely Studies on Important Statewide Issues

The Bureau of Business and Economic Research monitors all aspects of Montana's economy and provides reliable forecasts and analyses to contract clients, policymakers, businesspeople, and the general public. Many resources are available free of charge at www.BBER.umt.edu.

The energy sector is gaining a high profile in Montana and will become a featured industry at the Montana Economic Outlook Seminars in 2013. In 2011-12, energy projects continued to occupy a significant share of the Bureau's work.

Director **Patrick Barkey** and BBER Director Emeritus **Paul Polzin** completed an economic impact analysis in June 2012 for Arch Coal's Otter Creek development, including the impact of development of the Tongue River Railroad. If this project comes to fruition, it would be the state's first new coal mining development in 40 years. An extension to the

BBER's major areas of analysis include:

- Forecasting
- Impact and Policy Analysis
- Industry and Labor Market Research
- Market Research and Feasibility Studies
- Program Evaluation

completed study is underway that will add an analysis of the project's impact on state and local tax revenues and develop a research publication to explain the results. (See sidebar.)

Another recently completed study analyzes the economic impact of increased coal production at an existing facility – Cloud Peak Energy's Spring Creek mine near Decker, MT – with the additional output targeted at Asian markets.

Other work completed in 2011-12 has addressed the economic contributions of federal research facilities, manufacturing, and the craft brewing industry. Patrick Barkey and Paul Polzin are also partnering with **Myles Watts** of Montana State University to conduct an econometric analysis of the effect of state and local tax policy on the telecommunications industry.

Assessing the Impact of Energy Development for Montana

BBER Uses State-of-the-Art Methods to Estimate Economic Impacts in Montana

The size and scope of planned investments to develop Montana's energy resources are large. So when BBER economists were asked to assess how some of those investments might be translated into jobs, income, output, and other measures of Montana-based economic activity, their findings were noteworthy. According to the report, "The Impact of Otter Creek Coal Development on the Montana Economy" by **Patrick Barkey** and **Paul Polzin**, construction of the Otter Creek mine proposed by Arch Coal, new rail development, and related infrastructure represents a total investment approaching \$1 billion.

During permitting and construction, if the project goes forward, it is expected to create 2,648 construction jobs in Montana in the peak building year. About 1,740 new permanent, year-round jobs would be created in the Montana economy while the mine is operating, increasing household income by \$125.4 million per year.

Statewide impacts on income for Montana households during the peak construction year would be similarly substantial, with \$103.5 million of new personal income generated. The overall state population would increase by 2,850 people and the school-aged population by more than 560 students.

Barkey and Polzin presented the findings of their Otter Creek study in a plenary session at the Montana Energy

Expo in Billings in 2012. Nearly 1,000 people attended the expo, including Senator Baucus and Congressman Rehberg. The report was well-received by the audience and featured prominently in media coverage of the event.

Research studies like these are increasingly common at the UM Bureau of Business and Economic Research. The BBER has earned a reputation statewide as the place to go for high-level impact studies. Using the powerful REMI modeling software, BBER economists have studied the impacts of several large-scale energy development projects, Montana's major hospitals, and both the University of Montana and Montana State University on the state's economy.

The capabilities of the REMI model, combined with the Bureau's expertise in survey development and data collection, have greatly improved the depth and quality of economic projections pertaining to Montana. This is particularly true in research areas where federal survey data for Montana are unavailable or inadequate.

BBER's advanced research techniques and expert analysis are especially valuable when the data must hold up in the court of law or the court of public opinion. Watch for more of these high-level studies from the Bureau in the coming year.



FOREST PRODUCTS RESEARCH

A National Source for Current Data on the Forest Industry

BBER's Forest Industry Research Program is one of the largest departments of its kind in the country, with 10 staff members and 10 active grants in 2011-12. The program's work covers the western region, monitoring forest products operations in Montana, Alaska, Arizona, California, Colorado, Idaho, New Mexico, Oregon, Utah, and Wyoming, and its research focuses on the forest industry's size, diversity, and economic impacts.

This year the forest products team added two new multi-year agreements for forest industry and biomass research. A new partner this year was the Northwest Advanced Renewables Alliance (NARA). NARA is a public-private partnership, led by scientists at Washington State University, with partners including the University of Idaho, Oregon State University, Weyerhaeuser, Plum Creek Timber, Catchlight Energy, Gevo, Boeing, Alaska Airlines, and others. NARA's research and development work in producing bio-jet fuel from wood residues is funded by a multi-year \$40 million USDA grant. (See sidebar on page 6.)

The forestry program continued its work with the USDA Forest Service's Forest Inventory and Analysis (FIA) Program at both the regional (13 western states) and national levels. Agreements with FIA involve ongoing Timber Products Output research, studying the nation's forest industry, and standardizing the entire program nationwide. These efforts 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.

The 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, despite the congressional defunding of the USDA-AFRI Wood Utilization Research network. The team is now challenged by the loss of Consortium funding (\$80,000 to \$100,000 annually) for ongoing projects of keen interest to BBER and Montanans. Specifically, we are no longer funded to produce the annual Montana Forest Industry Outlook, Montana Manufacturing Outlook, and the various quarterly reports, such as the delivered log price and forest industry statistics provided on the BBER website. Over the past 12-plus years, Consortium money had also paid for the annual forest industry outlook reports that we craft for

Idaho, and helped to maintain the MMIS. These deliverables are in high demand and require a continued and dependable funding stream to ensure production and delivery. Without external (federal) support for these important items, it will be necessary to find in-state support for this work or discontinue providing these annual outlooks, quarterly information, and databases.

Work with our long-term cooperators like FIA and the Consortium, 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 and surrounding communities. Demand for the information and analytical services developed by BBER's forestry program has been growing, particularly in these emerging areas of interest. We expect continued growth in the demand for and use of all the information and services the program provides.

Two part-time student workers joined the Forest Products Research Program in 2012, and another staff member left to pursue his forestry career out of state. Graduate student **Josh Meek** came to BBER in January 2012 through the Climate Change Internship Program and continues to serve as a research assistant. **Micah Scudder** also came on board this summer as a research assistant and is completing a Master's degree in Forestry. Research forester **Charlie Gale** bid farewell as he moved to Portland, OR.





MANUFACTURING RESEARCH

A Data Center for Montana's Manufacturing Industry

The Bureau has conducted an annual survey of Montana's largest manufacturers since 1999. The results are featured in the annual Montana Economic Outlook Seminar Outlook book and in the *Montana Business Quarterly*. In addition, a complete analysis is published in a separate report.

BBER maintains the Montana Manufacturers Information System (MMIS), a web-based database that provides detailed information about Montana manufacturers, their products,

and capabilities. MMIS was created to foster partnerships among Montana companies, attract new customers, and identify in-state suppliers. MMIS can be accessed at <http://www.mmis.umt.edu/> or via the BBER website www.BBER.umt.edu and currently contains data on more than 1,200 facilities. Firms may contact database administrator **Bob Campbell** to be added to the MMIS and update their profiles through a password-protected program.



Making Jet Fuel from Wood Waste BBER Partners with Northwest Advanced Renewables Alliance

60 billion gallons of petroleum-based fuels are burned by the world's airlines each year. Meanwhile, millions of tons of wood residue from timber harvests and beetle-killed trees goes unused, burned in slash piles, or left to create fire hazards in our Pacific Northwest forests. The BBER's Forest Industry Research Program is helping scientists determine whether they can develop ways to turn one of the region's most plentiful and underused commodities – wood waste – into jet fuel.

This year the forest products team joined the Northwest Advanced Renewables Alliance (NARA) in securing a \$40 million grant from the U.S. Department of Agriculture. Led by Washington State University, the project aims to create a sustainable industry to produce aviation biofuels and valuable co-products using forest and mill residues, construction waste, and new energy crops.

BBER's role is to evaluate logging and mill residue across the targeted four-state region – Oregon, Washington, Idaho, and Montana – including the quantity of material, its characteristics, and where it is found. The Bureau is also facilitating outreach, helping to connect researchers to community stakeholders who have economic development and environmental interests in the project and increase public literacy in bioenergy.

NARA partners include public universities, government laboratories, and private industry from throughout the Northwest and beyond. Scientists on the team are developing the chemical process of breaking the wood down into base materials which can be used to make biofuel and other chemicals like solvents for paints and renewable rubber. Other researchers are assessing sustainability – the environmental, social, and economic viability of the overall wood-to-biofuels supply chain. Willing purchasers of the finished product such as Boeing, Alaska Airlines, the U.S. Navy and Airforce are also partners.

Forest Products Industry Research Program Director **Todd Morgan** sees numerous potential benefits to the NARA project, particularly creating markets for low-value wood in western Montana. "After the Smurfit-Stone closure in Frenchtown, groups interested in forest industry retention have been seeking new types of industries that will fill the void and complement existing industries," Morgan said. "The biofuel industry could use material not currently used, help landowners manage land, and reduce fire hazards. We are capitalizing on a resource and helping to make the U.S. more self-reliant for our energy needs."



SURVEY RESEARCH

Customized, Scientific Data Collection and Analysis

BBER's experienced, highly trained researchers use advanced data collection systems and techniques to conduct surveys for public and private sector clients. For more than 30 years, the professionals in BBER's Survey Research program have adhered to the rigorous standards set by the American Association of Public Opinion Researchers.

Our advanced methods of study design, sample selection, and mathematical analysis ensure data will pass demanding tests like:

- Publication in peer-reviewed, academic journals,
- Testimony before legislators,
- Cross examination in court proceedings, and
- Close scrutiny by the media or interest groups.

BBER's survey research team continually adapts their data collection methods to the changing context of communications. The goal is always to choose the formats that will prove most effective and affordable, whether a study is targeting businesses, average citizens, or hard-to-reach people. BBER's capabilities include:

Phone

Connecting with the growing number of cell-only households through our state-of-the-art interview facility and Montana-based workforce.

Mail

Sending well-designed questionnaires that deliver high response rates and dependable results.

Web

Developing interactive online survey tools with multimedia capabilities to engage the target audience in new and exciting ways.

In 2011-12, BBER's survey research projects included:

- Measuring fire preparedness among Flathead County homeowners,
- Surveying insurance coverage and health status for more than 2,300 Montana households and health insurance benefits at more than 500 businesses, (See sidebar on page 8.)

The Montana Poll®

The Montana Poll® is a statewide public opinion poll that explores the attitudes and opinions of Montanans on a wide variety of social, economic, and behavioral topics. The Montana Poll® is frequently cited as an authoritative source concerning public opinion in the state and is a registered trade name owned by the Bureau of Business and Economic Research. The Poll queries the public on issues including:

- the Montana Index of Consumer Sentiment,
- migration trends,
- Internet use and e-commerce,
- health insurance coverage, and
- food insecurity.

The Montana Poll® also provides government, business, and non-profit organizations the opportunity to add customized, client-specific questions to examine the behavior, preferences, and attitudes of Montanans in a quick and cost-effective manner. Clients may add questions to the Poll on a one-time basis or quarterly to monitor change across time.



- Measuring use and knowledge of alternative medicine for the Montana State University School of Nursing, and
- Conducting surveys measuring satisfaction for Montana Department of Transportation.

The Survey Research team was also pleased to welcome home Director of Survey Development **John Baldrige** from his recent tour in Afghanistan.



SURVEY RESEARCH



Surveying the State of Health Insurance BBER Research Fills Gaps in Knowledge of Health Insurance in Montana

Over the next decade, the Affordable Care Act will transform the health care landscape each year as new provisions take effect. In a quest to understand the challenges ahead in providing health insurance to Montanans, **Monica Lindeen**, the state's Commissioner of Securities and Insurance, sought the help of the Survey Research Center at The University of Montana Bureau of Business and Economic Research.

The results of the research team's expertise and persistence will be published in the forthcoming 2011 Health Insurance Study, a report designed to help policymakers and health planners examine the efficiency, capacity, and flexibility of Montana's health insurance system to meet current needs and future demands.

The purpose of the 2011 Health Insurance Study was fourfold:

- To study the insured, underinsured, and uninsured Montanans,
- Estimate how the Affordable Care Act will affect Montana's insurance market,
- Conduct a formal assessment of people cycling in and out of coverage, and
- Study Montana's current insurance market.

Much of the information needed to fulfill these goals is only available through primary research. BBER conducted two surveys for the project. The first was a survey of 2,306

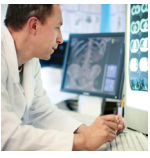
Montana households asking about their health insurance situation. The second was a survey of 516 Montana employers asking about health insurance as an employee benefit.

The household telephone survey provides a model of different groups of Montanans and their current insurance coverage status. The survey explores how different groups are insured and why the uninsured are not insured. The employer survey fills in gaps in our knowledge about Montana businesses' offering of health insurance to their employees.

Data from the surveys were used to develop a profile of the insurance status of Montana residents. An extensive literature search was combined with these profiles to derive estimates of the effects the Affordable Care Act would have on the Montana insurance market.

While the 2011 Health Insurance Study uncovered many major findings, one of the most significant statistics is that nearly one in five Montanans does not have health insurance. Among those who experienced a period without insurance, three-quarters went without insurance because they couldn't afford it.

As Montana's leaders look to take charge of coming changes in health care, BBER is helping to ensure that they go forward armed with the best data possible to make decisions.



HEALTH CARE RESEARCH AND SOCIAL POLICY ANALYSIS

A Trusted Source for Health Care Analysis in Montana

Health care and health care finance have emerged as pivotal issues for businesses, households, and governments throughout the country. Health care services are now one of the largest employing sectors in the economy, and growth in health care spending has significantly outpaced overall growth for almost 30 years. The Bureau recognized the importance of these developments by establishing a Health Care Research Program in the mid-1990s. Since then, BBER has continuously monitored markets, trends, industry structure, and costs related to health care.

Montana's demographics and sparse population present unique health care challenges as well. Our state has one of the largest Medicare populations in the country, and the large distances to urban areas make access to quality care more challenging than in many other states. The BBER Health Care Research Program has devoted considerable time studying the health care needs of special populations in Montana, with emphasis on children and American Indians.

Program Director **Gregg Davis** has been busy with

economic impact studies for the five Catholic-owned hospitals in Montana as well as a follow-up to the 2010 study for Benefis Health System. Davis is also active in the development of Montana's first all payer claims database to allow consumers to access important health care information online.

The UM Bureau of Business and Economic Research is a trusted source for outside evaluations of state health care and social services programs. One such project is an ongoing analysis of the efficacy of targeting high-risk Medicaid patients. Montana is one of only a handful of states with such a program. Another recent BBER study examined the efficacy of the Montana vocational rehabilitation program in returning people to work.

BBER researchers are also engaged in a timely and significant survey-based assessment of the health insurance status of Montana households, including analysis of the impact of the U.S. Affordable Care Act on Montana's insured, uninsured, and underinsured populations. (See sidebar on page 8.)





HEALTH CARE RESEARCH AND SOCIAL POLICY ANALYSIS

In 2010, there were 10.5 million individuals classified as working poor* in the U.S.; people who spent at least 27 weeks in the labor force - that is, working or looking for work - but whose incomes still fell below the official poverty level.

the WORKING POOR

By Thale Dillon

THE LIKELIHOOD OF BEING

WORKING POOR IS THE HIGHEST

IN TWO DECADES

\$7.65
MONTANA MINIMUM WAGE

\$18.00
ESTIMATED LIVING WAGE

MONTANA HAS THE 12TH HIGHEST MINIMUM WAGE IN THE NATION

WHO ARE THE WORKING POOR?

National population by family type:



34% 8% 42% 16%

Likelihood of that family type being working poor:

7% 18% 28%

The typical working poor person is a white female, with a high school diploma and with family responsibilities.

In MONTANA 34% of working families are LOW INCOME.

(Household income below federal poverty threshold: \$18,320 for a 3-person household in 2012. American Community Survey.)

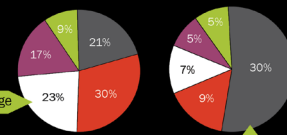
JOBS LIKE:

- security guards
- nurses' aides
- home health care aides
- child care workers
- educational assistants
- ambulance drivers
- bank tellers
- pharmacy assistants
- etc.

ARE CONSIDERED LOW-WAGE, LOW-REWARD POSITIONS

HOW OLD ARE THE WORKING POOR?

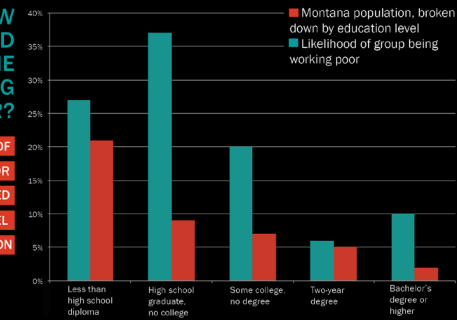
- 16-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55+ years



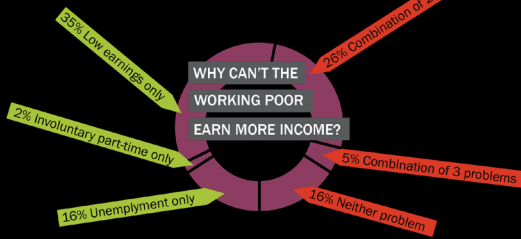
People between the ages of 20 and 24 years are the most likely to be working poor, closely followed by ages 16-19.

HOW EDUCATED ARE THE WORKING POOR?

THE LIKELIHOOD OF BEING WORKING POOR IS INVERSELY RELATED TO A PERSON'S LEVEL OF EDUCATION



There are three major labor-market problems: unemployment, involuntary part-time work, and low earnings.



SOURCES: U.S. Census Bureau, U.S. Department of Commerce; Bureau of Labor Statistics, U.S. Department of Labor; Bureau of Business and Economic Research, The University of Montana.
Thale Dillon is the director of Montana KIDS COUNT at the Bureau.

Montana KIDS COUNT

Research and Resources to Improve the Lives of Children and Families

Montana Kids Count is one of 53 similar projects throughout the United States funded by the Annie E. Casey Foundation and one of eight centers nationwide hosted within a university. This network of state grantees uses data to promote the wellbeing of children at the local level, and to track changes in outcome over time, providing the basis for comparative and trend analysis.

The Montana Kids Count Data Book is published annually and includes information on demographics, health, vital statistics, and education. This book is designed to provide the most current and accurate data and indicators to policymakers, legislators, educators, parents, and others throughout the state.

In April 2012, Kids Count Director Thale Dillon, Research Specialist Jennifer Calder, and BBER Marketing Director Christina Henderson launched a successful Kids Count Data Book Release event in Helena. More than 50 people attended and the event received overwhelmingly positive reviews. The event served as a way to heighten Montana Kids Count's profile in the state, and more data books were distributed than ever.

Montana Kids Count started publishing quarterly issue briefs in 2012, beginning with a 12-page Spring issue focused on child hunger and a Summer issue covering high school graduation rates. Kids Count also produced a new infographic on The Working Poor. (See image.)



PUBLICATIONS



MONTANA BUSINESS QUARTERLY The Premier Business and Public Policy Publication for Montana

The Bureau of Business and Economic Research has published the award-winning *Montana Business Quarterly* (MBQ) for nearly 50 years. The MBQ continues to grow subscription levels and revenues with innovative design, original research, and provocative articles on pressing topics.

In FY 2012 BBER added 128 paid *Montana Business Quarterly* subscribers, an increase of 11 percent over FY 2011.

During 2011-12, BBER made front page news in a variety of newspapers for research that appeared in the *Montana Business Quarterly*. The MBQ tackled issues such as the Affordable Care Act, Montana's forest economy, and entrepreneurship and innovation. In a fresh redesign of the Spring issue, the *Montana Business Quarterly* expanded its coverage of the industries featured in the 2012 Economic Outlook. Publications Director **Shannon Furniss** interviewed Montana's leading experts on state and local forecasts, energy, housing, travel and recreation, health care, agriculture, manufacturing, and forest products, featuring it as the lead article for the Spring issue.

The key roles BBER and *Montana Business Quarterly* play at The University of Montana were underscored by introductory messages in each issue by UM President

UM Bureau of Business and Economic Research Wins Three Publications Awards

The University of Montana Bureau of Business and Economic Research earned three national Awards of Excellence in Publications in FY 2011 for the *Montana Business Quarterly*, the Montana Kids Count Data Book, and the Montana Manufacturers Survey.

The awards were presented by the Association for University Business and Economic Research at its annual conference in Indianapolis. AUBER is the professional association of business and economic research organizations at public and private universities and consists of 100 leading university-based economic research centers.

"We're proud of the quality and effectiveness of our publications," said BBER Director **Patrick Barkey**. "It is especially satisfying to see our work recognized on a national stage."

The *Montana Business Quarterly* staff includes **Shannon Furniss**, editor; Christina Henderson, marketing director; and **Nate Hegyi**, publications assistant. **Gwen Landquist** was responsible for cover design. The Kids Count Data book was produced by **Thale Dillon**, Kids Count director, Furniss and Hegyi. The Montana Manufacturers Survey was the responsibility of **Charles E. Keegan III, Todd A. Morgan, John Baldrige**, Furniss, and Hegyi.

Royce Engstrom, UM Provost **Perry Brown**, School of Business Administration Dean **Larry Gianchetta**, and BBER Director **Patrick Barkey**. A recent Q&A with **Dean Gianchetta** and **Joe Fanguy**, UM's director of technology transfer, featured prominently in an MBQ cover story on the new partnership that helps inventions become viable business enterprises.

This year brought some fresh faces to the publications team as **Nate Hegyi** left for a time to pursue creative opportunities in Austin, TX. We are happy that Nate has returned, and in the interim welcomed **Jayme Fraser** and **Billie Loewen** as publications assistants. Both women also served as editors of the UM's student newspaper, the *Montana Kaimin*.

To subscribe to *Montana Business Quarterly*, visit www.bber.umt.edu/mbq.



SEMINARS AND OUTREACH

Outlook 2012

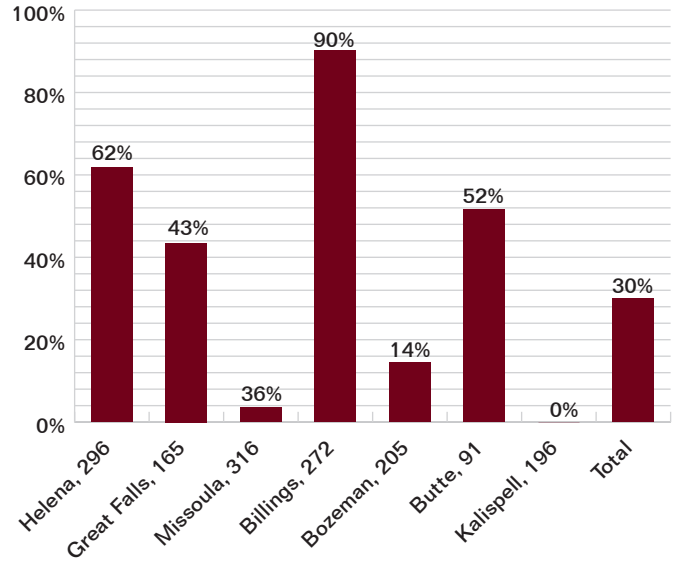
Attendance at Montana Economic Outlook Seminars Increased 30 Percent

Each year between late January and mid-March, Bureau economists and other experts travel across Montana to offer statewide and community economic forecasts for the coming year, including reports on key industries like health care, forest products, real estate, agriculture, and tourism. In 2013 BBER will add a new presentation on Montana’s energy sector to the program.

The 2012 Montana Economic Outlook Seminars set a new record for attendance. Though audiences have grown steadily for decades, in 2012 attendance grew by 90 percent in Billings, and by 30 percent overall. Total seminar registrations rose by 384 people, with more than 1,800 registered in all nine seminar cities.

Tom Richmond, administrator and petroleum engineer for the Montana Board of Oil and Gas, delivered the keynote presentation “Montana’s New Energy Frontier: What are the Prospects?” with events in Helena, Great Falls, Missoula, Billings, Bozeman, Butte, Kalispell, Lewistown, and Havre.

Percent Increase in Attendance, 2011 - 2012



For information on the next Montana Economic Outlook Seminar series, visit: www.bber.umt.edu/events



More than 300 people attended the Helena seminar in 2012.



SEMINARS AND OUTREACH

Audiences for the 2012 Montana Economic Outlook Seminars included:

- Influential leaders such as Montana's Lieutenant Governor, Attorney General, Commissioner of Higher Education, University Presidents, and CEOs of major corporations.
- 30 percent of Montana state legislators.
- More than 20 staff members for Montana's congressional delegation.
- Business owners and professionals in banking, real estate, health care, construction, and energy.

The tremendous growth of the Economic Outlook Seminars in the last year shows BBER is in touch with what Montanans need and want to hear about the economy. Our

seminar team is constantly making improvements in response to audience feedback. A redesigned briefing book and new printed PowerPoint booklet were very well-received by attendees in 2012. In response to the changes, the number of survey respondents who found the booklets helpful during the presentations rose by 20 percent.

BBER surveys showed 95 percent of attendees at the Montana Economic Outlook Seminars were satisfied or very satisfied with their experience and a large majority of the audience attends year after year. Participants appreciated the variety of topics presented, the quality of information and materials, and the inclusion of city/county information along with the national and state economic outlooks.





SEMINARS AND OUTREACH

MIDYEAR ECONOMIC UPDATE

Continued Analysis of the New Energy Boom

Montana's new energy boom has breathed life and vitality into the eastern half of the state, drawing workers and investors from around the country and the world. Keeping up with demand for data on this growing industry, BBER economists **Patrick Barkey** and **Paul Polzin** spoke on "Five Questions Montanans Should Ask about the Energy Boom" at the 7th Annual 2012 Mid-Year Economic Update series sponsored by the Montana Chamber of Commerce in the summer of 2012. This mid-year update reexamines the state and local economic forecasts, accounting for changes in the economy since the Montana Economic Outlook Seminar with events in Helena, Great Falls, Missoula, Billings, Bozeman, Butte, and Kalispell.

MONTANA ECONOMIC MINUTE

Making Economic Analysis Accessible Through Sound Bites



The **Montana Economic Minute** podcast was started in January of 2009 and consists of daily one-minute segments written and recorded by BBER director **Patrick Barkey**. The Montana Economic Minute airs on radio stations throughout the state, providing insights on economic issues that are timely and newsworthy. The podcast is also featured on the homepage of the Bureau's website, www.bber.umt.edu.





SEMINARS AND OUTREACH

WEBSITE AND SOCIAL MEDIA

Sharing Economic Information in the Digital Age

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 BBER website allows visitors to subscribe to the MBQ, correspond with Bureau employees, and register for the Economic Outlook Seminars. In FY 2012, BBER's web development team embarked on a complete website redesign, due to be unveiled in FY 2013.

Economic information available on the BBER website includes:

- state and local economic outlook reports, income data, employment, population, economic impact studies,
- survey research on Montana's labor supply, land use, tourism, transportation, alcohol use, gambling, the Montana Poll®,
- health care analysis on insurance, Medicare, market forecasts,
- Montana Manufacturers Survey and MMIS database,
- forestry data, log prices, timber capacity, biomass research, and
- Montana KIDS COUNT data by county.

New reports and data sets are added to the website regularly. Visitors may sign up for the email list on the BBER homepage for regular updates.



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SERVICE TO THE UNIVERSITY, PROFESSIONAL ASSOCIATIONS, AND COMMUNITY

Bureau personnel are leaders in their respective fields, serving on boards for professional organizations, filling key roles at the UM, and sharing their expertise with groups across the state. Some of the many ways we served the community in 2011-12 include:

- Giving more than 80 presentations across Montana and the Pacific Northwest for educational leaders, elected officials, professional associations, and service clubs.
- Answering information requests for hundreds of individuals and organizations.
- Providing numerous articles and quotes for newspapers, TV, and radio.
- Serving on boards and committees for organizations like the Society of American Foresters, Forest Products Society, Montana Environmental Education Association, MSU's Montana Manufacturing Extension Center (MMEC), American Association of Public Opinion Research (AAPOR), Association for University Bureaus of Economic Research (AUBER), Pacific Northwest Regional Economic Conferences (PNREC), The Montana Health Care Forum, Montana Council on Economic Education (MCEE), Montana Economic Developer's Association (MEDA), Missoula Development Authority, and City Club Missoula.
- Acting as peer reviewers for publications such as *American Journal of Health Promotion*, *USDA Forest Service Research*, *Western Journal of Applied Forestry*, and *Forest Products Journal*.
- Representing the state of Montana in the Federal-State Cooperative Population Estimates Program (FSCPE), a partnership between the states and the U.S. Census Bureau.
- Teaching classes, serving on graduate committees, and reviewing scholarship applications for students at The University of Montana.

BBER has maintained a long tradition of intensive involvement in its national organization. The Bureau continues to serve as the business office and secretary-treasurer for the Association for University Bureaus of Economic Research (AUBER), publishes the AUBER newsletter, and serves as AUBER webmaster.



BBER is also actively involved in the Pacific Northwest Regional Economic Conferences (PNREC), providing event planning support and managing online registration for this year's event in Seattle, WA. This two-day conference on regional economic issues draws professionals from throughout the Pacific Northwest and Canada. BBER Director **Patrick Barkey** will serve as president of PNREC in 2012-13.

RESEARCH PROJECTS

ECONOMIC ANALYSIS

The Economic Impact of Increased Coal Production at the Spring Creek Mine, ongoing. Sponsored by the Montana Chamber of Commerce. An impact analysis of increasing production at Cloud Peak Energy's Spring Creek mine near Decker, MT, with the additional output targeted at Asian markets.

An Econometric Analysis of the Effect of State and Local Tax Policy on Telecommunications Industry, ongoing. Sponsored by the Montana Taxpayers Association. A cross sectional analysis of how central assessment and other aspects of property tax policies across states affect the investment and scale of the telecommunications industry.

Otter Creek Coal Development: Research Publication and Tax Analysis, ongoing. Sponsored by the Montana Chamber of Commerce. An extension to the completed economic impact study that (i) adds an analysis of Otter Creek coal development on state and local tax revenues, by type of tax and jurisdiction, and (ii) develops a research publication which explains the results of the research and provides examples which demonstrate the findings.

The Economic Impact of Otter Creek Coal Development, June 2012. Sponsored by the Montana Contractors Association. An economic impact analysis of the potential development of Powder River basin coal in the Otter Creek tracts owned or leased by Arch Coal. Includes the impact of development of the Tongue River Railroad.

The Economic Contribution of Rocky Mountain Laboratories, February 2012. Sponsored by Rocky Mountain Laboratories, Hamilton, MT. An analysis of the economic impact of this federally funded research facility in Ravalli County on both the state and region.

FOREST PRODUCTS RESEARCH

Southern Rockies Logging Utilization, ongoing. Joint venture 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 Arizona and New Mexico. Project completion date December 2016.

Employment and Income Response, ongoing. Challenge cost share agreement with the USDA Forest Service, Ecosystem Management Coordination (EMC), Fort Collins, CO, to conduct a national analysis of direct employment and worker earnings associated with the harvesting, hauling, and processing of timber into primary wood products. Project completion date December 2014.

AFRI Northwest Biomass Feedstock Analysis, ongoing. Cooperative research agreement through WSU with the USDA Agriculture and Food Research Initiative (AFRI) to conduct a comprehensive analysis of the woody biomass supply and potential for bio-jet fuel production in Montana, Idaho, Oregon, and Washington. Project completion date July 2013-to be extended.

Pacific States Forest Industry and Timber Harvest Analysis, ongoing. Joint venture 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. Project completion date June 2013.

Region One Timber-Processing Capacity, ongoing. Purchase order agreement with the USDA Forest Service, Region One, Missoula, MT, to conduct an analysis of timber flow and wood-using capacity of mills in Montana and Idaho. Project completion date December 2012.

Enhancing the Timber Products Output (TPO) Program in the Northern U.S. and Developing a Strategic Plan for Nationalizing TPO, ongoing. 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. Project completion date March 2014.

Region One Logging Costs, ongoing. 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. Project completion date December 2013 to be extended.

Pacific States Forest Industry and Timber Harvest Analysis, ongoing. 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. Project completion date December 2015.

Inland Northwest Forest Products Research Consortium 2011, ongoing. 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. Project completion date June 2013.

RESEARCH PROJECTS, CONT.

Timber Product Output and Forest Industry Analysis for the Interior West States, ongoing. 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. Project completion date April 2016.

Inland Northwest Forest Products Research Consortium, 2010, August 2012. 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.

Idaho Logging Utilization, March 2012. 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, December 2011. Cooperative research agreement with the USDA Forest Service, Pacific Northwest Research Station, Portland, OR, to provide updated estimates of the timber-processing capacity and proportion of capacity utilized by mills in Washington and Oregon.

MANUFACTURING RESEARCH

2011 Montana Manufacturing Firms Database Management Project, September 2012. Community Trade Adjustment Assistance sub-award to the Bureau of Business and Economic Research at The University of Montana through the Bitterroot Economic Development District (BREDD) to enhance, update, and promote the Montana Manufacturers Information System (MMIS) maintained by BBER.

The State of Montana Manufacturing, June 2012. Prepared for the Montana Manufacturing Extension Center, Montana State University-Bozeman.

The Evaluation and Economic Impact of the Montana Manufacturing Extension Center, April 2012. Prepared for the Montana Manufacturing Extension Center, Montana State University-Bozeman.

Montana Manufacturers' Survey 2011-12. A survey administered for BBER's Manufacturing Research Program that examines the annual business performance of Montana's largest manufacturing firms.

SURVEY RESEARCH

AUBER Membership Survey, 2011. A web-based questionnaire surveying members of the Association for University Bureaus of Economic Research regarding characteristics of each center, activities and publications, employee and budget information, and other items. Data and analysis were published in an accompanying report.

A Study of the Post Vocational Rehabilitation Earnings Attributable to the Montana Vocational Rehabilitation Program. Data collection and analysis of earnings data attributed to participants in the Montana Vocational Rehabilitation Program.

Montana Health Insurance Study, 2011. Survey of 2,306 households regarding insurance coverage and health status and a survey of 516 businesses measuring whether they provided health insurance as a benefit. Project included questionnaire development, sampling, data collection and report writing.

MDT TranPlan 21 Public Involvement Survey, 2011. Telephone survey and data analysis of Montana households for MDT measuring satisfaction with MDT.

MDT TranPlan 21 Stakeholders Survey, 2011. Telephone survey and data analysis of MDT stakeholders measuring satisfaction with MDT.

BehavePlus Web Survey. Web-based survey of users of the BehavePlus Fire Modeling software for the Missoula Fire Sciences Lab of the USDA Forest Service.

Flathead Wildfire Preparation Survey. Mail survey of Flathead County homeowners regarding preparation for fire in the Wildland-Urban Interface for the Montana School of Forestry. Project included sampling and preparation of data for analysis.

MSU Nursing Alternative Medicine Survey. Telephone survey of Montana, Idaho, Wyoming, North Dakota, South Dakota, Washington and Oregon. Householders over the age of 55 regarding use of and knowledge of alternative medicine for the Montana State University School of Nursing. Project included sampling, programming of CATI instrument and preparation of data for analysis.

Missoula County Real Estate Report, 2011. Contributed demographic and economic data to a study of the Missoula area real estate market prepared by a committee of local stakeholders.

UM Graduate Survey, 2011. Questionnaire development for a web-based survey of University of Montana graduates.

Montana Poll, December 2011. A survey administered for the Bureau of Business and Economic Research that tracks Montana consumer sentiment, food insecurity, computer ownership and Internet access, and other important demographic characteristics of Montana residents.

RESEARCH PROJECTS, CONT.

Health Care Research & Social Policy Analysis

The Economic Contribution of the Sisters of Charity of Leavenworth Health System and Providence Health and Services to Their Local Economies, ongoing. A study of the economic importance of five Catholic owned hospitals in Montana to each of their respective local economies.

A Study of the Impact of the Montana Vocational Rehabilitation Program on the Montana Economy, ongoing. Sponsored by Montana Vocational Rehabilitation Program. A study examining the efficacy of the Montana vocational rehabilitation program in returning people to work and examine the cost-benefit of the program from a state and federal tax dollar perspective.

National Economic Impacts from TechLink-Brokered Partnerships between the Department of Defense and U.S. Industry, 2000-2011, June, 2012. Sponsored by TechLink, Bozeman, Montana. The first of three studies to examine the impact of facilitated technology transfers from the Department of Defense to private industries.

The Economic Contribution of the Benefis Health System to the Cascade County Economy. Sponsored by Benefis Health System. An update of a 2010 study to quantify in terms of employment, labor income and sales the contribution of the Benefis Health System to the economy of Cascade County using 2011 data.

All Payer Claims Data Base Project, Phase II, ongoing. In collaboration with The Montana Association of Health Care Purchasers. Sponsored by the Office of the Commissioner of Securities and Insurance, Montana State Auditor. A project addressing the concerns brought out in HB 573 concerning the development of an All Payer Claims Database for Montana. In addition, the project will pilot two projects using Medicaid data to demonstrate the potential insights to be gleaned from an All Payer Claims Database.

A Study of Montana's Health Insurance Markets, ongoing. Sponsored by The Office of the Commissioner of Securities and Insurance, Montana State Auditor. This study examines the health insurance markets in Montana from the standpoint of the uninsured, underinsured, the impact of the Affordable care Act, and cycling within health insurance markets.

Health Insurance Market Analysis, ongoing. Sponsored by the Office of the Commissioner of Securities and Insurance, Montana State Auditor. This study examines the structure of Montana's health insurance market with respect to some of the provisions of the Affordable Care Act.

Cost Analysis of a Nurse Care Management Program for High-Risk Medicaid Patients in Montana, ongoing. Sponsored by the Commonwealth Fund. Montana is one of only a hand full of states with a program targeted toward high-risk Medicaid enrollees. This study will examine the efficacy of targeting high-risk Medicaid patients in reducing the utilization and cost of providing health care to Montana's financially indigent population.

Early Childhood Comprehensive System (ECCS) database maintenance and evaluation, ongoing. An extensive database containing indicators for school readiness in pre-Kindergarten children, evaluating progress in the domains of Ready Families, Ready Communities, Ready Schools, Ready Services and Ready State. By contract with the Early Childhood Services Bureau, DPHHS.

Montana Epidemiological Workgroup, ongoing. Convene and facilitate bi-annual meetings of the state's cross-agency epidemiological work group, and develop annual updates to the state's epidemiological profiles; by contract with the Addictive and Mental Disorders Division, DPHHS.

Early Childhood Comprehensive System, ongoing. Maintenance and evaluation of extensive database of indicators for school readiness in pre-Kindergarten children, evaluating progress in the domains of Ready Families, Ready Communities, Ready Schools, Ready Services and Ready State; by contract with the Early Childhood Services Bureau, DPHHS.

Best Beginnings Advisory Council, ongoing. Assisting in developing needs assessment and strategic plan for the Best Beginnings Advisory Council, a cross-program effort to streamline services for young children in Montana; by contract with the Early Childhood Services Bureau, DPHHS.

Healthy Montana Teens Evaluation, ongoing. A federally-mandated qualitative and quantitative evaluation of progress related to services provided for pregnant and parenting teenagers in the state; Year One of 5-year project, by contract with the Early Childhood Services Bureau, DPHHS.

State Prevention Enhancement Grant. Development of statewide data profiles of substance abuse and mental health issues across age groups and associated evaluation and rankings of problem severity, to inform the work of the cross-agency SPE Consortium; by contract with the Chemical Dependency Bureau, DPHHS.

2011 Head Start Needs Assessment. Annual update of federally-mandated needs assessment for the Montana Head Start program; by contract with the Head Start/State Collaboration Office of DPHHS.

PUBLICATIONS

ECONOMIC ANALYSIS

- Polzin, Paul, 2012. "Transportation Systems Key to Montana's Energy Future." *Montana Business Quarterly*, Vol. 50, No. 2, Summer 2012.
- Barkey, Patrick M., 2012. "Montana Economic Outlook: Recovery Still Stuck in the Starting Gate." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Barkey, Patrick M., 2012. "Lewis and Clark County: A Distinctly Different Recession Experience." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Barkey, Patrick M., 2012. "Missoula County: Still Waiting For Growth to Arrive." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Barkey, Patrick M., 2012. "Yellowstone County: Economy Improves Moving East." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Davis, Gregg, 2012. "Flathead County: The Economic Rebound – Three Business Perspectives." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Polzin, Paul, 2012. "Butte-Anaconda: Serving the World's Economy." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Polzin, Paul, 2012. "Cascade County: Malmstrom is a Two-Edged Sword." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Polzin, Paul, 2012. "Fergus County: Lewistown Area Did Not Escape Recession." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Polzin, Paul, 2012. "Gallatin County: Recovery has Started." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Polzin, Paul, 2012. "Hill County: Growth to Accelerate as Recession Effects Fade." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Sylvester, James T., 2012. "Ravalli County: Waiting for Recovery." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Henderson, Christina, 2011. "Innovators and Job Creators: Montana's Second-Stage Businesses are Thriving in a Down Economy." *Montana Business Quarterly*, Vol. 49, No. 4, Winter 2011.
- Barkey, Patrick M., 2012. "Is Montana's Recovery at Risk? Challenges Abound for State Economic Growth." *Montana Business Quarterly*, Vol. 49, No. 3, Autumn 2011.

FOREST PRODUCTS AND MANUFACTURING

- Hayes, S.W., C.E. Keegan, T.A. Morgan, and C.B. Sorenson. 2012. "Manufacturing Outlook: Modest Improvement and Employment Growth in Some Sectors." *Montana Business Quarterly*, Vol. 50, No. 2. 14-20.
- Morgan, T.A., C.P. McIver, C.B. Sorenson, C.E. Keegan and S.W. Hayes. 2011. "Montana's Forest Economy: A Roller Coaster Ride Through the First Decade of the 21st Century." *Montana Business Quarterly*, Vol. 49, No. 4. 2-7.
- Keegan, C.E., C.B. Sorenson, T.A. Morgan, S.W. Hayes, and J.M. Daniels. 2012. "Impact of the Great Recession and Housing Collapse on the Forest Products Industry in the Western United States." *Forest Products Journal* 61(8):625-634.
- Keegan, C.E., K.A. Blatner, T.A. Morgan, and J.M. Daniels. (In Revision) "Trends in Lumber Processing in the Western United States Part III: Residue Recovered vs. Lumber Produced." *Forest Products Journal* (Submitted June 2012).
- Simmons, E.A., E.C. Berg, T.A. Morgan, C.B. Gale, S.J. Zarnoch, and S.W. Hayes. (In Revision) "Idaho Logging Utilization: 2008/2011." *Western Journal of Applied Forestry*. (Submitted May 2012).

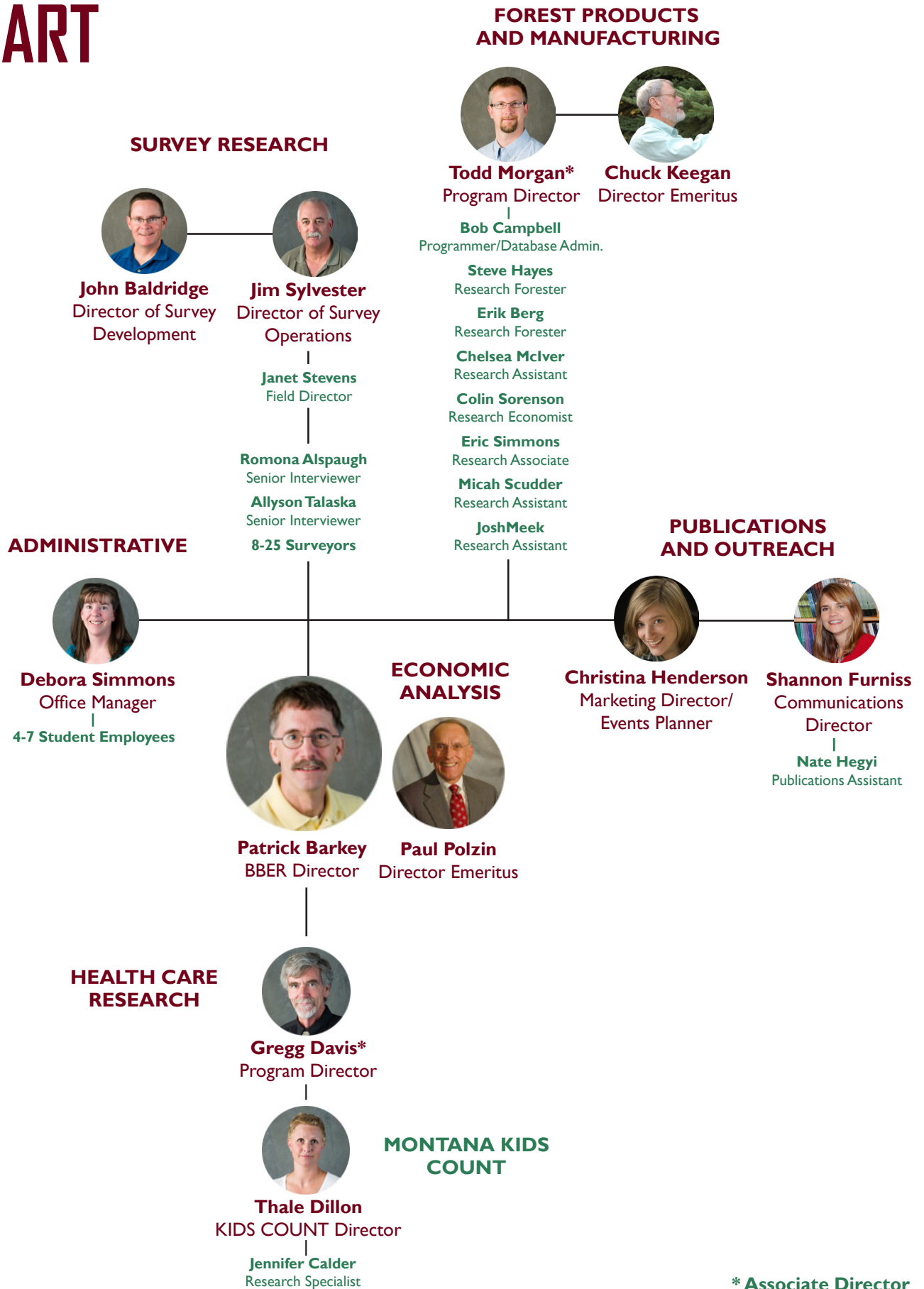
SURVEY RESEARCH

- Sylvester, James T., 2011. "More Native Montanans in East than West." *Montana Business Quarterly*, Vol. 49, No. 4, Winter 2011.
- Sylvester, James T., 2011. "Montana's Population Growth is Mostly in Western Counties." *Montana Business Quarterly*, Vol. 49, No. 3, Autumn 2011.

HEALTH CARE RESEARCH AND SOCIAL POLICY ANALYSIS

- Dillon, Thale, 2012. "The Working Poop." *Montana Business Quarterly*, Vol. 50, No. 2, Summer 2012.
- Davis, Gregg, 2012. "Economic Outlook: Health Care." *Montana Business Quarterly*, Vol. 50, No. 1, Spring 2012.
- Davis, Gregg, 2011. "The Affordable Care Act: Montana's Second Steps." *Montana Business Quarterly*, Vol. 49, No. 3, Autumn 2011.
- Dillon, Thale, and Ian Marquand, 2011. "Hunger Issues Present Challenges for Families, Workforce, and Economy." *Montana Business Quarterly*, Vol. 49, No. 3, Autumn 2011.
- Dillon, Thale and Daphne Herling, 2012. "Graduation Counts." *Montana KIDS COUNT Issue Brief*, Vol. 1, No. 2, Summer 2012.
- Dillon, Thale and Daphne Herling, 2012. "When Children Go Hungry." *Montana KIDS COUNT Issue Brief*, Vol. 1, No. 1, Spring 2012.
- Montana KIDS COUNT Data Book 2011, April 2012.

ORGANIZATIONAL CHART



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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 60 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;
- publishes the award-winning *Montana Business Quarterly*.

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 thinking is clearer up here

School of
**BUSINESS
ADMINISTRATION**
The University of Montana